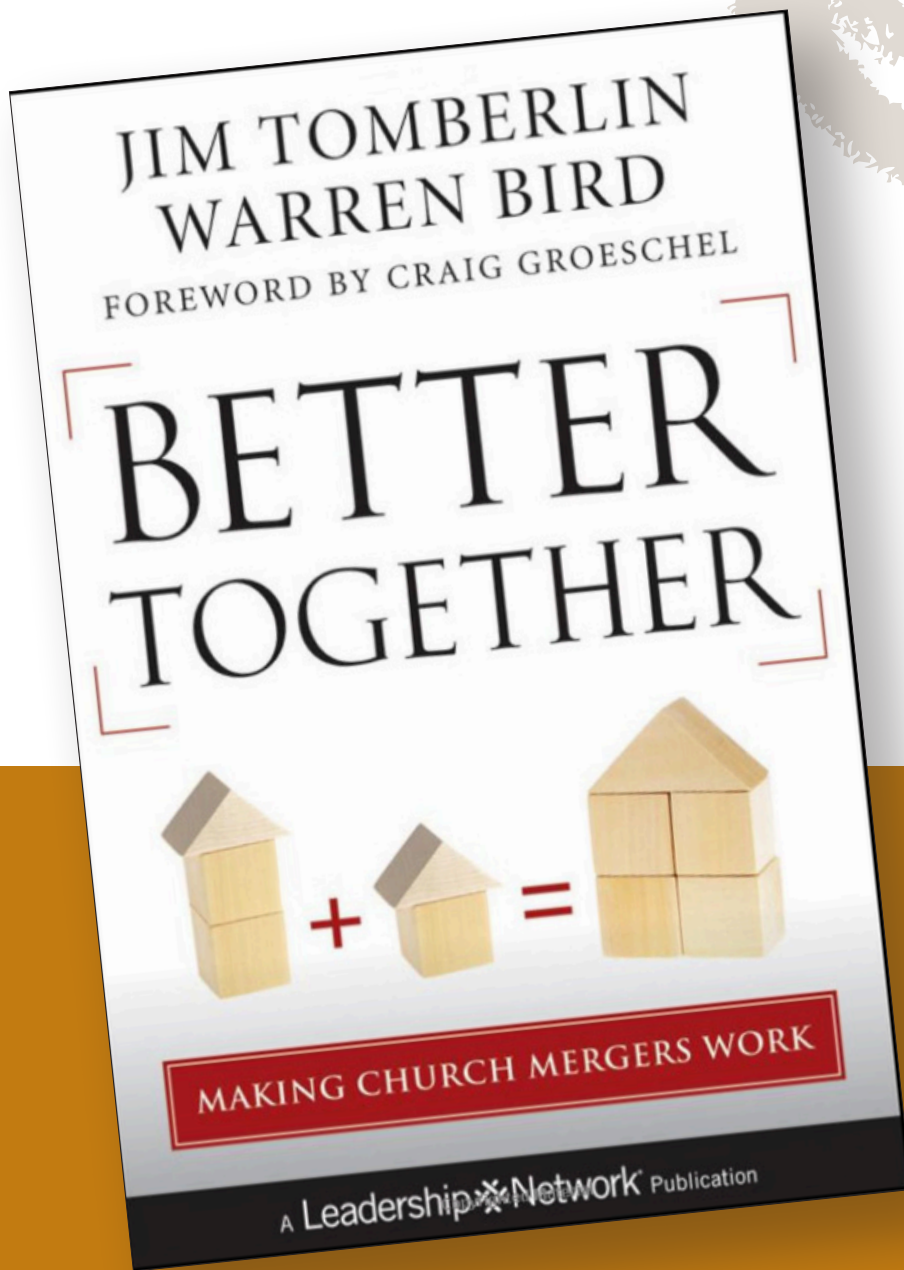


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Better Together | *Jim Tomberlin, Warren Bird*

Better Together: Making Church Mergers Work
 Jossey-Bass: San Francisco, CA, 2020. 252 pages.

Church merger consultant Jim Tomberlin and Leadership Network Research Director Warren Bird make the case that mergers today work best not with two struggling churches but with a vital, momentum-filled *lead* church partnering with one or more *joining* churches. Based on solid research and practical experience, *Better Together: Making Church Mergers Work* provides a hands-on guide so that lead churches and joining churches can each understand the issues, select an appropriate model, and develop strategies that will create a positive, healthy merger.

Better Together shows how to think about and complete a successful merger. Part One is introductory; Part Two is informative; and Part Three is instructional. Appendixes at the end include a checklist of steps to take in a merger, FAQs from actual mergers, and further details on several dozen churches whose merger stories are in the book.

Mission-driven church mergers have tremendous potential to exponentially expand the impact of strong, vibrant churches as well as to revitalize plateaued and declining churches.

1

Part One: The New Merger Landscape

According to Leadership Network research, about 2 percent of US Protestant churches merge annually – about 6,000 congregations. Another 5 percent of churches say they have already talked about merging in the future - another 15,000 additional churches.

These churches are sensing that they could fulfill their God-given mission better together than separately, and they're exploring new ways to join forces for the advancement of God's kingdom.

Merger is not the only term being used; other terms include restart, replant, partnership, adoption, collaboration, consolidation, satellite, unification, reunification, or even something more indirect like joining forces, repotting, or building a legacy. Whatever label you want to give it, mergers are happening with increasing frequency.

Mergers are showing up in a wide variety of contexts, each variation offering a slightly different benefit. The leading contexts for mergers include:

- *Long-established churches growing* – a growth cycle marked by a fresh vitality and spiritual energy
- *Long-established churches declining* – facing dim prospects, churches discover the possibility of leaving a solid foundation for something new
- *New churches growing* – plenty of people growth but cramped by their facilities
- *New churches struggling* – merging back with parent church or with another church
- *Churches formerly separated, reunited* – realizing they can do more together than apart
- *Racially and ethnically diverse* – mergers bringing about multiethnicity
- *Multisite churches* – acquiring another campus through merger

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- *Mainline and denominational churches, supporting* – assisting nearby struggling congregations, nurturing them back to health
- *Megachurches* – churches combining to reach a membership of 2,000 or more
- *Megachurch national network* – an intentional strategy that encourages and facilitates church mergers
- *Pastor succession* – seeing merger as the path to a successful transition when their pastor retires

The authors sense that God is clearly behind the momentum of mergers, citing Isaiah 43:19 as another example of God doing a “new thing” and helping congregations reach new levels of unity, maturity, and the fullness of Christ (Ephesians 4:13).

Church mergers offer a five-way win:

- Struggling churches win as they get a fresh start in living out God’s purpose for their church
- Strong churches win as they gain momentum when struggling churches join them
- The Body of Christ wins because the corporate witness of the local church is stronger and better able to make disciples
- Local communities win when they are served better by strong vibrant congregations
- The Kingdom of God wins through advancement and growth of vital, life-giving congregations

Why should your church consider a merger?

- To be better together than each church is individually
- To begin a new church life cycle
- To reach more people for Christ
- To make a greater difference for Christ
- To multiply your church’s impact
- To better serve your local community
- To leverage the legacy and good reputation of the past
- To maximize church facilities
- To be a stronger local church
- To further extend God’s kingdom

Mergers are not a strategy for maintaining the status quo.

Today’s church mergers are more mission-driven whereas mergers in the past were survival-driven. Several reasons for this include:

- The old math of mergers was often $1 + 1 = 2$, which rarely produces a vibrant, healthy church
- The old approach to mergers often embodied little more than a chance to survive
- At its best, mergers were seen as a way of making the church work better

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By contrast, today's successful mergers tend to be missional in focus with one church embracing the vision and strategy of the other church. The "new math" of today's mergers is more synergistic in nature. Both churches are motivated by a strong, future-oriented sense of mission rather than just survival. Three exploratory questions often frame the conversation and represent the heart of a mission-driven merger:

1. Could we accomplish more together than separately?
2. Would our community be better served?
3. Could the kingdom of God be further extended by our merger?

Four Models for Healthy Mergers

- *Rebirth* mergers – a struggling or dying church that gets a second life by being restarted under a stronger, vibrant, and typically larger church
- *Adoption* Mergers – a stable or stuck church that is integrated under the vision of a stronger, vibrant, and typically larger church
- *Marriage* Mergers – Two churches, both strong or growing, that realign with each other under a united vision and new leadership configuration
- *ICU* Mergers – Two churches that know they're in trouble and try to turn around their critical situation but are more survival-driven and often fail

The starting point for successful church mergers today is a strong motivation beyond just survival or even a desire for local church unity. Mergers have the best chance of success when they are unified around a clear, biblically based mission and share a common theology and faith practice.

Improper motives for mergers include the following:

- Preservation – more hope in preserving the past than developing a new future
- Denial – using the merger to distract from addressing deeper problems
- Personal gain – creating job security for a church leader
- Financial motivation only – using assets for endowment or deferred maintenance
- Personal glory – using mergers to bolster a big ego

While some circumstances are not questionable in themselves, they can often lead to inappropriate motives or mergers based on distrust. Two of the most common include:

- Valuable property – older, declining churches often have facilities that are in disrepair and are surpassed in worth by the land they occupy – a temptation for a quick sell
- Denominational pressure – A denominational effort to shore-up a declining congregation through merger is usually resented by all parties and stands little chance of long term success

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There are at least six reasons for a healthy church merger:

- *Mission Driven Mindset* – when churches discern that their synergy could lead to a greater impact for the kingdom of God
- *Economic Driven Pressures* – when churches conclude that merger may be a way to have a “second life” instead of closing the doors of the church or limping along into a doubtful future
- *Multisite Driven Momentum* – when a joining church (most often) feels it can best serve Kingdom purposes by becoming part of a multisite church
- *Succession Driven Strategies* – a vehicle for a seamless senior pastor succession that keeps the church moving forward
- *Reconciliation Driven Hope* – when churches who have split from one another come back together in biblical restoration and reconciliation
- *Desire to be Multiethnic* – a dramatic and accelerated way to become truly multiethnic by incorporating a minority congregation through merger

2

Part Two: How Healthy Church Mergers Work

It is helpful to view mergers as happening in different stages, with the speed of each stage based on your specific circumstances.

- *Exploration* – like dating, as you assess the possibility of merging (1-2 months)
- *Negotiation* – like courtship, as you determine the feasibility of a merger (1-2 months)
- *Implementation* – like engagement, as you make a public announcement (1-3 months)
- *Consolidation* – like a wedding, as the union takes place (2-4 weeks)
- *Integration* – like a marriage, as the two congregations begin the hard work of learning how to live together as one church (3-6 months later)

Three Big Questions to Address

- Is this merger possible?
- Is this merger feasible?
- Is this merger desirable?

Setting Milestones

The authors studies of successful church mergers revealed three measurable standards as a way to define and measure success:

1. **Stabilize** – within one year of the merger, the church’s leadership will have created a new congregational culture that embraces the merger, focuses on the future, provides financial steadiness, and sustains an attendance equal to or greater than that prior to the merger.

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2. **Grow in people and finances** – within three years of the merger, the attendance and the financial base will have each grown by at least 10 percent, and new attendees will more closely represent the demographics of the surrounding community.
3. **Be able to replicate** – within five years of the merger, more than half the leadership and involvement will be composed of people who joined after the merger and have embodied the church's heart of outreach to the point of reproducing themselves in some form.

A table developed by the authors listing these three standards, covered in the areas of Mission and Vision, Integration, Attendance, Finances, and Community Impact over the 1, 3, and 5-year milestones, is a tremendous tool for churches considering merger.

The challenge of institutional survival versus shared mission and vision for the future is central to every merger's success or failure.

Why Mergers Fail

There are many landmines to step on in a merger process, and they can be found in three distinct phases:

- Preliminary phase
 - Waiting too long to consider merging
 - Lack of clarity on the non-negotiables
 - Proceeding with insufficient information
 - Confusion about models and roles
- Deliberation phase
 - Looking back instead of forward
 - Refusal to release control
 - Minimizing the cultural and doctrinal differences
 - Undercommunicating
- Postmerger phase
 - Underestimating the pain in the transition
 - Overpromising and underdelivering
 - Unclear organizational structure

Financial and Legal Aspects of a Merger

Many churches retain legal counsel to walk them through the intricacies of the merger process. In most cases, it's wisest for all parties to involve legal representation. Attorney David Middlebrook of Church Law Group offers the following information:

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Three Ways to Merge

- Merger – a formal and legal procedure following the laws of your state
- Asset purchase and dissolution – lead church assets and liabilities of joining church, which is then dissolved
- Donation and dissolution – the joining church donates all assets to the lead church

Additional Issues to Consider

- Documents – study joining church's documentation to determine how they handle dissolution process
- Employees – what will happen to the employees of the joining church?
- Real property – all land, buildings, and similar physical assets need to be identified and included in the merger
- Personal property – preparation of an accurate inventory of all personal property assets of the joining church
- Restricted gifts – determine any requirements that may have been placed on the initial gift to the joining church by the donor

Personnel Changes

Perhaps the most essential, and certainly the most emotional issue involved in a church merger discussion is what will happen to the pastor, any staff, and the volunteer leadership of the joining church.

The most visible and delicate staff role is that of the Senior Pastor. There are at least four options to consider:

- No Pastor
- Pastor departs after merger approved
- Pastors become co-pastors
- Pastor becomes staff at the lead church

Every church has boards and committees of lay leaders. They have various names according to denominational polity and tradition. Often they are the most influential stakeholders who will make a big difference in the outcome of the merger. Their wisdom, relational connections, and other skills are often some of the most significant benefits that the joining church brings into the merger.

3

Part Three: Your Next Steps

How to Discern if Merging is the Right Thing

The only way a merger can truly succeed is if every step is conducted with prayer, integrity, and healthy communication. Here are 11 steps for your consideration:

- Begin with vision
- Initiate the conversation
- Define the relationship
- Build on common DNA
- Integrate unique strengths

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- Identify the differences
- Know the financial realities
- Assess all relationships
- Establish a timeline
- Do a God check
- Take a vote or survey

How to Start the Merger Conversation

Healthy mergers usually are the result of a relationship built on mutual respect and trust. As you build relationships with local pastors and other ministry partners to serve your community together, merger possibilities begin to develop. Here are 5 ways the merger conversation may begin:

- Lead Church initiates a relationship-based exploratory conversation
- Lead Church invites potential joining church pastor to join its staff and bring his church along
- Lead Church ministers to a hurting church and later asks if it could do more
- Joining Church asks for help and so Lead Church suggests idea of merger
- Joining Church pursues suitors

Working through these issues is the hard work of merger deliberations. It is a proactive step that not only helps to determine feasibility but will also preempt surprises and generate congregational confidence as you demonstrate that you have done your due diligence.

Where Do You Go from Here?

Are you sensing the “urge to merge?” If you have become convinced that a merger could be a viable option for your church, what is your next step? Here are some suggested next steps to get you started down the road toward a church merger:

- Define Reality
- Clarify purpose of church
- Assess health of church
- Do a demographic survey of region
- Assess redemptive potential of community
- Assess church landscape in community
- Study Better Together
- Find help
- Pray

Healthy, mission-driven mergers are happening in an unprecedented way today. Two churches can be *better together* through a healthy merger. Is there a church merger on your horizon?

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Recommended Resources

1. **Read** about 3 strategic alternatives to shutting a ministry down by Auxano Founder and Team Leader Will Mancini.
2. **Watch** as Better Together authors Jim Tomberlin and Warren Bird discuss their book in a series of 7, 1-2 minute videos produced by Leadership Network.
3. **Read** how Brotherhood Mutual approaches the topic of church mergers from a legal standpoint.
4. **Download** a worksheet on church mergers by Thomas Bandy.

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Go Ahead Actions for Vision Clarity

by Jim Randall

Vision Clarity Connection

“Mission-driven church mergers have tremendous potential to exponentially expand the impact of strong, vibrant churches as well as to revitalize plateaued and declining churches” – Better Together.

The authors are spot on with their assessment of the fundamental importance of having clarity first when considering a merger. Too many churches have opportunistically merged. In other words, the opportunity made itself available and the churches joined forces without thoughtfully planning and defining their purpose and future. One key to a successful merger is to first work together to clearly define your mission.

Your mission is a clear and concise statement that describes what your church is ultimately supposed to be doing. It is your compass. It's the golden thread that weaves through every idea, conversation, and action, no matter how small.

Go Ahead

So how do you lead through a mission-driven merger?

You must have a stunningly clear and articulate mission statement.

There will be one of three likely scenarios for churches that are merging. Determine which of the scenarios below describes your circumstance.

Scenario 1 – One church will have a clear mission while the second church will not have a mission.

Scenario 2 – Both churches will have mission statements.

Scenario 3 – Neither church have a mission statement.

Have the key leaders from both churches participate in the one of following exercises.

If you fit scenario 1 or 2, start by assessing any existing mission statements through five characteristics of clarity.

- The 5 C's (below) will be your filters as you move toward a decision on your mission articulation. It will be easier to align both churches around a shared mission if one of the statements is successful at making it through these five filters.
- Write each church's mission statement on a newsprint sheet or a whiteboard so everyone can see them. Under each mission statement, write these 5 words in a list: clear, concise compelling, catalytic, and contextual. Then rate each statement on a scale from 1-5 (1 is lowest; 5 is highest) in each of the five characteristics below. Write the score next to the appropriate word.
 1. **Clear:** Clear enough that an unchurched, 12-year old boy would understand it
 2. **Concise:** Concise enough to say in one breath
 3. **Compelling:** Compelling enough to make you want to say it again
 4. **Catalytic:** Catalytic enough that it reminds the listener to act
 5. **Contextual:** Does it reflect the unique local context
- Assess which statement scored highest overall. Discuss what you like best about the mission statement and how it can expand your impact through the merger.

If you fit scenario 3, you will need to craft a new mission statement for the merger churches.



Go Ahead Actions for Vision Clarity (*continued*)

by Jim Randall

Determine your A to B – The A to B structure is a helpful way to create a statement of mission. “State A” represents the people that your church is called to reach. “State B” represents what we are becoming as followers of Christ.

- Define your “State A” – Place two newsprint sheets on the wall (or use a whiteboard) and title them “State A” Have the team brainstorm a list that describes the people you are called to reach in your specific context. Record these on the sheets as you brainstorm.
- Define your “State B” – Repeat the brainstorm process above for “State B,” the persons we become as followers of Christ.
- After you’re done, compare the lists and look for any ideas that contrast meaningfully. Use these ideas to develop your mission statement. (Sometimes it’s hard to state “state A” explicitly and it can be left implicit. For example the implied “state A” of Westlake Hill’s mission: “Inviting people into God’s larger story as we follow Christ together” is “small living.” The tension between “small living” and “God’s larger story” drives the identity and missional heartbeat of the church.)
- As you work to articulate your mission statement, continue to evaluate it against the 5 C’s!

The advantage of this framework is that it can communicate movement, incarnation, process, and completion with an efficient use of words.

Think of the A to B as a before and after statement. What does an individual look like before your church accomplishes the Great Commission?

Here are some mission statement examples:

Life Church, Portland: Guiding self reliant people toward a Christ centered-lifestyle

Oak Hills Church: We live in Christ to bring God’s story to life

Bannockburn Baptist: Guiding generations to passionately follow Christ, one home at a time

Bandera Road Community Church: Helping people far from God become catalysts of spiritual and social change

Crozet Baptist Church: To encourage people in our ever-expanding community to follow Christ with ever-increasing passion

Lead strong with clarity and your church merger will go ahead!



More About Jim Randall

As Chief Management Officer and Lead Navigator for Auxano, Jim Randall has guided churches all over the country as a “vision strategist.” After serving as the primary developer of ministries at a 2000 attendee church, Jim became one of the founding officers of Auxano in 2004.

Jim’s expertise lies with developing ministries based upon clarified vision. He brings a breadth of leadership and church growth knowledge from his proficiency of coaching senior pastors and multiple church staffs in the vision arena, especially around organizational clarity, ministry alignment, and team synergy. Jim has demonstrated achievement as a strategic thinker with a unique ability to bring a group of people to a deep sense of personal ownership and passion.

His education includes a Master of Arts in Religious Education from Southwestern Baptist Theological Seminary and a B.S. in Religion from Liberty University. Jim lives in Merritt Island, FL, with his wife, Jane, and son, Jared.

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