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### Best Practices in LCMS Congregational Mergers into Multisite Ministries

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BEST PRACTICES IN LCMS CONGREGATIONAL MERGERS INTO MULTISITE  
MINISTRIES

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A Major Applied Project  
Presented to the Faculty of  
Concordia Seminary, St. Louis,  
Department of Practical Theology  
In Partial Fulfillment of the  
Requirements for the Degree of  
Doctor of Ministry

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By  
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December 2018

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Dedication:

To my wife, Janelle Hesse, without your support, encouragement and steadfast love this project would not be possible. You are a blessing to me, our family and in all you do.

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## PREFACE

It was sometime before November 2015, a member of Trinity Lutheran Church asked me, the pastor, what could be done to assist the members of a sister congregation (Christ Lutheran Church) across town. The relationship between congregations is close because of family and friendly relationships over the years. The members of Trinity Lutheran Church were concerned about a sister congregation and the challenges it was facing. The members of Trinity feared the worst, their sister congregation could close its doors.

I assured the member that the challenges of Christ Lutheran Church could not be solved long term with just the usual answers of vacancy ministry. As a pastor, I had little interest in ministering to a congregation that was at the point of closing their doors. This option would simply require more time than available becoming a distraction to Trinity Lutheran Church and not particularly beneficial to Christ Lutheran Church.

However, Christ Lutheran Church has an active early childhood care program for children infants to age four. The congregation is also located in a fairly new neighborhood that is still rapidly growing. It simply didn't make any sense to close a congregation so geographically and demographically suited to reach the community. However, years of intermittent pastoral leadership and vacancies had taken their toll on the congregation. There needed to be a new plan for something different.

In November 2015, elected leadership of Christ Lutheran Church met with members of Trinity Lutheran's pastoral office. Representing Trinity Lutheran were the pastor and family life minister who had previous history with the congregation. In the conversation of that meeting the initial idea of a merger was born. What would happen next was new and seemingly experimental for both congregations. Could a healthy church merger for multisite ministry be the answer that

both congregations needed to reignite their efforts to share the Gospel with the Amarillo community?

In the following pages we will explore the journey these congregations took together. We will explore the merger they agreed to create. We will examine the process of looking for the Best Practices in LCMS Congregational Mergers for Multisite Ministries. In the following pages we will examine how two congregations came together for sake of the Lord's mission in their community. This is not an exercise in assessing church growth. The work contained in these pages presents how two congregations transform through a church merger to become one congregation, stronger together to reach both neighborhoods in a new multisite setting.

The process and work that would ensue over the next several months would be new to everyone involved in the process. Nothing like a merger had ever been proposed or tried anywhere in the Lutheran churches of the Texas Panhandle. I invite you to continue reading and go on the journey of discovering Best Practices in LCMS Congregational Mergers into Multisite Ministries.

## ACKNOWLEDGEMENTS

First and foremost, I would like to acknowledge the blessings of our Lord and Savior, Jesus Christ. Throughout this project He has repeatedly demonstrated that He is still Lord of the Church and continues to guide it by the power of His Holy Spirit. This MAP is a result of the blessings that Jesus has provided by His grace and love for his church.

A special acknowledgment is necessary for Janelle, Caleb and Cameron (my family) whose constant support makes this work possible. Their patient sacrifice to share their husband and father with this endeavor will always be appreciated.

I would also like to acknowledge the blessings of Willene Esa, whose gifts of grammar and proof-reading skills are a special blessing. Her efforts to catch numerous typos and suggestions have been offered, all in the effort to allow me to present my best work.

I would also like to acknowledge the Rev. Dr. David Peter. Dr. Peter has been with this project since the beginning. He was there on the first day of the Pastoral Leadership Institute where this journey began. Many years later, Dr. Peter has faithfully served as an advisor and guide from the start of this MAP to its completion. I could never fully express my gratitude for his service. May Rev. Dr. David Peter continue to be a blessing for many more students in seminary training at all levels!

Finally, I would like to acknowledge the people of Trinity and Christ Lutheran congregations. They have participated in research and various members of the congregation have continually encouraged the completion of this project.

## CHRONOLOGY

Initial Inquiry and Vision for Merger	November, 2015
Merger Exploratory teams begin working.	Autumn and Winter, 2015
Articles of Partnership approved by Christ Lutheran	March 13, 2016
Articles of Partnership approved by Trinity Lutheran	April 3, 2016
Merged Implementation Team begins work	May, 2016.
Final Worship service of Christ Lutheran Church	May 8, 2016
First Worship service of newly merged congregations	May 15, 2016
SMP Candidate Ricky Black starts Fall Cohort	August, 2016
Legal merger completed with State of Texas	July 31, 2017
Relicensing of Trinity Woodlands Child care program	August 1, 2017
Pre-Kindergarten program expands to Trinity Woodlands	August 15, 2018
Trinity Lutheran Woodlands celebratory launch	November 21, 2018
First Sunday worship of Trinity Woodlands congregation	November 25, 2018.

## **COPYRIGHT ACKNOWLEDGEMENTS**

Unless otherwise noted, all Scripture citations in this document are taken from the English Standard Version of Holy Scriptures as contained in the *Lutheran Study Bible*, Rev. Edward A. Engelbrecht, General Editor, St. Louis: Concordia Publishing House, 2009.



## ABBREVIATIONS

AC	Augsburg Confession
LCMS	The Lutheran Church—Missouri Synod
LW	Luther's Works: American Edition
LWML	Lutheran Women's Missionary League
MAP	Major Applied Project
NT	New Testament
OT	Old Testament
TDNT	The Theological Dictionary of the New Testament

## **ABSTRACT**

Hesse, Brian J. “Best Practices in LCMS Congregational Mergers into Multisite Ministries.” Doctor of Ministry. Major Applied Project, Concordia Seminary, 2018. 171 pp.

In this MAP the process of a church merger is evaluated for the development of Best Practices in LCMS Congregational Mergers into Multisite Ministries. These best practices are developed with special considerations towards LCMS ecclesiology, missiology and Martin Luther’s Distinction of God’s Two Kingdoms. Best practice recommendations are included for LCMS church mergers, especially for those congregations considering multisite ministry.

## **CHAPTER ONE**

### **INTRODUCTION**

Trinity Lutheran Church is a congregation nearly 100 years old in Amarillo, Texas. This well-established ministry in the community is content and comfortable with its level of activities. This congregation was not actively seeking a new ministry effort, let alone plant another congregation. The congregation is focused on its primary mission of reaching new families with the Gospel through its work in congregational, school and child-care ministries.

In the first quarter of 2016, one of Trinity's sister congregations nearby requested a merger partnership. Christ Lutheran Church in Amarillo approached Trinity Lutheran with an opportunity to explore and merge the two congregations for a more cohesive mission advance within the community. In May 2016, the congregations formally agreed that Christ Lutheran would merge with Trinity Lutheran. Over the next year, the two congregations would embark on the process of becoming one ministry on two campuses. They would merge into a multisite model.

The purpose of this Major Applied Project (hereafter, MAP) is to evaluate the merger process that has been completed. This purpose will be more clearly defined and described below. The timing of this MAP is ideal, because the two congregations have completed the ministry merger legally. The newly merged organization will soon move to launch a new worshipping community on the site that was formally Christ Lutheran Church. Prior to this launch phase there is here an opportunity to evaluate the merger process.

## Problem Statement

Trinity Lutheran Church and her newly merged partner Trinity Lutheran Church Woodlands (formerly Christ Lutheran Church) have not evaluated what has been helpful in the merger process, so that best practices may be identified for improving upon their articles of partnership. This problem and lack of evaluation could undermine the newly merged ministry in a number of ways. The lack of evaluation with the congregation may leave staff unaware of community or congregational needs to continue a strong partnership. Without addressing this problem, the launch team that will be gathered for a new multisite launch may not have all the necessary congregational feedback to be successful. Finally, the Articles of Partnership<sup>1</sup> is a document approved by the congregation and it is to guide the congregational merger process.

## Purpose Statement

The purpose of this MAP will be to develop a best practices model for use by congregational leaders. The purpose of addressing the problem stated above and establishing some best practice concepts is that the congregation's articles of partnership can also lay the foundation for launching a new worshipping congregation that will be an extension of the merged congregation. As a new ministry launch draws closer, developing best practices are needed for several reasons. First, developing these concepts are needed to assist congregational members who might be in doubt or even critical of the new partnership and pending ministry launch. Second, the implementation of these best practices into the articles of partnership will guide the launch team and should create a stronger partnership in our desire to fulfill God's mission through this multisite approach. Finally, incorporating a "best practices" into the articles of partnership may result in useful models whereby other congregations may benefit.

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<sup>1</sup> See Appendix One.

Recently, Trinity Lutheran Church and a sister congregation nearby, Christ Lutheran Church, agreed to merge. This merger is an effort to combine congregational strengths in ministry to create a single ministry partnership that functions in a multisite model. Through the appropriate doctrinal and bibliographic research, this MAP will review how such church mergers are more than corporate mergers in the community. Through surveys and interviews with congregational leaders in the merger process, the MAP will also seek to demonstrate how this church merger has fostered a ministry partnership becoming one ministry together.

The research question at issue in this MAP is what process and practices have best facilitated two congregations becoming one merged ministry in a multisite model. Through the work of this MAP the objectives of the basic outcomes are as follows:

#### Objectives of Basic Outcomes

1. The MAP will identify theological principles that inform Lutheran congregations how mergers can strengthen ministry partnerships administratively.
2. The newly merged ministry will improve the articles of partnership based upon identified best practices.
3. The MAP will create a presentation reporting to the congregation the identified best practices and recommendations for improved articles of partnership.

#### Process

This project will begin by reviewing the merging congregations' rationale and objectives for entering a church merger process. Each congregation's exploratory committee recommended a merger partnership. Reviewing the rationale and objectives for the merger will reveal the desired outcomes both congregations have hoped to achieve through the merger. The information from both theological and literature review will provide the context for the foundational

principles that are key components to effectively facilitate church mergers. The theological and literature reviews along with their insights will shape a Lutheran perspective for the administrative structure for merging the two congregations.

Following the theological and literature review, and alongside the field research, certain administrative statistical data will be tracked. The Lutheran Church—Missouri Synod’s (LCMS) Office of Rosters and Statistics requires the tracking of worship attendance, baptized and communicant membership and membership transfers. This weekly statistical data will be collected beginning one year before the merger process in order to establish a baseline of congregational life. Statistical data will also be continually collected during the merger process and for an additional three months after the merger completion. This collection of statistical data will document the administrative aspects of congregational life reflecting trends of growth or decline as defined and tracked by the synod. The collection of this administrative data is consistent with the usual reporting of church mergers.

As the administrative statistical data is nearly completed, the field research will be done through a two-phase process of both qualitative and quantitative research with those involved from both of the pre-merger congregations. The field research will begin with quantitative research through the use of a Likert scale survey. This Likert survey will include items from the merger process allowing the congregation to evaluate whether these items were done well or clearly understood by the congregation. The inventory will include items identified in the merged congregations’ Articles of Partnership<sup>2</sup> that guide the merged ministry. This inventory, along with its informed consent requirements, will be made available to all members of both pre-merger congregations. Surveys will be mailed to homes with specific instructions and deadlines

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<sup>2</sup> See Appendix One

for completion.

Following the timely completion of the quantitative research, qualitative research will also be conducted using a focus group interview of individual volunteers from the implementation team. The qualitative interviews with focus groups will provide additional information regarding insights about the merger process as well as any available information from the quantitative research conducted. This qualitative research is necessary in identifying best practices to be pursued or pitfalls to be avoided in the merger process from a Lutheran perspective.

Upon completion of research, this MAP will then create a presentation that can be reported to the congregation. This presentation of best practice research findings will be presented based on the results of research data. The most appropriate venue for presenting this material will be in one of two places based upon congregational preference. Most likely this report will be made available to the Voter's Assembly (the supreme governing authority) of Trinity Lutheran Church. If preferred, this report could also be made to the whole congregation during regularly scheduled worship services.

#### Presuppositions

1. The merging of two congregations does not reflect the failure of one or both churches.
2. The process of merging two congregations is not the same arrangement as a dual parish, vacancy ministry, or other more common multi-congregational relationships within the synod. This MAP is not intended to determine that one is more appropriate or better than another.
3. This MAP will not examine whether the categories tracked by LCMS Office of Rosters and Statistics are the appropriate categories for measuring congregational life. The statistical categories selected for administrative reporting are the same as those required

to reflect congregational life by the LCMS.

### **Biblical and Theological Perspectives**

Speaking Biblically, there are no clear examples of two congregations merging to form one new congregation. There is not a direct parallel prescribed in Scripture for the merger model of two congregations to follow. However, Scripture does not leave us without guidance when it comes to accomplishing the ministry and mission of God in this effort. St. Paul speaks many times throughout his epistles regarding the partnership he has in the Gospel. St. Paul also speaks of the coordination individual churches share with other congregations to aide and assist each other in ministry.

Since there are no prescriptions in God's Word for such ministry activity, much of the Biblical perspective in this MAP will be treated descriptively, by examining examples of collaborative ministry in Scripture. God's Word speaks in the area of fellowship and partnership in the Gospel. Scripture also speaks of ministries sharing resources, giving mutual aid and working together. These Scriptural perspectives will inform and provide context for the theological perspectives stated below.

#### *Doctrine 1: Missio Dei*

The mission of God is one of the chief doctrines that empowers the process of a church merger to work. In review of this foundational doctrine found throughout Scripture, it can be demonstrated that the mission of God is inherently active in the lives of God's people. When a congregation begins to see its own missions in relation to God's mission of sending the Gospel to all people, this then allows the congregation to begin rethinking and realigning its ministry. The mission of God is the basic doctrine that requires and motivates congregations to be active and well-structured in their missions.



A distinction between the ministry of the congregation and the missions of the church in the community must be clear. The process of merging two congregations is not simply a corporate process. Understanding each congregation's paradigm for missions and ministry will be important for harmonizing a church merger into a unified ministry relationship. If harmonization and merger of two congregations is to be achieved, their similar understandings of missions and ministry within the church should be identified.

### Doctrine 2: The Church

The doctrine of the church must be explored, reviewed and clearly defined. Ecclesiology in the LCMS has been described in several ways and continues to be a topic of discussion in many theological circles. For the purpose of this MAP, the doctrine of the church will be an important understanding to clearly define how churches can merge. In the LCMS, a key part of ecclesiology is the autonomy and self-governing nature of each congregation. C.F.W. Walther had particular views regarding this part of LCMS ecclesiology. How two independent, self-governing congregations merge and become partners as one entity has direct implications for what it means to be a church. The external nature of the church held in tension with the true purpose of the church as defined by the Augsburg Confession will be examined to provide a balanced view of church that will serve the newly merged congregations and pending multisite model.

### Doctrine 3: Luther's Distinction of God's Two Kingdoms

This doctrine is closely related to the doctrine of the church as previously discussed. Luther's distinction of God's two kingdoms also provides helpful information regarding church mergers. To this point the primary focus of a church merger has been described merely in terms of God's right-hand kingdom or the kingdom of the church. As church mergers directly impact

ecclesiology and missiology, this is only one aspect of the church's merging activity. Another aspect of the church's merging activity happens in regards to the temporal affairs of the church. In other words, the merging congregations have significant obligations to the state and the government in any merging efforts. Luther's distinction of the two kingdoms is helpful as it reminds merging congregations that those temporal and legal obligations are part of honoring God's gift of government. Being mindful of both kingdoms in the process adds significantly to the work of accomplishing church mergers in a manner that is honorable both legally and ecclesiastically.

### **Context of Recent Research**

#### Originality

On the one hand, various ministry partnerships are nothing new. The history of the LCMS contains numerous attempts at mission planting endeavors with various ministry structures. Additionally, when Lutheranism was brought to the Texas Panhandle (the area of the merged congregations) the common district partnership of a circuit rider was used. From the earliest days of the synod, numerous dual parish relationships have also been used to provide stable mission and ministry in smaller church settings. None of these models accurately reflects the church merger model. In each of the previous examples, individual organizations shared the resources of a single pastor, but remained separate preaching stations. They remained separate congregations or organizations independent of each other.

Outside of the LCMS many non-denominational congregations have merged into multisite ministries. These mergers have followed more the corporate merger model. The non-denominational examples of church mergers and multisite ministries may provide some similarities and insights for LCMS mergers. One key difference for non-denominational

congregations is the convenience of being non-denominational. In the non-denominational setting certain theological implications can more quickly be ignored or overlooked. The merger and multisite models in these cases often support a mega-church franchise or brand recognition within a community. In this setting mergers and multisite congregations provide mega churches with a tool for rapid numerical growth. However, one similarity that can be seen from the non-denominational model is the same sense of autonomy or self-governing nature of the congregations involved. The emphasis on how two separate, self-governing congregations merge to create a new partnership remains the same. However, even within this similarity non-denominational congregations are forced to accomplish the merger without the sense of walking together that can be facilitated by being joined to the same synod.

In many respects a best practices model for LCMS mergers is overdue. With the unique polity, doctrine and current trends in the LCMS, this best practices model may be a helpful tool for many congregations in the future. There are numerous congregations within synod that remain without a permanent called clergyman serving the congregation. Meanwhile, other congregations remain stable. The statistical numbers of their church remain stable, but not necessarily growing; many of these congregations become apprehensive or apathetic in their relatively healthy, but static ministries. Congregational mergers is an untested model within Lutheran circles. An intentional examination of best practices will provide needed insights for Lutheran congregations to develop new partnerships and structures for ministry.

### Literature Review

The LCMS is not the only group of Christians pursuing church mergers and multisite ministry. Through literature review, this project will examine numerous pitfalls, helpful practices and resources that have been published regarding the church merger process. Mainstream

denominations and non-denominational congregations have been using church mergers. There are numerous resources aiding the exploration and describing how other denominations have accomplished a healthy merger process. Much of the literature on the topic of church mergers discusses specific contexts and opportunities that are favorable for church mergers to work. Along with the different contexts for mergers, the literature also explores the different motives for church mergers. In addition, some of the literature offers significant resources for assessing a congregation's readiness for merger. Reviewed literature will also describe some the best practices that have been discovered along the way from outside the LCMS. Outside the LCMS much has been written on the best practices needed for mergers and ministry partnerships to work well.

There are relatively few previous surveys or areas of research regarding church mergers, an observation also shared by Jim Tomberlin's volume. Since few surveys exist, examining what is available becomes extremely important. Leadership Network conducted a survey of 605 pastors in December 2007. This research discusses church mergers and how often they occur among Protestant churches. This survey also examined the likelihood of churches merging. This research will provide documentation to the frequency and/or likelihood that churches are using the tool of a merger in their ministry.

Again in 2011, the Leadership Network conducted an online study. In this study 430 responses among 151 churches evaluated church mergers that took place. This survey discussed the "learnings" each congregation gained through the merger process. Examining this survey will help provide understanding about the results church mergers have experienced in their new partnerships. The results of this survey have been captured in the article, "*Making Multi-Site Mergers Work.*"

An additional resource that may provide some language to the model of church mergers is Phil Stevenson's volume, *The Ripple Church*. This book is intended to be a resource to pastors and congregations as they ponder planting a new a congregation. The dynamics at work in the congregation are similar for the congregations which are working through a church merger. One section particularly helpful in this volume is Stevenson's description of the "Death and Resurrection" church planting model. In this model one church ministry site is intentionally closed in a way that honors ministry for the specific purpose of resurrecting a new and sometimes different ministry in the same location. In a merger, Stevenson's model helps provide language and imagery to the merger partnership and structure.

Additionally, Stevenson articulates that congregations of any size or stature can use these models. Much of the literature includes examples of very large or mega churches involved in church mergers. However, church mergers are not reserved for the mega churches. Stevenson's volume challenges the popular notion that you must be a large church to be a church active in planting new Gospel ministries or engaged in partnerships such as mergers.

Perhaps one of the newest resources available in the area of church mergers is the volume, *More Than Multisite: Inside Today's Methods and Models for Launching New Congregations*, produced by the Barna Research Group. The report was produced in 2016 in part from the research conducted with their *State of Pastors* research that same year. *More than Multisite* is a comprehensive and up-to-date tool assisting churches to minimize the challenges of launching new missions. This report from Barna Research Group discusses church mergers and explores ten trends in the multisite movement. It also offers insights into the roles pastors involved in mergers may have. The report also attempts to equip organizational leaders to move forward in the church merger movement.

## **Project Developmental Approach**

### Process Description

Step One: Through review of Scripture and the Lutheran Confessions, the key doctrines important to church mergers will be reviewed and explored. Specifically in the study of Scripture, key attitudes and descriptions are to be identified as useful in the church merger process. Through the study of Lutheran doctrine, the place of church mergers in ecclesiology will be investigated. Even in the unique self-governing of individual congregations of the LCMS, it will be demonstrated that church mergers can be beneficial and even necessary.

Step Two: In the literary review of this project, specific trends, attitudes and practices will be studied regarding the merging of congregations. The literary review will further describe the initial contexts for church mergers. The literature, through documentation of previous surveys, will describe the benefits which merging Lutheran congregations may experience through the church merger process.

Additionally, the statistical data of each congregation's baptized membership, communicant membership and average worship attendance will be tracked. This data will provide necessary evidence of the impact of the merger on each congregation administratively. This data will also demonstrate how mergers are completed through the church administration. This data will continue to be gathered for a period of three months after the legal completion of the merger.

Step Three: The field research will begin with quantitative research through the use of a Likert scale. The Likert scale inventory or survey will be made available to all members of the pre-merger congregations and all current members of the merged congregations, along with faculty and staff in the ministry. This quantitative research will provide the necessary feedback to evaluate which items in the merger process were done well from the perspective of the

congregations' members. The Likert inventory will provide a basis of feedback for the implementation team that facilitated the merger process. This information may provide a basis for further qualitative study with the implementation team being interviewed as the focus group.

An additional and important step in the field research will be the use of qualitative research through a focus group interview with the implementation team. This qualitative field research evaluating the merger process must be done to allow those most involved in the merger to speak about those things that best facilitated the process of the two congregations becoming one. The interviews in this segment of field research will ask questions centered around two major questions. The first set of questions will ask, "What went well?" in this merger. The second set of questions will explore, "What could have been better?" The interview questions may also include pertinent insights gathered from the quantitative Likert inventory used as previously described.

Step Four: The results of all research will be gathered to create principles of best practice for a report to be made to the congregation. These best practice principles will be organized into a digital presentation offering recommendations to further strengthen the merger partnership. Venues for this presentation will most likely be a voter's assembly meeting or perhaps a worship service. The presentation could be made during a special evening meeting, if necessary, but the information should be available to all members of the merged congregation. The information will also be helpful for any new ministry launched at the newly merged Trinity Lutheran Church Woodlands campus.

### Research Methodology

The first phase of research will be accomplished through a quantitative Likert scale. This quantitative research will be conducted with any communicate member of the congregation or

non-member staff over the age of 18 who gives a signed, informed consent for participating in the survey. This Likert scale will include items of information that are of particular interest to the focus group to be interviewed in the qualitative research to be done later. Items included on the Likert scale are aimed at helping the focus group identify what went well with the congregational merger and what could have been done better. The Likert scale is to aid in establishing which items in the process have been most helpful for the two congregations becoming one ministry. Among the numerous participants of the quantitative survey should also be elected officers of the congregation, staff members, and members of the focus group.

Following the completion of the Likert scale, there will also be some qualitative research completed in the form of interviews with the focus group. The qualitative research method for collecting information will be through a defined interview process with a focus group made up of the implementation team. The interview questions will provide the opportunity for the participant to identify what went well in the merger and what could have been done better in the merger. In some cases this qualitative research may provide a response or better understanding to items revealed in the quantitative research. These interviews will provide direct reflection, evaluation and feedback as to the best practices in the merger process.

This research methodology is selected because it provides the most recent and accurate reflection of best practices throughout the merger. In addition, it allows members of the congregation to tell the story of how they have served the Lord through this process. The interviews allow members to tell their story and celebrate what has been accomplished through the church merger.

#### Implementation Time Line

The timeline for this project is captive to the merger timeline of the project. In the specific



case of this merger, delays and roadblocks prevented the merger from being completed until July 2017. The merger completion day was originally scheduled for December 2016. This timing difference is significant, since it has delayed the timeline for evaluative reflection and launch of any new and additional ministry or worship services provided at the newly merged Trinity Lutheran Church Woodlands Campus. The extended time taken for the merger, with delays and roadblocks, may have also created additional material for reflection and evaluation needed by church members to insightfully share best practices. The anticipated ideal timeline for interviews and surveys would be autumn 2017.

Upon completion of both quantitative and qualitative research, a presentation will be prepared for reporting to the congregation. This presentation will be scheduled for winter 2017-2018. The presentation will present the best practices and make suggested recommendations for improvement upon the previously established articles of partnership.

## **Project Evaluation**

### **Findings**

The evaluation of this project will focus on two areas. First, the most important findings of this project will be the identified best practices that come out of implementing a church merger. Both the qualitative focus group interviews and the quantitative survey will provide the raw data for the basis of these findings. The second source of evaluation will be the merger's impact on the statistical participation of the congregation. The examination of the statistical data will inform the merger's impact on the ministry and life of the newly merged congregation as a whole. The findings as summarized above will be included in the report to the congregation. These findings will also serve as the basis for recommendations made to the newly merged congregation.

## Expectations

The theological and bibliographic research of this project will provide several expectations. First, it can be expected through theological research that Scripture will reveal and provide emphasis for ministry partnerships that support consideration of church mergers. Second, through the theological application of these Biblical principles, it can be expected that church mergers will enhance our understanding of church polity and ministry. It can also be expected that church mergers are complementary to Lutheran doctrine and are not in violation of it. The third expectation coming through bibliographic research is that church mergers have the potential to provide strength to both organizations involved in the church merger. While much bibliographic research comes from outside Lutheran tradition and doctrine, bibliographic evidence suggests that both merging organizations benefit when best practices of mergers are followed.

Through the field research phase of this project there is an expectation that the basic outcome of best practices will be provided out of clear reflection from those most involved in the merger. There is also an expectation that the church merger has little negative impact, if any, on the statistical data of the congregations involved. Finally, another expectation is that this project will provide a concise and clear report to the congregation about the benefits and best practices of their church merger.

In closing, this opening chapter is meant to provide the introduction and overview of the MAP as a whole. This project is being completed primarily to benefit the people of the newly merged Trinity Lutheran Church, which is engaging ministry on two campuses. The incredible opportunities and responsibilities of this ministry endeavor do not leave much time for theological, bibliographical, or evaluative reflection on this process. Through this MAP these reflections can take place and serve this congregation in future ministry. It may also serve other

congregations in similar ministry. Any benefits to the congregation or others through this MAP are by God's grace and to Him should all glory be given.

## CHAPTER TWO

### BIBLICAL FOUNDATIONS

There is no clear Biblical example of two congregations merging into one multisite ministry. The Scriptures do not provide us with a Biblical mandate or prescription performing congregational mergers. In fact, descriptions of congregational mergers in the Scriptures are non-existent as well. Scripture does speak to how God's people should carry out ministry in congregational life. The Scriptures give us many references to keep in mind if church mergers are to be God-pleasing ministries that communicate the Gospel of Jesus Christ. In this chapter we will explore key themes from the Old and New Testaments. Then with these New Testament ideas in mind, theological perspectives in the Mission of God (*Missio Dei*), The Church and the Doctrine of Martin Luther's Two Kingdoms will provide a more solid theological foundation for navigating the complex process of congregational mergers.

Looking to the Scriptures, one of the most important elements in church mergers will be a spirit of unity that must exist in the two ministries that agree to merge together. King David writes:

Behold, how good and pleasant it is when brothers dwell in unity! It is like the precious oil on the head, running down on the beard, on the beard of Aaron, running down on the collar of his robes! It is like the dew of Hermon, which falls on the mountains of Zion! For there the LORD has commanded the blessing, life forevermore (Ps. 133:1–3).

King David points us to be unified as brothers and as God's people. David speaks of this unity as both precious oil and life-giving dew. The unity of the two ministries is crucial to every congregational merger. As King David writes, it is in this very unity of the brothers that the LORD has located His blessing. Unity in the church is crucial to congregational life.

The Christian church today is not primarily Jewish as it was in King David's day. Still there is a divine reality of blessing and eternal life that is expressed in the unity that God provides His people. Today, the Christian church is now much more diverse. As Jim Tomberlin and Warren Bird consider Psalm 133 they state, "The entire drama of the New Testament is the story of God bringing diverse groups together toward that divine reality."<sup>1</sup>

As we consider the Scriptural support for unity, look no further than what takes place in the New Testament. St. Paul also speaks of the unity of the brothers in the Christian faith:

But now in Christ Jesus you who once were far off have been brought near by the blood of Christ. For he himself is our peace, who has made us both one and has broken down in his flesh the dividing wall of hostility by abolishing the law of commandments expressed in ordinances, that he might create in himself one new man in place of the two, so making peace, and might reconcile us both to God in one body through the cross, thereby killing the hostility (Eph. 2:13–15).

As St. Paul writes to the Ephesians, he describes the merger of the Jews and Gentiles into the one body of Christ. St. Paul compares the merger of these two groups of people with the same reconciliation that takes place between God and man in Christ. In Matthew Henry's Commentary we read:

He made peace by the sacrifice of himself; and came to reconcile, 1. Jews and Gentiles to each other. He *made both one*, by reconciling these two divisions of men, who were wont to malign, to hate, and to reproach each other before. He *broke down the middle wall of partition*, the ceremonial law that made the great feud, and was the badge of the Jews' peculiarity, called *the partition-wall* by way of allusion to the partition in the temple, which separated the court of the Gentiles from that into which the Jews only had liberty to enter. Thus *he abolished in his flesh the enmity*, Eph. 2:15.<sup>2</sup>

St. Paul describes an incredible unity that Christ intends for His church. Jesus is the one that has reconciled us to God. Therefore, Jesus is also the source of reconciliation as different

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<sup>1</sup> Jim Tomberlin and Warren Bird, *Better Together: Making Church Mergers Work* (San Francisco: Jossey-Bass, 2012), 8.

<sup>2</sup> Matthew Henry, *Matthew Henry's Commentary on the Whole Bible: Volume VI: Acts to Revelation* (New York: Revell, 1935), Ephesians 2.

groups of people choose to merge into His church. This reconciling and merging action of Christ bringing us into His church is at the very heart of the Gospel that only He could deliver.

Numerous other passages proclaim this truth repeatedly. One might be quick to point out that this is hardly prescriptive for congregational mergers. However, St. Paul's message in Ephesians is a clear example of how God desires different groups of people to come together in merger for God's own work.

St. Paul advances another concept in the New Testament that must also be mindful for any best practice in church mergers. The New Testament speaks of *koinonia*, a concept that is critical in the life of every gathering of God's people. This term in Greek is used to articulate a fellowship or partnership held in common. In the New Testament this term has been defined as, "to share with someone in something."<sup>3</sup>

The term *koinonia* is often translated as fellowship or partnership. As a term that applies numerous times in the New Testament to communicate several ideas about fellowship and partnership. In Luke 5:10, the *koinonia* is used to describe the partnership that James and John have with Simon in a fishing business. In this instance the term might indicate a business partnership. Today this would be considered a very formal arrangement in the world of corporate partnerships. When we look to churches and the fellowship and partnership they share, this sort of corporate partnership is not generally under consideration.

The term *koinonia* is also used as a distinctive term in our relationship with Christ. St. Paul uses this term to communicate the special nature of our faith in Christ giving us fellowship. For example, in the opening verses of 1 Corinthians we read, "God is faithful, by whom you were

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<sup>3</sup> Gerhard Kittel ed., *The Theological Dictionary of the New Testament Volume III*. (Grand Rapids: Eerdmans, 1995), 804.

called into fellowship of His Son, Jesus Christ our Lord” (1 Cor. 1:9). This special usage of *koinonia* is explained in *The Theological Dictionary of the New Testament* as it states:

According to I C. 1:9 Christians are called to fellowship (participation with the Son. They are lifted up to be His fellows. They enter into a spiritual communion with the risen Lord. The description of the Christ relationship is to be distinguished from Paul’s distinctive in Christ and also from his common image of the believer as a member in the body of Christ, 1 C. 12:12 ff ... Since there is no question of mystical absorption in Christ, this participation in Christ and fellowship with Him arise only through faith, which implies the identification of our life with His.<sup>4</sup>

It is in this sense that St. Paul speaks of the partnership that he has in the Gospel with the Philippian Christians. This is a partnership for which he gives thanks in prayer and values in his ministry. It is also a partnership that necessarily changes and shapes the relationships and behaviors of God’s people. The partnership in the Gospel for which St. Paul gives thanks is the very fellowship that becomes foundational for life in the Philippian church. Gordon Fee says:

Every word spoken and every deed done in behalf of the Gospel from the moment of their conversion(s) to the present, including their gift to Paul, are thus “your partnership in the furtherance of the Gospel from the first day until now.” That this is Paul’s primary intent seems corroborated by the otherwise curious participial clause that follows (v. 6).<sup>5</sup>

As stated earlier, the *koinonia* or partnership in the Gospel is a gift from Christ and is delivered to us by faith. When the work of the Gospel brings us into fellowship with Christ, it also inherently provides us a partnership with others. This great merging effect in the lives of God’s people sets the stage for us to be joined in God’s mission.

### **Doctrine One: *Missio Dei***

There are numerous examples of God’s mission in our world. In this section we will

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<sup>4</sup> Kittel, *TDNT* 3: 804.

<sup>5</sup> Gordon D. Fee, *The New International Commentary on the New Testament: Paul’s Letter to the Philippians* (Grand Rapids: Eerdmans, 1995), 84–85.

discuss the Mission of God (*missio Dei*) and how church mergers are a consistent part of that mission. God's mission to His created people continues, and church mergers are emerging as an important part of God's mission.

The Christian faith is inherently at its core the result of a certain mission that God has launched on creation. In fact, creation itself could be seen as God on a mission. In creation we see how God deliberately creates all that exists. On each of the six days of creation, God creates according to a plan and deliberately creates everything calling it "good." Creation is an example of God on a mission. The mission of creation finishes with a climactic day six declaration that everything is "very good," followed by a day of Sabbath rest. God is a mission focused God.

Because our God is a mission-focused God, mission is at the very heart of Christianity. This concept we will discuss more below. First, it is important to note why mission is at the heart of Christianity. There are at least three important reasons why mission is at the heart of Christianity. First, and the foremost, reason why mission is at the heart of Christianity is because God designed it that way. Scripture declares to us that God desires all people to know the truth and be saved. Scripture states, "This is good, and it is pleasing in the sight of God our Savior, who desires all people to be saved and to come to the knowledge of the truth" (I Tim. 2:3-4). It has already been demonstrated from the very beginning how our God is a mission-focused God. Mission flows from the heart of God. Throughout the Scriptures it can be seen how God has focused on mission to carry out His work in this world. The selection of Noah, Abraham and Moses by God were done for the purpose of a specific mission. Through these men and the rest of the patriarchs, we see God on a mission. God did not stop at ancient history. Throughout the rest of the Old Testament God would call prophets, judges and kings to carry out missions focused squarely on carrying out God's will and making known His promise. This action would



continue in the New Testament. The ministry of John the Baptist was a mission-focused ministry from God. The incarnation, ascension and return of Jesus Christ are a mission from God to save His people. All of these examples explain why mission is at the very core of faith in the true God.

Second, mission is at the heart of Christianity because the faith of the Christian church cannot die. We read in Scripture, “And I tell you, you are Peter, and on this rock I will build my church, and the gates of hell shall not prevail against it. I will give you the keys of the kingdom of heaven, and whatever you bind on earth shall be bound in heaven, and whatever you loose on earth shall be loosed in heaven” (Matt. 16:18–19). Despite the assurances our Lord offers about the faith, in certain contexts especially in the United States, Christianity appears to be declining. Within The Lutheran Church—Missouri Synod (LCMS), membership has been declining for decades. Any LCMS pastor serving today under the age of 30 must face the reality that his church body has been declining his entire life. Despite the dismal reflections, mission remains at the heart of Christianity because our Lord has promised that the faith will continue until His return at the end of time.

Many Christians would like to think that being part of God’s mission is simply discerning which way the Spirit is moving them. This is indeed an important aspect of missions’ activity. However, many Christians have unsuccessfully launched out into frustrating endeavors and chaotic attempts in missions, acting only on an impulse they believed was from the Holy Spirit. Even the disciples had a waiting period after the ascension of Jesus where they were committed to prayer before the Spirit moved them at Pentecost. The prompting of the Spirit is core to missions; the disciples also model for us that prayer is inseparable to mission.

Helping to clarify the subjectivity of mission work, David Bosch distinguishes the

difference between mission (singular) and missions (plural). It is a helpful distinction to make, one that has been attempted to be maintained in this paper. Bosch writes:

We have to distinguish between mission (singular) and missions (plural). The first refers primarily to the *missio Dei* (God's mission), that is, God's self-revelation as the one who loves the world, God's involvement in and with the world, the nature and activity of God, which embraces both the church and the world, and in which the church is privileged to participate... Missions (the *missiones ecclesiae*: the missionary ventures of the church), refer to particular forms, related to specific times, places, or needs of participation in the *missio Dei*.<sup>6</sup>

In other words, when referring to the activities of church bodies, congregations or even individual Christians, these should be referred to as “missions” within God’s “mission.” This is a helpful distinction as we continue to focus on God’s “*missio Dei*.” This distinction is one that Bosch maintains throughout his book as he outlines the various paradigms for mission. The specific missionary paradigms will be briefly reviewed in a later section of this paper. It is a distinction that helps remind us that our missions can be diverse; our missions can have great variety. Our missions can use different strategies and operate in different contexts. However, one objective aspect to our missions is that they must be part of God’s mission.

There is a creative tension that exists between mission and missions when Christ’s church becomes involved. Bosch describes this tension:

At one end of the spectrum, the church perceives itself to be the sole bearer of a message of salvation on which it has a monopoly; at the other end, the church views itself, at most, as an illustration—in word and deed—of God’s involvement with the world. Where one chooses the first model, the church is seen as a partial realization of God’s reign on earth, and mission as that activity through which individual converts are transferred from eternal death to life. Where one opts for the alternative perception, the church is, at best, only a pointer to the way God acts in respect of the world, and mission is viewed as a contribution toward the humanization of society—a

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<sup>6</sup> David J. Bosch, *Transforming Mission: Paradigm Shifts in Theology of Mission (20<sup>th</sup> Anniversary Edition)* (Maryknoll, NY: Orbis, 2011), Introduction, Location 594, Kindle.

process in which the church may perhaps be involved in the role of consciousnessraiser.<sup>7</sup>

Generally speaking, Lutherans love theological tension. Lutherans often strive to keep theological tensions in place as helpful and creative expressions of what God is doing in our lives. Lutherans tend to let open questions remain open. In the spectrum offered by Bosch, the tension is one that is difficult to maintain in a creative way. Bosch reviews and offers several reflections about this tension in both Catholic and Protestant traditions. Catholicism has certainly gravitated toward the first end of the spectrum, where the church perceives itself as the sole bearer of the salvation message. Protestants, on the other hand, have steadily moved towards the church being in her missionary role as consciousness raiser for our society.

As Bosch describes the hazards of moving towards one end of the spectrum or the other, he writes, “The first pattern, then, robs the gospel of its ethical thrust; the second, however, robs it of its soteriological depth.”<sup>8</sup> In other words, if the church has a monopoly on the message of salvation, it can force people to do whatever the church wishes. Over the course of history, we have seen how this approach can lead to abusive theology and even needless bloodshed in the name of the church. However, when the Gospel is robbed of its soteriological depth, everyone ends up being basically a good person who simply needs to find the right direction towards God. If the church is only to raise the consciousness of our world, the Gospel message is at risk of being lost altogether. In our modern times the church is already labeled as too political, too power hungry, too homophobic. All of these labels are a result of the church trying to be the consciousness raiser of the world.

The tensions, described by Bosch need to be kept in tension. The tension is not meant to be

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<sup>7</sup> Bosch, *Transforming Mission*, 372.

<sup>8</sup> Bosch, *Transforming Mission*, 373.

resolved in any way. The tension is to be kept in a useful and creative manner, rather than the destructive manners described above. As for the identity of this creative tension, Bosch writes,

There is, thus, a legitimate concern for the inalienable identity of the church and there should not be any premature amalgamation and confusion between it and the world. A witnessing and serving church ‘can only exist when she is intensely driven by the Spirit. She can give only in the measure that she herself receives.’<sup>9</sup>

Yes, the church and world must maintain their separate identities, for the two can hardly be one.

From a Lutheran perspective, the church is in the world, but not of it. The church needs to be active in the world without adopting the patterns or principles of the world. Lutherans must never forget that world is identified as one of the three evil powers (the other two being Satan and our own sinful nature) that lead us into sin. From a Lutheran perspective, the church must rely on the Spirit. Fortunately, it is a Lutheran perspective that uniquely identifies the work of the Spirit in the means of grace found under the Word and Sacraments. These means of grace have been given to the church, and the church gives what she, as the bride of Christ, has been given. These gifts remain at the very core of the Spirit’s movement among the church. While the church may be given so many additional Spirit-driven opportunities in this world, the means of grace remain the core.

With the Spirit-driven means of grace at the core of Gospel focused missions, Lutherans are ready and equipped. Lutherans within a good, responsible theological manner can employ a variety of paradigms and navigate the ever changing landscape of missions. As Stetzer and Hesselgrave write, “Oprah can build schools, Madonna can sponsor orphanages, and Bill Gates can promote global health, but only the church is entrusted with the apostolic role of Gospel proclamation whereby people are brought to the foot of the cross to ‘glorify God for His mercy’

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<sup>9</sup> Bosch, *Transforming Mission*, 377.

(Rom. 15:9).”<sup>10</sup> The Lutheran church will remain focused on bringing people of the world to the foot of the cross.

There can be no debate among Christians that the *missio Dei* expressed in our various missions is a crucial component to our lives as God’s people. It is incompatible with Scripture and Christianity’s nature for God’s people not to be engaged in various missions consistent with God’s mission in the world. Yet many Christian individuals, groups of Christians and even whole congregations struggle to be active in missions. They struggle with apprehensions, strategies and even allocating resources to missions. It must be assumed a congregation will truly struggle with these obstacles. Every pastor is familiar with congregations that choose not to struggle with their apprehensions. In the natural world, congregations seem to never struggle with too much money or too many resources. Instead, many congregations fear that they threaten their own survival if they allocate resources into missions.

God’s *missio Dei* continually beckons us to be engaged because God’s mission will continue. For these reasons, best practices in church mergers are necessary and perhaps required as they seek to meet many of the challenges stated above. As we will see in the next chapter, many church mergers are being created to facilitate greater participation in God’s mission.

## **Doctrine Two: The Church**

Another important doctrine for consideration in church mergers is the doctrine of the church itself. Church mergers inherently pose challenges to an LCMS understanding of “church.” This section will examine the doctrine of the church and its theological implications for church mergers. We can we begin to see how church mergers fit within Lutheranism only

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<sup>10</sup> David J. Hesselgrave, and Ed Stetzer, *MissionShift: Global Issues in the Third Millennium*. (Nashville: B&H, 2010), 217.

with a clear understanding of Lutheran ecclesiology. A proper understanding of the theological tensions in Lutheran ecclesiology will help us understand that church mergers can be a blessing to the church rather than a threat to its identity.

As we explore Lutheran ecclesiology, we will do so in three parts. First, a definition of exactly what is “church” will be explored as it has come to be known in the LCMS. Second, how does this understanding of church create both positive and negative impacts for church mergers? Finally, with a theological framework for understanding the nature of church, the elements of church necessary for a merger can be explored.

Attempting a definition of church can be daunting since we use the term church in so many ways. In the Apostle’s Creed we confess that we believe in “the holy Christian church.” On the most fundamental level, pastors have attempted to teach the concept of church to catechism students young and old. Recently the LCMS published an updated version of *Luther’s Small Catechism and Explanation*. In this new revision the concept and explanation of “church” has been greatly expanded around the concept of a community. The explanation to the catechism states, “While the word, *Church*, properly speaking, refers to all those who believe in Christ, it is also used in other ways (such as a building, a congregation, a denomination). The word *church* is used for such things because confessing Christians are found within them.”<sup>11</sup> The LCMS catechism recognizes the flexibility of the usage this word “church” has in the language of Christians everywhere.

It is perhaps this flexibility of the word “church” that has prompted LCMS editors to expand the section in the catechism on the understanding of “church” by describing it as a

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<sup>11</sup> The Lutheran Church—Missouri Synod, *An Explanation of Luther’s Small Catechism* (St. Louis: Concordia, 2017), 207.

community. The newly expanded section speaks about this community in four ways.

- A. Christ is the Head of the Church, and so it is called the “Christian” Church.
- B. The Church is the only community in the world in which God “daily and richly” forgives my sins and the sins of all believers. Therefore it is called “holy” and the “communion of saints.”
- C. Only the Church is founded on the testimony of Jesus’ apostles, whose witness to His teaching, work, and saving death and resurrection is preserved in the Holy Scriptures and to be proclaimed to all nations. There it is called “apostolic.”
- D. Therefore, the Church is one—the only community in which there is salvation, for it is the gathering of all who believe in Jesus Christ, who comes to them in His Word and Sacraments.<sup>12</sup>

This definition in the catechism does well to describe and explain why the Church is called holy and apostolic. The catechism rightly emphasizes church as a community rather than a building or bureaucracy. This basic definition is sufficient for most discussions among catechism students and members of the church because the “community” in question is implied by their context. Absent from the definition is any understanding of local congregations as a community. However, simply calling the church a community does not adequately define what the church is, as there are many kinds of communities. To achieve a theological framework for considering church mergers more information is necessary.

The Augsburg Confession clearly shapes what is written and quoted above from the *Explanation of Luther’s Small Catechism*. The Augsburg Confession’s definition of the church is helpful for two reasons. First, it is more official than the explanation section of *Luther’s Small Catechism*. The Augsburg Confession is one of the first official statements of Lutheran understanding about the faith. Second, the Augsburg Confession helps us understand that not all communities of Christians are the same. The Augsburg Confession states in Article VII:

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<sup>12</sup> The Lutheran Church—Missouri Synod, *Explanation of Luther’s Small Catechism*, 207–8.

Likewise, they teach that one holy church will remain forever. The church is the assembly of saints in which the gospel is taught purely and the sacraments are administered rightly. And it is enough for the true unity of the church to agree concerning the teaching of the gospel and the administration of the sacraments. It is not necessary that human traditions, rites or ceremonies instituted by human beings be alike everywhere. As Paul says [Eph. 4:5, 6]: ‘One faith, one baptism, one God and Father of all’<sup>13</sup>

In Article VII, Melanchthon was not attempting to create a new church or even a new ecclesiology. The doctrine of the church for Luther and Melanchthon was not being defined in an effort to remake the church. Robert Kolb, one of the principal editors for the Augsburg Confession, states, “Article VII exhibits Melanchthon’s skill at combining his and Luther’s theological concerns with language designed to make a decisive case to the emperor that Luther’s reform program did not carry the Wittenberg theologians beyond the pale of the church, as their Roman Catholic foes were charging.”<sup>14</sup>

Article VII affirms a definition of church that was meant to continue the faithful notion that the church is ultimately a gathering of believers around the Gospel. However, by the time the Augsburg Confession had been presented, the church had already manifested itself into a different role. Leading up to the presentation of the Augsburg Confession, the church was officially a structure and not a gathering of people. Kolb explains, “On the official level, it had become a religion in which a question of polity defined the church, not as a people of God but rather as the structure of following Christ in submission to his vicar, the bishop of Rome.” Kolb goes on to state, “Luther and Melanchthon believed that the church was instead a creation of God’s Word, his identifying himself and his human creatures through the message of the

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<sup>13</sup> Robert Kolb and Timothy J. Wengert eds., *The Book of Concord: The Confessions of the Evangelical Lutheran Church* (Minneapolis: Fortress, 2000), 43.

<sup>14</sup> Robert Kolb, “Sheep and the Voice of the Shepherd: The Ecclesiology of the Lutheran Confessional Writings,” *Concordia Journal* 36, no. 4 (Fall 2010): 328.



prophets and apostles, as given in Holy Scripture.”<sup>15</sup>

To this day, as demonstrated by *Luther’s Small Catechism* and the Augsburg Confession along with many of our other confessional statements, Lutherans still confess that the church is a creation of God’s Word. Despite Luther and Melancthon’s efforts to not create a new church or move beyond the church, we have seen dramatic changes to the idea of church and what it means relationally for God’s people. A Lutheran ecclesiology is challenging and has seen additional changes even beyond what Luther and Melancthon envisioned.

In understanding a Lutheran ecclesiology for church mergers, it is essential to understand how thoughts have changed regarding the Doctrine of the Church. A church merger will inevitably change some aspects of church polity. Additionally, it may also change how the concept of church is viewed among members. Much has been written about the challenges of Lutheran ecclesiology and even the Americanization of it. Yet with all of these changes, one might think Lutherans are rather weak or loose in their understanding of the church. Charles Arand wrote, “Others have noted that Lutherans travel light on ecclesiology.”<sup>16</sup> Arand does not make this comment from a place of undermining the Doctrine of the Church, but a desire to help us understand crucial elements and starting points in ecclesiology.

At the heart of Article VII of the Augsburg Confession is the tension between the structural institution of the church that was present in Luther’s day and the location of the church in the Gospel and sacraments. In confessional Lutheranism there is always a tension between church function and church polity or structures. This was a tension that C.F.W. Walther recognized as the LCMS was brought to fruition in a religiously pluralistic new world of the United States. In

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<sup>15</sup> Kolb, “Sheep and the Voice of the Shepherd”, 328–29.

<sup>16</sup> Charles P. Arand, “What Are Ecclesiologicaly Challenged Lutherans To Do? Starting Points for a Lutheran Ecclesiology,” *Concordia Journal* 34, no. 3 (July 2008): 157.

an article tracking the Americanization of Walther's Doctrine we read:

Walther's doctrine of the church was distinctive in that it separated the understanding of the true nature of the church from church polity. Because of the freedom of religion afforded in the United States, Walther had the liberty to separate doctrine and polity. The occasion that precipitated this development was not so much the American environment, but rather a struggle amongst the Saxon immigrants themselves.<sup>17</sup>

John Wohlrabe carefully accounts the history, challenges and issues that faced Walther and the birth of the LCMS. The tension that Walther holds has been foundational to the Doctrine of the Church in the LCMS and remains so still today. Wohlrabe concludes:

Walther's doctrine of the church grew directly out of his experiences: the Saxon immigration, the colonist's experiences with their leader Martin Stephan, the Altenburg Debate, and the controversies with J.A.A. Grabau of the Buffalo Synod, and J.K.W. Loehe in Germany. Yet his doctrine of the church was based on his understanding of Scripture, the Lutheran Confessions, and distinguished church fathers. The freedom of religion provided in America allowed Walther to distinguish the doctrine of the church from church polity.<sup>18</sup>

Today when we examine the state of church in the LCMS many are still tempted to believe that the doctrine of the church is only centered in the faithful teaching of the Gospel and right administration of the sacraments. Still others believe and stress the importance of the LCMS Church institutionally placing emphasis on polity. As this tension still exists in the church today, the dominate view is that the institutional church is less important. Repeatedly, Lutheran theologians note that, "Scripture does not prove anywhere that a certain external church organization has been, or is to be established."<sup>19</sup> Yet the external church is still important and necessary for the purpose of sharing this faith and bringing others into the life of the church.

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<sup>17</sup> John C. Wohlrabe, Jr., "The Americanization of Walther's Doctrine of the Church," *Concordia Theological Quarterly* 52 no. 1 (January, 1988): 8.

<sup>18</sup> Wohlrabe, "Walther's Doctrine of the Church," 18.

<sup>19</sup> Eugene F. Klug, "Luther on the Church," *Concordia Theological Quarterly* 47 no. 3 (July, 1983): 194.

Arand states, “Individual persons do not come to faith apart from contact with the church.”<sup>20</sup>

Arand draws this conclusion from the definition of “church” stated as, “The church is both chronologically and logically antecedent to the individual Christian life and to the existence of particular congregations.”<sup>21</sup> Arand rightly states, “The church gives birth to new Christians.”<sup>22</sup>

The external polity and structures of the church are important. In order for a physical church to be church it must be giving birth to new Christians. External churches, congregations and other church structures must facilitate and provide service to the teaching of the Gospel and the administration of the sacraments.

As the church merger proceeds towards a multisite setting, a balanced doctrine of the church is necessary. The newly merged organization must be a church structure that proclaims the Gospel and administers the sacraments faithfully, while also honoring the relationship of what will become a strong trans-congregational relationship in its external structure within its community setting. Traditionally speaking, LCMS congregations have regarded themselves independent of each other. Frequently, many LCMS pastors and Lutheran Christians will claim their congregation are autonomous. This idea has its root in Article VII of the LCMS

Constitution which states:

1. In its relation to its members the Synod is not an ecclesiastical government exercising legislative or coercive powers, and with respect to the individual congregation’s right to self-government it is but an advisory body. Accordingly, no resolution of the Synod imposing anything upon the individual congregation is of binding force if it is not in accordance with the Word of God or if it appears to be inexpedient as far as the condition of a congregation is concerned.

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<sup>20</sup> Charles P. Arand, “What Are Ecclesiologically Challenged Lutherans To Do? Starting Points for a Lutheran Ecclesiology,” *Concordia Journal* 34, no. 1 (July 2008): 160.

<sup>21</sup> Martin Marty, *The Hidden Discipline* (St. Louis: Concordia, 1962) 59.

<sup>22</sup> Arand, “Ecclesiologically Challenged Lutherans,” 160.

2. Membership of a congregation in the Synod gives the Synod no equity in the property of the congregation.<sup>23</sup>

Upon careful examination of Article VII of the LCMS Constitution, the term autonomous is never used. The article does state that individual congregations have a right “to self-government,” but this is not to say that a congregation should only be concerned with itself. Congregations should not overlook their trans-congregational relationships such as membership in the LCMS and other relationship opportunities.

This trend of congregations and church entities has been a long standing problem in the LCMS. Rev. John C. Wille, South Wisconsin District President, describes it well when he writes:

From a slightly different angle, it might appear that a theology of what might be called crass individualism of our congregations has crept its way into our practice. It is easy for congregations to consider themselves as independent franchises, something akin to McDonald’s or Culver’s with franchise fees. Sometimes we regard our congregations as if they were independent contractors who merely associate with others when it is advantageous, when we get something for ourselves or we ask, “What’s in it for me?” It affects the way that we think about church. It affects the way that we “do” church. It affects the way that we “live” church. It adversely affects the way in which we work together.

Too often I have heard God’s people and pastors remark that our congregations are independent, sovereign, or autonomous. Too often I hear pastors and congregational leaders say that they don’t really need the “synod” (whatever synod is and whatever that means). Too often I see pastors and congregational leaders cut themselves off from their brothers and sisters in other congregations for various reasons. That is played out as congregations and pastors head in their own directions, doing what is right in their own eyes, with a lack of accountability to their fellow Christians in other LCMS congregations. Sometimes that is played out in the way that we support missions heading off in our own direction. There are too many disappointing stories on that topic. And the whole body suffers.<sup>24</sup>

President Wille captures the climate of the synod describing clearly that we have placed too little attention to the external structures and polity that facilitates our faithful efforts to be church.

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<sup>23</sup> *Handbook: 2016 Constitution, Bylaws, and Articles of Incorporation as Amended by the 2016 LCMS Convention 10-14 July 2016*, St. Louis: The Lutheran Church—Missouri Synod, 2016, 13–14.

<sup>24</sup> Rev. John C. Wille, “*DP Vantage Point: Saturday, March 5, 2011*,” LCMS South Wisconsin District, accessed January 27, 2018, [http://swd.lcms.org/wp-content/uploads/2014/03/2011-03-05\\_DP\\_Vantage\\_Point.pdf](http://swd.lcms.org/wp-content/uploads/2014/03/2011-03-05_DP_Vantage_Point.pdf), 1.

The external structures are designed as self-government as stated in LCMS Constitution, Article VII. However, self-government is in no way meant to mean abandonment of the larger trans-congregational church relationships that still exist for the purpose of supporting the whole body.

Congregations must not divorce trans-congregational relationships from our understanding and doctrine of the church. As Jeffrey Kloha writes,

Although little specific is said, and even less commanded, regarding the structures of the trans-congregational church in the NT, the larger church beyond the local congregation is not free to organize itself in any manner it chooses. Its structures must reflect and contribute to its life as genuine church.<sup>25</sup>

Kloha demonstrates the trans-congregational relationships a church has are important and must also serve the teaching of the Gospel and administration of the sacraments. Kloha suggests four reasons why trans-congregational relationships are important. First he states, “The most overlooked aspect of the life of the NT church is the fostering and maintaining for relationships among geographically distant congregations.”<sup>26</sup>

In the context of this MAP, Trinity Lutheran is the largest congregation in the Texas Panhandle Circuit. Trinity is the only Lutheran congregation within more than 350 miles offering similar ministries. No other Lutheran congregations in this area are providing ministry through church, school and child development centers. Other Lutheran congregations in the circuit are less than half the size of Trinity. The experience of maintaining ministry relationships among geographically distant congregations has become crucial for the vitality of the ministry. This valued trans-congregational quality can provide strength to the church merger process.

Kloha’s second trans-congregational aspect is, “The life of the NT church was the

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<sup>25</sup> Jeffrey Kloha, “The Trans-Congregational Church in the New Testament,” *Concordia Journal* 34 no. 3 (July, 2008): 186.

<sup>26</sup> Kloha, “The Trans-Congregational Church” 185.

relationship among local “house churches” in a given city. They shared letters with each other, gathered for worship and celebration of the Lord’s Supper together and jointly sent out missionaries.”<sup>27</sup> This second aspect of trans-congregational relationships could be one of the most important when considering a congregational merger. The two merging congregations should be able to worship together, celebrate the Lord’s Supper and work jointly. A church merger would otherwise be doomed to fail if the two merging congregations cannot work jointly.

Working jointly in a church merger poses the greatest opportunities for Lutherans to grow in their understanding of ecclesiology, especially in regards to the current climate of trans-congregational relationships. Frequently Lutherans have reacted in criticism of how other congregations work together. Martin Noland writes,

In my opinion, the ‘confessional Lutherans’ have not seen growth primarily because of four factors. These four factors are things that the Evangelicals have done, that we confessional Lutherans have refused to do. The confessional Lutheran refusal to follow Evangelical practices in these matters is commendable. I would not have these synods do otherwise. The LCMS, WELS and ELS have been faithful to their beliefs, their confessions, and the Scriptures by refusing to do these four things.<sup>28</sup>

The four factors Noland rejects are practices that confessional Lutherans have clear doctrinal, written statements regarding that are based on God’s Word. Just to be clear, Noland shows the wrestling that takes place in Lutheranism regarding decline, lack of growth and other issues facing the church. His concern is best expressed when he writes, “What should the ‘confessional Lutherans’ do about this? Imitating Evangelical worship practices, sheep-stealing, accepting charismatic or unionistic practices, or any other Evangelical practices or theology will only further erode the membership of ‘confessional Lutheran’ churches. These are not options

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<sup>27</sup> Kloha, “The Trans-Congregational Church” 185.

<sup>28</sup> Martin Noland, “Why Lutheran Church – Missouri Synod and Its Kin Have Declined in Membership and What To Do About It,” *Logia: A Journal of Lutheran Theology*, April 20, 2016, accessed: Feb. 5, 2018.

for us.”<sup>29</sup>

Noland faithfully expresses the struggle within Lutheranism. Clear doctrines on unionism and worship practices have been too limiting to the understanding of trans-congregational relationships in the New Testament. Lutherans have spent too much time commending each other for faithfulness to ‘confessional Lutheranism’ that we have discredited or down-played the Biblical importance of trans-congregational relationships. Best practices in church mergers within a Lutheran context represent a significant effort to reassert biblically faithful trans-congregational relationships in a manner that is faithful to Lutheran doctrine.

Third, Kloha states, “the council in Jerusalem (Acts 15) and the collection for the church there, as described in Paul’s letters and Acts 20, show that the local churches participated in shared mission and work.”<sup>30</sup> Again, in the context of this MAP, the two merging congregations have a common passion for children and education ministries. Both congregations operate child development centers and care for children. This common shared work in the community gives the two merging congregations common work in which to share.

The final aspect Kloha states is, “Fourth, there is unity in confession and practice. One temptation for a local congregation is to see itself as “autonomous” and therefore able to do whatever it sees fit as it carries out its work.” As stated above, congregations of the LCMS are not officially defined as “autonomous” but “self-governing.” In a merger setting the two congregations are no longer afforded the option of doing “whatever it sees fit.” In this immediate merger context, the two congregations that merge now work together. They combine resources to work in the best interest of two campuses that now share a common goal and join into a single

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<sup>29</sup> Noland, “Why Lutheran Church – Missouri Synod and Its Kin Have Declined, 1.

<sup>30</sup> Kloha, “The Trans-Congregational Church,” 186.

organization to expand the ministry as a whole.

As we consider best practices for congregational mergers that move towards a multisite ministry, a clear understanding of the doctrine of the church is necessary. We have discussed the proper understanding of church in terms of the Gospel and the sacraments from the *Luther's Small Catechism* and the Lutheran Confessions. We have reviewed the relationship of this definition with its proper distinction of unique LCMS polity. Finally, the doctrine of the church must include its trans-congregational relationships to be complete as they provide a thorough understanding of church, especially for church mergers.

### **Doctrine Three: Two Kingdoms**

The final doctrine to examine for theological foundations in the MAP will be the Doctrine of Two Kingdoms. Understanding this doctrine is crucial as a church merger will require actions in both kingdoms. The relationship Lutheran Christians have in both kingdoms is a tension that must be kept in proper balance throughout the church merger process. Lutherans with a proper understanding of this doctrine are equipped to maintain and even facilitate the proper balance necessary for a church merger.

A Lutheran understanding of the Two Kingdoms generally describes our Christian interaction in the church and the world around us. In search of a concise definition for the Doctrine of Two Kingdoms, Lutherans generally point to Martin Luther who writes, “For this reason God has ordained two governments: the spiritual, by which the Holy Spirit produces Christians and righteous people under Christ; and the temporal, which restrains the un-Christian and wicked so that—no thanks to them—they are obliged to keep still and to maintain an



outward peace.”<sup>31</sup> This teaching from Martin Luther has informed our relationships not so much to the church, but to the temporal world around us.

A basic principle of application is described by Koehler as, “The fact that the powers are ordained of God does not mean that they must govern according to the Scriptures, making the Bible the fundamental law book of the land.”<sup>32</sup> Koehler summarizes from the Lutheran Confessions that while the Bible is the sole authority in the church, it does not belong in civil government. Koehler eventually lands at a separation of church and state maintaining that Luther taught that both kingdoms should not interfere with each other. He concludes, “Any usurpation of power either by the Church or by the State in the domain of the other results in misrule and tyranny in both, and is destructive of religious liberty, as the history of the past amply proves. The strict separation of State and Church is conducive to the welfare of both.”<sup>33</sup>

This separation of church and state is widely acknowledged and supported in our 21<sup>st</sup> Century American communities. In the balance of God’s people living in both kingdoms it would constantly seem to tip to the kingdom of power in the temporal world. Even Luther noticed this tendency when he writes,

For my ungracious lords, the pope, and the bishops are supposed to be bishops and preach God’s word. This they leave undone, and they have become temporal princes who govern with laws which concern only life and property. How completely they have turned things topsy-turvy! They are supposed to be ruling souls inwardly by God’s word; so they rule castles, cities, and people outwardly, torturing souls with unspeakable outrages.

Similarly, the temporal lords are supposed to govern lands and people outwardly. This they leave undone. They can do no more than strip and fleece, heap tax upon tax and tribute upon tribute, letting loose here a bear and there a wolf. Besides this, there

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<sup>31</sup> Walther I. Brandt and Helmut T. Lehmann, eds., *Luther’s Works Volume 45: The Christian in Society II*, (Minneapolis: Fortress, 1962), 91.

<sup>32</sup> Edward W. A. Koehler, *A Summary of Christian Doctrine: A Popular Presentation of the Teachings of the Bible*, (St. Louis: Concordia, 1952,) 281.

<sup>33</sup> Koehler, *A Summary of Christian Doctrine*, 284.

is no justice, integrity, or truth to be found among them. They behave worse than any thief or scoundrel and their temporal rule has sunk quite as low as that of the spiritual tyrants.<sup>34</sup>

Luther shows us the wretched state that comes when church leaders and state leaders interfere in each other's affairs. McKenzie writes, "In spiritual matters, Luther found no place for law or coercion or government, but in the affairs of state he also found no place for the Gospel. Indeed, if each form of authority does not keep to its own sphere and employ its own means, the result will be the corruption of both and the failure of each to accomplish the purposes for which God had established them in the first place."<sup>35</sup> We can clearly see how the separation of church and state seems to be the most desirable theological position. In allowing each to remain in its own realms, with its own means and areas of jurisdiction, perhaps then the Christian can lead a balanced life as citizen in both.

However, God's people are citizens in both realms and so are the churches they attend. The LCMS acknowledges:

But the church is also a social organization—in the Missouri Synod, congregations, districts, and Synod. While it is tempting to assume that these groupings are synonymous with that church defined by Word and sacrament, they actually have one new characteristic: they are also institutions of the temporal kingdom. They usually incorporate, adopt constitutions and by-laws, and conduct business according to *Robert's Rules of Order*. While the church of the Word is not subject to civil law, since even in totalitarian societies that Word can still be preached or read "underground" and cherished in faith even in the isolation of a prison cell, the church as an institution of society is subject to civil law. The church as institution can be created and abolished, it can sue and be sued, and it can address other legal entities, including government, regarding its institutional interests or concerns.

The institutional church will be concerned about zoning laws that affect the location of church buildings and church schools. It will be concerned about legislation that may encourage or discourage the work of the church (such as tax exemptions, tuition tax credits, or voucher plans for child care and private education). The church as an

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<sup>34</sup> LW 45: 109.

<sup>35</sup> Cameron A. MacKenzie "Luther's Two Kingdoms," *Concordia Theological Quarterly* 71 no. 1, (January 2007): 7.

institution of society has as much right as any other institution to make its concerns known to those who enact legislation, and law-makers should be as concerned about the impact of their legislation on churches as they are about individuals and for-profit corporations.<sup>36</sup>

Every congregation intersects with and interacts with the temporal kingdom. If a congregation owns property, it interacts with the temporal kingdom. If the congregation relies on such basic services as electricity, water and other public utilities then the congregation interacts with the temporal kingdom. If the congregation relies on modern phone services, then it interacts with the temporal kingdom. Every congregation will on some level interact with the temporal kingdom. These minimum levels of participation in the temporal kingdom interaction rarely cause any concern for the life of a congregation. However, even at these minimal levels, a congregation and pastor must be aware of the places where the activity of God's work also intersects with the temporal kingdom. In times where congregations face a financial shortfall and need to pay the bills duly owed, parishioners often wish for grace, and yet, it is the rule of law that must rightly govern the temporal kingdom.

It can be clearly seen how any attempt to keep the two realms of the spiritual and temporal kingdoms separate is going to be limited at best. Additionally, many congregations subject themselves to much higher levels of participation in temporal kingdom interaction. According to the LCMS, "Nationally, more than 2,100 Lutheran schools serve over 250,000 students in early childhood centers, elementary schools and secondary schools. Additionally, three international schools serve students and families abroad in Hong Kong, Shanghai and Hanoi. The LCMS school system is the largest protestant school system serving children today."<sup>37</sup>

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<sup>36</sup> The Lutheran Church—Missouri Synod Commission on Theology and Church Relations (CTCR), *Render Unto Caesar ... and Render Unto God: A Lutheran View of Church and State*, (St. Louis: The Lutheran Church—Missouri Synod, 1995), 66.

<sup>37</sup> Terry Schmidt, "Promoting Christ Centered Education" (St. Louis: LCMS School Ministry, The Lutheran Church—Missouri Synod, 2017), 2.

These activities require congregations to be more deeply involved with the temporal kingdom. Congregations must consider state required licensing, curriculum and rules to carry out these ministries. Often there are numerous government regulations, government programs and additional requirements necessary for these opportunities. St. Paul reassures the Christian conscience and the church when it comes to interacting with the affairs of the government. In the Epistle to the Romans, he writes, “For rulers are not a terror to good conduct, but too bad. Would you have no fear of the one who is in authority? Then do what is good, and you will receive his approval” (Rom. 13:3). Here St. Paul reminds us that the temporal kingdom is a gift from God to maintain order in our world. God governs and rules over all creation; government is God’s gift, His agent in this world for the purpose of maintaining order. There is a significant amount of debate on whether the current government is doing a sufficient job. The debate is one that will remain ongoing both in the church and in the world. Despite this age-old debate, the basic concept for God’s gift of government remains; it is to support and protect those who do well and be an agent of wrath for the evil doer. God gives government for the sake of good order.

Congregations should exist for the sake of the ministry organized around Word and sacraments. Most Lutheran pastors and congregations would prefer that the temporal kingdom interactions be a non-factor in ministry. However, as previously demonstrated, every congregation exists in and interacts with the temporal kingdom, even if only minimally. However, in a church merger there are those social institutions, IRS requirements, articles of incorporation, constitutions and bylaws that the CTCR mentioned earlier. Church mergers require significant interaction with the temporal kingdom just to accomplish the task of a legally recognized merger.

Generally speaking, we have the freedom to practice our faith. Worship services,

administration of the sacraments, the preaching of the Word and Bible studies are carried out in this nation without government interference in the spiritual realm. Some congregations and pastors desire for this non-presence of government to continue when the congregation chooses for itself activities or ministries that require more frequent and deeper involvement with the temporal kingdom. Many pastors and Christians long for the government to be as absent from their schools and child development centers just as it is from their sanctuaries. When congregations attempt to subvert or avoid government regulations or authorities for the sake of convenience, they are avoiding that which God intended for good. Dr. Arand warns us, “God’s reign is active both in the church (Kingdom of the right hand) and in the world (Kingdom of the left hand). However, we must be careful not to confuse the two realms/reigns distinction with the American separation of church and state.”<sup>38</sup> A clear distinction and understanding of the Doctrine of Two Kingdoms will aid church mergers as it necessarily interacts in both realms.

### **Conclusion**

In this chapter we have learned and reviewed the Biblical and theological foundations crucial to church mergers. Specific examples of church mergers are not present in the Scriptures; however, church mergers can and do represent a significant move toward the sort of blessings God intended for His people. Our God seeks unity with us as expressed in His *missio Dei*, and He seeks unity among His people as stated in Psalm 133.

From this Biblical foundation in the mission of God we have pursued an intentional understanding of ecclesiology within the Lutheran context. In the Lutheran context of ecclesiology we have discussed the important tensions between the true marks of the church

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<sup>38</sup> Charles Arand, “God’s Two Sustaining Hands,” Concordia Theology Today Blog posted July 2, 2012, accessed January 27, 2018, <https://concordiatheology.org/2012/07/gods-two-sustaining-hands/>.

(Word and Sacrament ministry) and the polity of the church. Additionally, within Lutheran ecclesiology we have learned about the crucial nature of trans-congregational relationships both in God's right hand kingdom and God's left hand kingdom. Clear understandings in ecclesiology and Luther's distinction of two kingdoms provide solid theological foundation for church mergers.

As we turn to the literature research, much of what has been written thus far on church mergers comes from outside Lutheranism. The theological foundations discussed here provide a framework that guides the engagement with extensive recommendations about church mergers from outside Lutheranism. Combined with the recommendations from current research as well as solid foundations from the Scriptures and Lutheran theology, Lutherans are uniquely positioned for intentional, successful church mergers.

## **CHAPTER THREE**

### **CHURCH MERGER BEST PRACTICES IN THEORETICAL PERSPECTIVE**

In the literature review of church mergers there are two aspects of recent research necessary to explore that are crucial to this MAP. In light of the theological insights from the previous chapter, not all church merger research and recommendations are useful for a Lutheran context. First, this chapter will explore the recent research of church mergers. Through numerous books and articles as well as recent statistics, one can clearly see a new landscape for church mergers has been emerging for some time. A brief examination of this emerging landscape sets the stage for when church mergers are not only a good option, but also at times necessary for the advancement of the church.

Following an overview of the landscape of church mergers this chapter will then examine crucial steps necessary and recommended in church mergers. Much has been written on what is vital to successful church mergers, but no two authors propose the same process. Each church consultant, writer or expert proposes a different process and states different steps which may be crucial. An overview of these crucial steps is necessary to gain an understanding of how church mergers might work well in a Lutheran context. Additionally these crucial steps will be examined with the goal of multisite ministry in mind. Not all steps are helpful if they do not support the end goal of a new multisite ministry.

Within this volume of literature there are also numerous suggestions for success and pitfalls to avoid failure. The recent research examines these avoidances, pitfalls and other legal and practical implications to follow. Through these three sections we can see the emergence of

best practices in church mergers for a multisite ministry within in a Lutheran context.

### **Landscape of Church Mergers**

Church mergers are becoming more common and are taking place in a variety of ways. In examining the trends of the Christian church and its growth patterns today, Barna Research Group specifically notes the challenges that church mergers bring in assessing church growth. In their research they interviewed 222 church leaders who were active in multisite ministry or church planting efforts.<sup>1</sup> The Barna Research group examines church mergers as a subcategory in their overall efforts to evaluate the growth of Christianity and other trends within Christian congregations. Barna states, “Approximately three out of 10 churches in this study (29%) have experienced a merger or acquisition.”<sup>2</sup> In Barna’s study to understand how congregations are growing, a church merger is clearly a factor to consider. Church mergers have clearly joined the landscape of the church planting and mission efforts of Christianity.

With church mergers becoming more common, many speculate why church mergers are necessary. The most common perception for church mergers is that it has become one of necessity. Like the business world, mergers are often seen as the result of a failure. One resource on church mergers states in their opening comments, “In the boom times of Christendom, when congregations multiplied in a culture favorable to faith, ‘merger’ was synonymous with ‘failure.’ Today however, the positive anxiety is often uppermost in church leaders’ minds and hearts. In these lean times of post-Christendom, when congregations struggle to just hold their own in a culture suspicious of faith, ‘merger’ has become synonymous with ‘opportunity.’”<sup>3</sup>

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<sup>1</sup> A Barna Report Produced in Partnership with Cornerstone Knowledge Network, *More Than Multisite: Inside Today’s Methods and Models for Launching New Congregations* (Grand Rapids: Barna Group, 2016), 6.

<sup>2</sup> A Barna Report, *More than Multisite*, 20.

<sup>3</sup> Thomas G. Bandy and Page M. Brooks, *Church Mergers: A Guidebook for Missional Change* (Lanham:



These words remind us that some church mergers are being considered as a matter of survival. Bandy and Brooks, as stated above, reference post-Christendom as “lean times.” These lean times are further illustrated by the sobering realities about which other church leaders have written. Thom Ranier has stated, “As many as 100,000 churches in America are showing signs of decline toward death.”<sup>4</sup> In the LCMS, the context for this MAP, the news is even bleaker. One recent study in the LCMS states, “In 1971, the number of LCMS adherents stood at 2,772,648. By 2010, the total number was only an estimated 2,270,921 adherents — a drop of about 500,000 people. While there was a decline in every decade since 1971, about half of that decline occurred between 2000 and 2010 — the number of LCMS adherents dropped by 250,000 people over that ten-year period.”<sup>5</sup> The decline of the LCMS and other denominations is well documented and lamented by many.

In this post-Christian era, lamented by the sober statistics above, it would seem that mergers have become the necessity for survival of Christendom. Yet, when all the research is done on post-Christendom, the problem only represents a minority of the population. Barna research tracks America’s trend toward becoming more post-Christian. It defines this tracking as a person’s level of irreligion. Briefly, Barna describes this analysis by stating:

To measure a person’s level of irreligion, Barna tracks 15 metrics related to faith that can be used to measure an individual’s level of Christian identity, belief, and practice. They include whether individuals identify as atheist, have never made a commitment to Jesus, have not attended church in the last year, or have not read the Bible in the last week.

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Rowman & Littlefield, 2016), 1.

<sup>4</sup> Thom S. Rainer, *Autopsy of Deceased Church: 12 Ways to Keep Yours Alive* (Nashville: B&H, 2014), 7.

<sup>5</sup> George Hawley, “The LCMS in the Face of Demographic and Social Change: A Social Science Perspective.” *Journal of Lutheran Mission*, 3, no. 3 (December, 2016): 38.

To qualify as “post-Christian,” individuals had to meet 60 percent or more of the factors (nine or more out of the 15 criteria). “Highly post-Christian” individuals meet 80 percent or more of the factors (12 or more of these 15 criteria).<sup>6</sup>

After the analysis is done, Barna reports that only 44% of those surveyed meet the criteria of post-Christian.<sup>7</sup> The LCMS may be in decline. Every denomination may be struggling and declining as well. However, Barna demonstrates that there is only a 44% minority of post-Christian people in America. While some might believe that church mergers are taking place out of survivalist necessity, there is a much better reason.

Bandy and Brooks discuss changing this rationale for church mergers. They write, “Most churches raise the question about merger or some other drastic option for congregational life and mission because they are experiencing a panic attack.”<sup>8</sup> This apt description for many congregations illustrates the perception that panic and survival are driving the landscape of the church merger movement. They go on to write, “The resulting panic attack led church people to ask: *Is it time for a merger?*”<sup>9</sup>

However, there is a better reason. Bandy and Brooks go on to say, “Sometimes, however, the question is raised out of a kairos moment. Kairos is a New Testament word that describes an unexpected moment of divine revelation that changes everything for the good. It is stressful, but it is positive.”<sup>10</sup> This volume offers the proper rationale that sets the stage for a church merger. Brooks and Bandy summarize the same goals nearly every article and book on church mergers discuss. Tomberlin and Bird write, “Everybody wins in successful mergers.”<sup>11</sup>

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<sup>6</sup> Barna Group, *Barna Trends 2017* (Grand Rapids: Baker Books, 2016), 184.

<sup>7</sup> Barna Group, *Barna Trends 2017*, 184.

<sup>8</sup> Bandy and Brooks, *Church Merger*, 1.

<sup>9</sup> Bandy and Brooks, *Church Merger*, 2.

<sup>10</sup> Bandy and Brooks, *Church Merger*, 2.

<sup>11</sup> Tomberlin and Bird, *Better Together*, 8.

As we examine the landscape of Christianity today, there are plenty of reasons and evidence for panic attacks both in the LCMS and Christendom. To meet these challenges, church mergers are becoming a vital tool towards successful transformation of congregations. However, church mergers must be created from kairos moments. Bandy and Brooks write, “Panic attacks focus attention on maintaining the status quo.”<sup>12</sup> They go on to say, “Kairos moments focus attention on achieving mission results.”<sup>13</sup> In the landscape of Christianity today, the stage has been set by a number of factors for congregations to pray for kairos fueled mergers to make significant and positive change in the life of the congregation.

Prior to considering the crucial steps necessary for church mergers, it would be helpful to gain a better understanding of the different types of church mergers. Jim Tomberlin and Warren Bird offer four models for church mergers. In establishing the models they are careful to note that many congregations do not use the term merger. They write, “The word *merger* contains a lot of emotional baggage, mostly negative.”<sup>14</sup> The overview of mergers types can be summarized with the following chart.<sup>15</sup>

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<sup>12</sup> Bandy and Brooks, *Church Mergers*, 4.

<sup>13</sup> Bandy and Brooks, *Church Mergers*, 3.

<sup>14</sup> Tomberlin and Bird, *Better Together*, 21.

<sup>15</sup> See Table 1.

Table 1: Four Main Types of Church Mergers

<b>Rebirth</b>	A struggling or dying church that gets a second life by being restarted under a stronger, vibrant and typically larger church.	Allows for rebuilding on good work already done in community.	Because of stewardship or strategic reasons it might result in the sale of the joining church property.
<b>Adoption</b>	A stable or stuck church that is integrated under the vision of a stronger, vibrant and typically larger congregation.	Church’s mission better fulfilled by submitting name, ministries, and assets to a church that can multiply its impact beyond what it could do remaining solo.	Potential loss of facilities, staff, ministries, members and friends. Also a greater potential for disappointment, change resistance, and post-merger conflict.
<b>Marriage</b>	Two churches, both strong and growing, that realign with each other under a united vision and new leadership configuration.	Greatest potential of gains of all church mergers because both churches are typically healthy, strong and united under a compelling mission and vision they have created together.	Greatest challenge is when there is a co-sharing of the senior pastor role.
<b>ICU</b>	Two churches that know they’re both in trouble and try to turn around their critical situation but are more survival driven and often fail.	Buys time and hope in order to figure out how turn around the decline.	These are the least successful and greatest likelihood of failure.

Source: Chapter 2: “Four Models of Healthy Church Mergers,” In Jim Tomberlin and Warren Bird, *Better Together*, 21–33.

The four main types summarized in Figure 1 provide a basic landscape for the different mergers that are taking place in Christian congregations today. A basic understanding about these types and their differences are helpful. Tomberlin and Bird state, “Most churches would

describe their merger as an adoption, but in our view most are rebirths.”<sup>16</sup> Regardless of the type of the merger, it is clear that all mergers would provide realistic hope for the future of Christ’s Church. These four types demonstrate that not all mergers can be the same, in fact they are all different. Again Tomberlin and Bird state, “All mergers, like all human beings, are messy and complicated with no guarantees. Every church merger has a unique pathway. There is no one-size-fits-all formula they all follow, yet all will wrestle with the same basic issues.”<sup>17</sup> It is with this basic landscape in mind that it then becomes necessary to look at the crucial steps common in church mergers.

### **Crucial Steps**

Within the body of research there are several crucial steps that are always suggested for best practices and successful church mergers. During the crucial steps it is important to keep in mind the type of merger being attempted and accomplished. In this MAP, the merger under consideration is a rebirth, multisite merger. Not all mergers are planned for multisite. In the process called Vital Merger, the selling of all property of the merging churches is called for in favor of a neutral site. In Vital Merger, “The Vital Merger document states that all churches are to sell all property (with the exception of needed parsonages), move into a neutral location for worship, and begin the process of purchasing new property and/or building.”<sup>18</sup> Clearly a Vital Merger process will not result in a multisite ministry. Therefore, the crucial steps to follow must be consistent with goals of the final merged ministry vision and mission in mind.

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<sup>16</sup> Tomberlin and Bird, *Better Together*, 29.

<sup>17</sup> Tomberlin and Bird, *Better Together*, 33.

<sup>18</sup> Dirk Elliott, *Vital Merger: A New Church Start Approach that Joins Church Families Together* (Fun and Done Press, 2013), 89.

## Step One: Prayer

This first step is assumed and perhaps can be overlooked. The first step is to immerse the entire merger process in prayer. As Matt Rogers writes, “The process of merging churches is fully contingent on God bringing two unique churches to a perfect position for healthy partnership.”<sup>19</sup> Rogers encourages that church members and pastoral leadership should be praying alike. He writes that, “Pastoral teams should make this a matter of corporate prayer when they gather to consider the future of the churches they lead.”<sup>20</sup> More specifically, Rogers states that, “...churches can also pray that God would send them “His Church” – a church capable of bringing about such change.”<sup>21</sup>

Prayer throughout the process is necessary because ultimately a church merger must be about the pursuit of God’s plan. Pursuing God’s plan is near the top of a list of Tom Bandy’s keys to a successful, mission-driven merger. Bandy writes, “There is no win/win negotiation and no trade-offs or exclusions. The participating congregations are not negotiating for their institutional glory or survival, but are creating a single, new community that will take the experience of Christ deeper and further.”<sup>22</sup> In the pursuit of a healthy, successful church merger, it is through prayer that participants can and will be shaped into the sort of people God uses for this process. As Luther reminds us when we pray the Lord’s Prayer, “The good and gracious will of God is done even without our prayer, but we pray in this petition that it may be done among us also.”<sup>23</sup> Prayer has the power to shape our lives, change our hearts and shape us to God’s will

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<sup>19</sup> Matt Rogers, *Mergers: Combining Churches to Multiply Disciples* (Equip to Grow Press, 2016), 44.

<sup>20</sup> Matt Rogers, *Mergers*, 44.

<sup>21</sup> Matt Rogers, *Mergers*, 44.

<sup>22</sup> Tom Bandy, *Missional Mergers: 9 Keys To Success*, Outreach Magazine, posted July 14, 2015, accessed February 8, 2018, <http://www.outreachmagazine.com/features/4689-missional-mergers-9-keys-to-success.html>.

<sup>23</sup> The Lutheran Church—Missouri Synod, *Explanation of Luther’s Small Catechism*, 252.

for church mergers for the good of His kingdom. It is assumed that Christians would pray about something as important as the merger of their church. However, here it is included as an intentional, vital first step toward any merger to take place within the congregation.

### Step Two: Exploration and Dating

Once prayer is firmly established to carry the process along by God’s grace, the next step described in the research is the exploratory phase. This phase is described in a number of ways. Matt Rogers provides one of the most basic examples when he writes, “Churches must put themselves on the market by declaring their interest in such a merger. Church leaders should begin by disclosing this desire to their congregation.”<sup>24</sup> While those conversations might be seen as official, there are other examples of mergers that start with unofficial conversations. For example, “For Woodside Bible Church in greater Detroit, which has done five mergers to date – all of a rebirth or adoption model – the exploration stage always started with a conversation over coffee.”<sup>25</sup> In this initial phase, exploration and conversations are key to opening up the possibilities of two congregations merging to become one.

Often times many of the conversations in this initial phase are described as a process similar to dating. Leaders and church members are trying to discern if the two merging congregations are compatible with each other. Dirk Elliot writes, “For a smooth merger transition, the congregations need to spend adequate time dating.”<sup>26</sup> Elliot speaks of this dating process as a process of breaking down barriers and building relationships between the two congregations. He says, “Just as people date before they marry, churches need to build

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<sup>24</sup> Rogers, *Mergers*, 44.

<sup>25</sup> Tomberlin and Bird, *Better Together*, 64.

<sup>26</sup> Elliot, *Vital Merger*, 58.

relationships, break down barriers, and value the differences in one another before they merge.”<sup>27</sup>

One of the challenges of this dating process is creating the right relationship that will transform into a healthy church merger when the process is finished. Bandy and Brooks write, “Most mergers are fundamentally selfish. They cast a vision of self-importance. People are motivated by the self-preservation. They are so eager to save themselves that they lose themselves. Successful church mergers are just the opposite. They are fundamentally selfless.”<sup>28</sup> They go on to say, “The real compatibility of churches considering merger is not based on the preferences of people who are already members, but the yearnings of people who are outside the church and are the object of urgent compassion by members of the church.”<sup>29</sup>

Through the dating process the right kind of relationship must take shape if the merger is to be successful. Some authors suggest that this dating process take place through cooperative activities. Rogers writes, “This could include a joint date night in a fun, informal and relaxed setting”<sup>30</sup> Rogers concludes, “In general, people are more apt to talk freely in these types of settings: thus a discerning listener will be able to learn more about the state of the church, the quality of leadership, the relational shrapnel that may exist, deep hurt or divisiveness between team members and the like.”<sup>31</sup>

Other authors suggest more formal discussions with a structured framework. Tomberlin and Bird suggest during the dating process that there are three main questions that frame the merger conversation.

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<sup>27</sup> Elliot, *Vital Merger*, 58.

<sup>28</sup> Bandy and Brooks, *Church Mergers*, 17.

<sup>29</sup> Bandy and Brooks, *Church Mergers*, 17.

<sup>30</sup> Rogers, *Mergers*, 56.

<sup>31</sup> Rogers, *Mergers*, 56.



- Is this merger *possible*? Determine if a merger is a possibility through a conversation between the senior pastor and the church boards. This results in a recommendation to begin the church merger deliberations.
- Is this merger *feasible*? Determine the compatibility of the two congregations through due diligence in addressing all the issues. This results in a recommendation to both congregations to merge or not to merge.
- Is this merger *desirable*? This becomes apparent as the churches go through a process of meetings to discuss the idea of merging, which culminates in a churchwide vote or poll.<sup>32</sup>

Through this dating activity the church merger becomes a more clear reality or less of a possibility. Just as in dating we begin to find compatible life partners, the dating process in church mergers helps us discern compatible ministry partners for missions. The dating process is a useful analogy. As Tomberlin and Bird suggest, “When the senior leaders of two congregations conclude that the potential benefits of merging outweigh the drawbacks of going their separate ways, then the merger deliberations process can begin.”<sup>33</sup> In the dating process actual merger formation starts to take shape without the full commitment to go through with the full merger. While each party can still go their separate ways, often times it is this initial exploration that begins to lay the foundation for a successful, missional church merger.

### Step Three: Communication Starts Implementation

As the process continues, the conversations get more substantive and serious. As the merger becomes more possible, the conversations turn to the feasibility and desirability of the merger. In this step, congregations have the necessary conversations, discussions and meetings that lead up to approving a merger and coming together. The communication that takes place actually begins to implement the merger, making it more of a reality.

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<sup>32</sup> Tomberlin and Bird, *Better Together*, 68.

<sup>33</sup> Tomberlin and Bird, *Better Together*, 69.

This crucial communication phase is compared by one author to parenting. He writes, “Like parents taking the time to unify their approach before sharing an important decision involving a beloved child, churches involved in a merger with one another are wise to do the same.”<sup>34</sup> The communication that comes from leadership must be intentional. The goal of this communication is to demonstrate that a merger is not only possible but feasible and desirable. Therefore, the communication should be extensive.

When it comes to the substance of the communication, it must demonstrate that the two congregations are alike enough to merge. Bandy and Brooks suggest, “Churches all have a unique culture, but they are rarely able to describe it. The first step on the journey toward merger, therefore, is to help each church in the conversation to be able to clearly articulate its identity and purpose. Only then can two churches explore the question of compatibility: *Are we enough alike to merge?*”<sup>35</sup> Answering these questions will require both congregations to be honest with themselves and begin reflecting on their identity. The authors continue, “Sadly, some churches cannot even get this far. Honesty is beyond them. That means a merger conversation is over before it really started.”<sup>36</sup> These statements properly show the importance of the communication that needs to take place at this step.

In the course of this communication building the necessary foundation for a church merger, Dirk Elliott suggest two things. First, he writes, “People need time to process the information they receive, ask clarifying questions, and reflect on their feelings and God’s direction for their church.”<sup>37</sup> Congregational members cannot be expected to just simply go along with whatever is

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<sup>34</sup> Elliott, *Vital Merger*, 67.

<sup>35</sup> Bandy and Brooks, *Church Mergers*, 47.

<sup>36</sup> Bandy and Brooks, *Church Mergers*, 47.

<sup>37</sup> Elliott, *Vital Merger*, 68.

said. Just as the leaders have dated, prayed and spent time processing their thoughts on a possible church merger, church members need that same time to process.

Second, Elliott writes, “Although communication from and with the laity carries the most weight with church members, clergy support is vital. Verbal support from the pastors helps cast the vision and keeps the process moving forward.”<sup>38</sup> On one hand, pastors may be discouraged by the reality that their communication does not bear as much weight as the conversations among the laity. On the other hand, this information clearly shows us that the role of the pastor is obviously very crucial in this communication step.

Congregations throughout this step will most likely continue to use all the usual forms of communication at their disposal such as newsletters, bulletins, letters, and mailings as well as the use of digital means to help communicate this message. Matt Rogers writes,

Even if people have heard less-than-reliable information at the outset, they have heard it from a person within their church that they trust and not from the leader of another church making a sales pitch. A skillful leader can take the conversations that have happened up to this point and redirect them toward the true story of the church merger. The public vision casting during this meeting is the most vital moment in the merge process up to this point.<sup>39</sup>

The vision casting and communication that take place in this step ultimately lead to a recommendation to merger, or not. The recommendation to merge is where the next step begins.

#### Step Four: Wedding and Celebration

At some point in the merger process action must be taken beyond dating and talking. As Matt Rogers writes, “The outcome of the hard conversations outlined above will give each leader great clarity in determining the nature of the relationship moving forward. If unity is found, then

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<sup>38</sup> Elliott, *Vital Merger*, 69.

<sup>39</sup> Rogers, *Mergers*, 58.

the churches may move from dating to engagement.”<sup>40</sup> Engagement and movement toward merger implementation is at the heart of what is taking place in this step. As a benchmark for unity, often times church consultants look for similar DNA, similar core values and/or other places for unity by which a merger will be healthy and successful. Tomberlin and Bird write, “The best merger possibilities occur when there is at least an 80 percent DNA match between the two congregations in doctrine, philosophy of ministry and ministry style. Like any good marriage, the more in common, the better chances of success. But sometimes, as in a good marriage, the right combination of opposites have a strong attraction to each other.”<sup>41</sup>

Within the context of this MAP, the two merging congregations are aligned along LCMS denominational lines. This creates tremendous unity in doctrine that already exists. The positions of unity and differences will be addressed in the next chapter within the project design. It is sufficient to say here that the DNA match between the two congregations in the context of this MAP meet this need with their similarities and their opposites as well.

Tomberlin and Bird go on to write, “This phase begins with a recommendation to merge to both congregations by both leadership teams accompanied with a FAQ document. This is followed by congregational town halls at both congregations, culminating in a congregational vote or poll by the joining church, if not both congregations.”<sup>42</sup> In the book *Better Together*, as stated here, it would seem that the vote to merge needs to take place in the joining congregation and is optional only if necessary within the lead congregation. Due to the nature of polity in the LCMS that allows congregations to be self-governing, the vote of both congregations is essential to the merger. The voting in both congregations, rather than just one, is an expression of

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<sup>40</sup> Rogers, *Mergers*, 67.

<sup>41</sup> Tomberlin and Bird, *Better Together*, 70.

<sup>42</sup> Tomberlin and Bird, *Better Together*, 70.

commitment to merger, an expression of unity and a desire to continue fellowship. Where mergers have already been likened to marriage, a vote in only a single self-governing congregation might be likened to only one spouse taking vows at the marriage ceremony. The self-governing nature of LCMS congregations drives the need for both congregations to vote. However, the voting by both congregations should be seen more as a celebration of the wedding taking place in two congregations rather than a legalistic requirement.

There are two documents helpful to congregations regarding voting on a merger. As stated above, *Better Together* suggests the use of a FAQ (Frequently Asked Questions) document to facilitate both the communication to congregational members and the discussion when it comes time to vote. This is an essential tool as Tomberlin and Bird write, “One of the most helpful tools for communication is a FAQs document, made available to a church’s entire constituency, both online and in print.”<sup>43</sup> The FAQ document for the congregations as the subjects of this MAP can be seen in Appendix Two.

The next document necessary for facilitating a vote in congregational mergers is a document that some would describe as a prenuptial agreement. Initially, the idea of a prenuptial agreement is seen as derogatory. In less romantic settings like church mergers, they can be a useful tool. Elliott writes:

Many romantics are turned off by the notion of a prenuptial because a contract seems cold and pessimistic, opposite of the loving feeling that is leading them toward the altar. However, a good prenuptial allows the couple to understand the boundaries and parameters of the arrangement in a way that wine and roses cannot. Like couples carefully preparing a life together by using a prenuptial, churches merging together outline the details, conditions, and agreements of their merger through a merger document. Effective merger documents outline the basic terms of the merger without creating a lengthy document that is overly binding or cumbersome to read.<sup>44</sup>

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<sup>43</sup> Tomberlin and Bird, *Better Together*, 74.

<sup>44</sup> Elliott, *Vital Merger*, 83-84.

Ultimately it is the merger document, or prenuptial, that the congregation votes on to approve or disapprove the merger. In the previous step much was stated about the intentionality that should be used when communicating the merger. Due to Elliott's own confession of prenuptials perceived as pessimistic and/or derogatory, often times the merger document is not referred to as a prenuptial. Even Elliott in his own book almost immediately begins referring to the document as a merger document or agreement. In the specific context of the congregations at the subject of this MAP neither the term "prenuptial" nor "merger agreement" was appropriate. The document created and voted upon by both congregations in the context of this MAP was entitled "Articles of Partnership."<sup>45</sup>

Immediately following the wedding or the vote of the merging congregations, there begins a sense of new life for the merging efforts of the two congregations involved. Rogers writes, "It is vital to celebrate all that God is doing. . . . Finding a means of uniting the churches for a fun church-wide celebration is essential. Ideally, this is not simply a church service at the church facility."<sup>46</sup> The congregations at the subject of this MAP were able to celebrate the passage of their merger document (Articles of Partnership Document) in two special joint worship services. The first joint worship service was hosted by the joining congregation, Christ Lutheran Church. The joining congregation, Christ Lutheran Church, was able to celebrate with honor and dignity all the ministry in the life of that congregation as it held its last worship service. After the service the merging congregations gathered for a potluck fellowship meal following that service and the official closing of the congregation as it merged with the lead congregation, Trinity Lutheran.

The final worship service of the joining congregation, Christ Lutheran Church, included

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<sup>45</sup> See Appendix One.

<sup>46</sup> Rogers, *Mergers*, 74–75.

two special features. First, the final baptism that would be recorded into the church record books was held in its final service. Second, the final worship service featured a unity braid in the shape of a cross. In a sign of unity between the two merging congregations, each congregational president along with the senior pastor participated in the unity cross ceremony. The unity cross braid hangs on the wall near the entrance to the ministry as a clear sign of partnership going forward as a full launch of a multisite worship is anticipated.

The second joint worship service was hosted by the lead congregation where the majority of worship services will be celebrated throughout the implementation process. In this worship service the lead congregation hosted a special receiving of membership from the joining congregation. A welcome reception was held, and new member gift baskets were created. In this service special attention was given to welcoming those from the joining congregation with open arms. Also, a second unity cross ceremony was held identical to the one at the joining congregation. Each campus of this multisite merger has a unity cross on display near the worship entrance of the campus. These unity crosses on each campus remain symbols to the knowledge that as a merged congregation we are better together.

#### Step Five: Legal Assistance and Implementation

With the merger approved and progressing forward, numerous events, benchmarks and other items begin to take shape. In regards to implementation two different levels immediately begin to take shape. On one level there are the ministry, worship life and spiritual care that happen within the life of every church. On another level, there are significant legal obligations and questions that must be answered to finalize and fully implement the church merger successfully. As previously stated, Lutherans understand a two-kingdom approach in these matters. Theologically speaking, Lutheran pastors and church leadership understand both levels

of implementation as necessary work in accomplishing God’s will for the church merger. In a two kingdom paradigm, we believe that God is the head of the church, reigning over it with the Gospel, and at the same time God is the God of the world reigning over it with the Law. Because God is the God of both kingdoms, the work in both kingdoms is godly work done for the accomplishing of His will and the extension of His kingdom. A more complete discussion of this two kingdom view can be found in the previous chapter. It is a helpful reminder here lest the newly merged body of believers be tempted to disregard one level of implementation in favor of the other.

When it comes to the implementation of the merger, leadership is essential. Most of the guiding principles were previously approved in the Articles of Partnership.<sup>47</sup> Yet these principles need to be carried through by a leadership team. Tomberlin and Bird suggest, “The key to successful mergers is establishing the post-merger leadership team and integration process before the merger is approved.”<sup>48</sup> This team is required to remain faithful to the Articles of Partnership<sup>49</sup> approved by the congregation and also carry out the process of the legal requirements of the merger. This team is not asking for merger approval or the congregation to buy into merger transactions. This team is primarily tasked with implementing the vision of the newly merged congregation. Bandy and Brooks state, “Building a core team in a church merger is the key to long-term success. The transition to forming a core team is one of the most important steps on the merger journey, because the DNA of core values, vision, and mission must be embedded in the core team. The DNA embedded in a core team will make or break the church for the long

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<sup>47</sup> See Appendix One.

<sup>48</sup> Tomberlin and Bird, *Better Together*, 70.

<sup>49</sup> See Appendix One.



haul.”<sup>50</sup> The work of this core leadership team is crucial and precious in God’s sight as the newly merged ministry moves forward on both the legal and ministry levels.

In addition to the core leadership team, nearly all those consulting on church mergers recommend the use of legal counsel. As stated in the previous chapter, churches are social organizations. Tomberlin and Bird write, “There are many legal issues involved in a church merger. Many churches retain legal counsel to talk them through the intricacies of the merger process – and in most cases, it’s wisest for all parties to involve legal representation. Obviously, fees may vary depending on the attorney but generally it is a small price to pay to ensure that all the legal bases are covered.”<sup>51</sup> While many congregational members may get frustrated with the timing details or stress of the laws and regulations, it is important to remember that we should honor this process as much as the ministry level. St. Paul reminds us:

Let every person be subject to the governing authorities. For there is no authority except from God, and those that exist have been instituted by God. Therefore whoever resists the authorities resists what God has appointed, and those who resist will incur judgment. For rulers are not a terror to good conduct, but to bad. Would you have no fear of the one who is in authority? Then do what is good, and you will receive his approval, for he is God's servant for your good (Rom. 13:1–4).

Throughout this step, implementation continues on the two levels described. The core leadership team in the context of this MAP was named the Implementation Team by the congregation. The Implementation Team was tasked by the merged congregations to guide along the ministry merger opportunities in cooperation with elected church boards and leadership. The Implementation Team was also tasked with the responsibility to work with legal representation to carry out the legal requirements of the merger. In this process, the implementation team kept separate the two levels of implementation, meeting the challenges of each with grace provided

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<sup>50</sup> Bandy and Brooks, *Church Mergers*, 165.

<sup>51</sup> Tomberlin and Bird, *Better Together*, 108.

by a God who is God over both levels.

### Step Six: New Life and Unity

In this step the merger is complete, or at minimum, nearly complete. The ink on the documents is dry, and now life goes on. Matt Rogers states, “The days following a healthy merger may feel like a honeymoon. Most people from both churches are encouraged and sense the presence of the Lord in their gathering ... However, everyone knows that all good honeymoons come to an end.”<sup>52</sup> This step is important to consider because eventually the merger process is no longer an idea, a conversation or something to vote on. At this point in the merger process, the merger is a reality. As it states in *Better Together*, “In business parlance, it’s much easier to do a deal than to implement it.”<sup>53</sup> In the newly implemented merger there are some steps that can be taken to facilitate the healthy growth and life of the new organization.

These steps for a new and ongoing healthy life are outlined well by Thomas Bandy and Page Brooks who offer seven points for consideration:

1. **Old Times versus New Visions:** It is essential the newly merged church’s governance and leadership teams, committee chairpersons, and ministry team leaders are held accountable to core spiritual practices.
2. **Power Struggles versus Power Sharing:** It is essential for leaders of a newly merged church to be chosen from the new, united organization, and represent only the new, united organization.
3. **Staffing to Build the Future versus Staffing to Preserve the Past:** It is essential that brand new job descriptions are developed for all staff positions in a newly merged church. The new job descriptions should match the policy governance of the new church and not just repeat the task management of the old church.
4. **Harmony versus Effectiveness:** It is essential that the newly merged church resist codependencies, intervention with unhealthy personalities, and empowerment of dysfunctional members ... The members cannot be the mission. The mission lies

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<sup>52</sup> Rogers, *Mergers*, 90-91.

<sup>53</sup> Tomberlin and Bird, *Better Together*, 104.

out in the community. Effective organizations must always have the courage to disappoint a few in order to bless many.

5. Fear of Growing versus Readiness to Take Risks: Fear of church growth is always rooted in fear of personal growth ... It is essential that the newly merged church encourage strategies for adult spiritual growth and faith formation... Leaders become more confident about risk when they no longer fear failure, but learn to grow through failure.
6. Annual Meetings versus Congregational Celebrations: It is essential that the newly merged church avoid redundant management. Congregational meetings are really celebrations of identity and purpose ... When responsibility and authority are undermined, the church suffers loss of both focus and accountability, and gets easily sidetracked by outside agendas or internal politics.
7. Sacred Cows versus Sacred Mission: It is remarkable how quickly “sacred cows” reemerge in the life of a church. It is essential that newly merged churches emphasize that the only things that are “sacred” are relationship with Jesus Christ and participation in Christ’s mission.<sup>54</sup>

These seven points of ongoing consideration help us understand how life in the newly merged congregation continues to move forward and be successful. Many congregations may have different ideas of what a successful merger might look like. In *Better Together*, we read, “Healthy, mission-driven mergers are happening in an unprecedented way today. They are working with far more success than the more historically practiced ICU model. The big difference in these new kinds of mergers is that they don’t reduce church impact from two local churches down to one. Instead, of diminishing kingdom presence and witness, they can gain greater influence, sometimes even multiplying it exponentially!”<sup>55</sup> In summary, as the newly merged church moves into its bright future, a church that flourishes for the mission of Christ is the goal. As Tomberlin and Bird state, “Your church can flourish through merging with another. And if you’re already a vibrant church that is growing, merging also offers a way to extend your

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<sup>54</sup> Bandy and Brooks, *Church Mergers*, 198-202.

<sup>55</sup> Tomberlin and Bird, *Better Together*, 191-92.

reach and impact.”<sup>56</sup>

These are the crucial steps that are outlined by the research towards best practices in church mergers. Following these steps are no promise of a successful merger; they simply suggest the process to follow for this complex task of bringing two churches together. In addition to crucial steps for mergers, there are other factors to consider. Next we will review some of the pitfalls that face mergers.

### **Merger Pitfalls to Avoid**

In this section we will examine the various pitfalls that can plague or even doom a church merger process. These pitfalls not only doom the merger, but also damage the ministry and missional aspects of the work of the church. It is necessary to be aware of these pitfalls as the Gospel Coalition reports, “No matter how smooth the process, church merging always contains some grief from the declining congregation. And the matches are rarely perfect.”<sup>57</sup> Yet being aware of the pitfalls and/or landmines that can ensnare a church merger can help congregations navigate them. We read in *Better Together*, “The challenge of institutional survival versus shared mission and vision for the future is central to every merger’s success or failure. But even if the missional dream of reaching the lost, making disciples, training leaders for ministry and making the community a better place is truly the centerpiece of the merger, there are still several ways it can be derailed... There are many landmines to step on in the process...”<sup>58</sup> With these warnings in mind, reviewing the landmines and pitfalls of church mergers is essential to every merger

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<sup>56</sup> Tomberlin and Bird, *Better Together*, 192

<sup>57</sup> Sarah Eekhoff Zylstra, “The ‘Unintended Consequence’ Overtaking the Multisite Church Movement,” The Gospel Coalition, February 24, 2017, accessed: February 12, 2018, <https://www.thegospelcoalition.org/article/the-unintended-consequence-thats-overtaking-the-multisite-church-movement>.

<sup>58</sup> Tomberlin and Bird, *Better Together*, 93.

process.

The resource *Better Together* goes on to describe three categories where mergers fail. These categories are based on the major phases of the merger process. Within each of these categories a number of “landmines” are listed and described. In summary, the “landmines” they report are the following:

1. Landmines in the Preliminary Phase:

- a. *Waiting too long to consider merging.* Many well-meaning church leaders will hang on for years with the vague hope that things will somehow turn around miraculously if we “just have faith.”
- b. *Lack of clarity on the non-negotiables.* Once a church has decided that merging with another church is a possibility, it is important to clearly define what the non-negotiables are even before a merger opportunity presents itself.
- c. *Proceeding with insufficient information.* Churches need to check out each other’s story beyond the way one person may be presenting it.
- d. *Confusion about models and roles.* Once merger discussions begin in earnest, it is important for both parties to correctly define their relationship to one another.

2. Landmines in the Deliberation Phase:

- a. *Looking back instead of forward.* Once two churches have decided that a merger is possible, the merger deliberations can be derailed by focusing on institutional survival or preservation of the past rather than on a shared mission and vision for the future.
- b. *Refusal to release control.* The most common landmine occurs when senior pastor, senior lay leaders, or influential members of the joining church are unable or unwilling to relinquish control of their church.
- c. *Minimizing the cultural and doctrinal differences.* Another mistake churches make is proceeding with the merger even though the early deliberations revealed that their differences were greater than their similarities.
- d. *Under-communicating.* Another landmine that occurs during the deliberation stage is poor or insufficient communication to the congregation... Failure to address all the questions and concerns of the

church family can result in a failed church vote or great dissatisfaction post-merger.

### 3. Landmines in the Postmerger Phase:

- a. *Under-estimating the pain in the transition.* Change is an event, something that happens. Transition is the emotional and psychological processing of the change. Making the decision to merge is not easy, but it is the transition that determines the ultimate outcome.
- b. *Overpromising and under-delivering.* The post-merger integration is the final and most crucial phase in successful church mergers... There is a tendency to overpromise the benefits of a merger during the deliberation stage and then under-deliver the results during the post-merger integration stage.
- c. *Unclear organizational structure.* Parallel to this mistake is the landmine of starting the post-merger integration with undefined leadership and unclear reporting structures.<sup>59</sup>

These landmines as described by *Better Together* collectively describe the pitfalls of the merger relationships. There are other pitfalls described by other resources as well. Thomas Bandy and Page Brooks record what they believe is the worst pitfall of all when they write, “The worst reason to merge is to pillage another church for spare parts.”<sup>60</sup> The concern they express is that this is really not a merger at all. They write, “Too many ‘mergers’ are really just acquisitions of technologies or staff from other churches that have all but closed.”<sup>61</sup> This particular pitfall is one that the LCMS should specifically avoid. Within in the specific context of the congregations of this MAP, nearly all the LCMS sister congregations are in decline and struggling. To wait for the sister congregations to “all but close” and be the last Lutheran church standing is not a healthy merger. In fact, this self-serving approach to merger should fail because it is self-serving rather than serving Christ and His kingdom.

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<sup>59</sup> Tomberlin and Bird, *Better Together*, 93–101.

<sup>60</sup> Bandy and Brooks, *Church Mergers*, 261.

<sup>61</sup> Bandy and Brooks, *Church Mergers*, 261.

Another pitfall described by Bandy and Brooks is one of traction. They write, “The cycle of inclusivity, spirituality, and intimacy breaks down: the hospitality is not radical enough, the worship does not profoundly shape lives and lifestyles, or the spiritual growth of small group experience is not widespread or is too modest. Churches merge because one church provides strength precisely where the other church is weak.”<sup>62</sup> In this pitfall it is important to remember the partnership that the newly merged congregations create. With both their similar DNA and celebrated differences, churches in merger can create dynamic partnerships that keep ministry and missions moving.

The numerous landmines and pitfalls that can plague mergers can be very discouraging to church leaders and the church family alike. Yet, properly managed, none of these pitfalls or landmines has the power to completely destroy the merging work that God intends for His church. Brooks and Bandy remind us, “The fundamental purpose of the church is to participate in Christian movement. We are a part of God’s greater plan to bless and redeem the world. Therefore, merger is simply a strategy to accelerate movement. It is not about maintenance or survival. It is about getting the bus moving again, so that God’s people can catch up with Jesus who is already far ahead on the road to mission.”<sup>63</sup> Awareness of the pitfalls and landmines helps us avoid them. Awareness helps us keep the movement of the church moving for the sake of bringing the gospel to the community.

### **Other Multisite Considerations for Healthy Ministry**

Finally, in closing this chapter, we must examine what a multisite strategy means for the merger process and for healthy ministry. Two additional considerations are presented. First, this

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<sup>62</sup> Bandy and Brooks, *Church Mergers*, 263.

<sup>63</sup> Bandy and Brooks, *Church Mergers*, 264.

section will consider what a multisite approach means for the church merger process. Second, this section will compare and contrast a dual parish approach with church mergers.

### What Multisite Means for the Merger Process

Not all mergers result in a multisite model or strategy. For example, in *Vital Merger* the approach is to sell all church properties of merging congregations in favor of the newly merged congregation moving to a neutral location. Elliott writes, “A strategically chosen neutral location with a suitable facility positions the new church for new growth and opens the doors to creative and healthy change.”<sup>64</sup> Within certain contexts this approach might be helpful or even necessary. However, the purpose of this MAP is pursuing best practices in church mergers for multisite ministry. Therefore, it is important that we examine data and research regarding multisite ministry.

Multisite ministry models are growing within the LCMS, but they are still uncommon. Among the multisite ministries both within the Lutheran context and outside of Lutheran context, multisite models for ministry are generally regarded as something reserved for mega churches. In a report from Warren Bird, “Multisite Church Scorecard,” we are provided Key Discoveries and Fast Facts that reveal (among other things) that the multisite model is a viable opportunity. Bird reports the multisite is not just for megachurches, but congregations much smaller as well.<sup>65</sup>

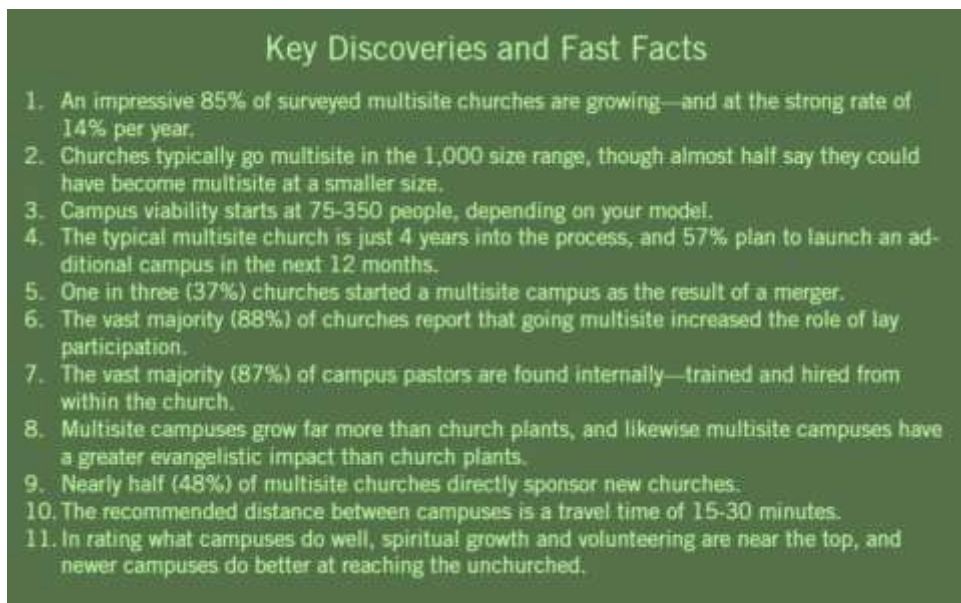
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<sup>64</sup> Elliott, *Vital Merger*, 140.

<sup>65</sup> See Figure 1.



Figure 1: Key Discoveries and Fast Facts.



Source: Warren Bird, *Multisite Church Scorecard: Faster Growth, More New Believers and Greater Lay Participation*, Leadership Network/Generis, 2014, 4.

Often when we consider multisite models there are many variables that often get criticized in Lutheran circles. Multisite models have traditionally not blended well with the LCMS characteristics of congregational self-government. Yet, when it comes to church mergers and multisite models it seems that the two were meant to work well together. Item 5 on the list in Figure 1 states, “One in three (37%) churches started a multisite campus as the result of a merger.”<sup>66</sup>

Additionally, Warren Bird released another report co-authored with Kristen Walters stating, “According to the survey, there are definite connections between multisite strategy and merger success.”<sup>67</sup> They provide the following chart sharing their findings.<sup>68</sup>

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<sup>66</sup> See Figure 1, Item 5.

<sup>67</sup> Warren Bird and Kristin Walters, *Making Multisite Mergers Work: New Options for Being One Church in Two or More Locations*, Leadership Network, 2011, 3.

<sup>68</sup> See Table 2.

Table 2: Multisite Churches Give Higher Ratings to Merger Success.

CHURCHES THAT...	GROUP THAT INDICATED A HIGHER SCORE	
	MULTISITE CHURCHES (two or more locations)	SINGLE LOCATION CHURCHES (one location after merger)
had attendance under 500 (at each church, pre-merger).	✓	
had attendance of 500 or higher (at least one church, pre-merger).	✓	
recently merged (merger happened 2006-2011).		TIE!
merged some time ago (merger happened 2005 or earlier).	✓	
were near to each other (travel time between campuses that merged was 1-15 minutes).	✓	
were further apart (travel time between campuses that merged was more than 15 minutes).	✓	

Actual question: How would you rate the success of the merger, with 1 being the lowest and 10 being the highest? Based on 156 replies.

**TABLE 1**

Source: Warren Bird and Kristin Walters, *Making Multisite Mergers Work: New Options for Being One Church in Two or More Locations*, Leadership Network, 2011.

Based on this survey, Bird and Walters state, “When asked if they would do a merger again, the vast majority of survey respondents said yes. Multisite churches (whether they became multisite before or during the merger) were far more supportive of doing a merger again than the churches that remained a single site.”<sup>69</sup>

#### Dual Parish Multisite or Merger for Multisite

Within the context of the LCMS the definition of a multisite ministry is often considered a dual parish or multipoint parish ministry. These ministries are collectively labeled “multi-congregation parish relationships.” The LCMS provides guidelines to circuit visitors in the formation of these multi-congregation parish relationships.<sup>70</sup> These multi-congregation parish

<sup>69</sup> Bird and Walters, *Making Multisite Mergers Work*, 7.

<sup>70</sup> The Lutheran Church—Missouri Synod, *Circuit Visitors Manual (2012 Revision) COP Approved September 2012, Edited 2015*, St. Louis: Concordia, 2015, 83.

relationships are not the same as church mergers. The guidelines to LCMS circuit visitors defines multi-parish relationships as, “Two or more member congregations of the Synod served by the same pastor.”<sup>71</sup> The guidelines make no reference to church mergers or multisite congregations. The only multisite definition provided by the LCMS is under the heading “Satellite Worship Site (i.e., “Second Site”), “A satellite worship site is not intended to become a separate LCMS member congregation, and its establishment is not to be reported by the district president or the mission executive. Instead, it will be reported by the corresponding congregation on forms that will be provided annually to congregations by the Office of Rosters and Statistics.”<sup>72</sup>

Under the descriptions provided by the LCMS the Satellite Worship Site is the most similar to the multisite approach described in this MAP. While this MAP has dealt with multisite ministry the more common approach in the LCMS is to form a multi-congregational relationship commonly referred to as a “dual parish.” The guidelines from the LCMS and approved by the Council of Presidents offers significant guidance to circuit visitors in forming these dual parish relationships. The Synod provides a list of items that circuit visitors are to discuss in forming dual parishes. The six items offered are:

1. Each congregation remains its own governing body. The joint relationship forms a new parish but not a new congregation. Each congregation retains its constitution and bylaws.
2. The divine call would be extended by both/all congregations meeting in a joint assembly. The pastor would be the called pastor of each congregation.
3. There would need to be a “Statement of Agreement” signed by officers of both congregations. The agreement would concern itself with:
  - a. Sunday morning and weekly schedules expected of the pastor at each congregation.

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<sup>71</sup> The Lutheran Church—Missouri Synod, *Circuit Visitors Manual*, 84.

<sup>72</sup> The Lutheran Church—Missouri Synod, *Circuit Visitors Manual*, 84.

- b. What percentage of compensation each congregation would contribute to the salary and benefits of the pastor.
  - c. If the relationship were ever to be dissolved, a separation strategy should be in place.
4. There would be one lay vote per parish and one vote by the pastor of the parish at district conventions (not one vote per congregation, but one vote for the two or more congregations). For circuit forums, however, each congregation is entitled to a lay representative, while the one pastor represents all congregations in the parish.
5. It is recommended that the delegate representing the parish come from one congregation at one convention and from the other congregation at the next convention. This alternating process assures both congregations of their opportunity to participate in district conventions on an equal basis.
6. When all arrangements and agreements are finalized and signed, a copy of the agreement(s) should be provided to the district office for its files.<sup>73</sup>

There are numerous congregations in the LCMS that are effectively using dual parish agreements to facilitate ministry. Even within the Texas panhandle circuit a dual parish ministry agreement is in place for sister congregations to facilitate ministry. In the right context, dual parish ministry can be a useful agreement and structure for ministry.

The differences between church mergers and dual parishes are significant. These significant differences can be described in Table 3 below.

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<sup>73</sup> The Lutheran Church—Missouri Synod, *Circuit Visitors Manual*, 83.

Table 3: Summary of Key Differences Between Dual Parish and Multisite Mergers

<b>Multisite Mergers or Satellite Structures</b>	<b>Multi-Congregational Structures (Dual Parishes)</b>
Motivated by common mission goals.	Motivated by church polity.
Unified single governance for all sites.	Each congregation retains its governance.
Organizing Document: Articles of Partnership	Organizing Document: Statement of Agreement
Pastor is called to one unified ministry	Pastor is called to all congregations involved.
Reporting is unified in annual congregational reports	Reporting of agreements filed with district office.
Single, unified mission and ministry	Jointed ministry and mission efforts with separation clause.

Table Source: Summary of Research Information in this MAP.

There are no significant guidelines or other LCMS published guidance offered to circuit visitors in the establishment of the Satellite ministries or church mergers. Congregations must understand the differences between these two structures in order to make a decision about the most appropriate structure. In the immediate context of this merger the dual parish structure was dismissed very early in the process for several reasons.

The first reason for not choosing a dual parish structure was related to the divine call of the pastor in this specific process. In the initial phase of discussion, Trinity Lutheran Church would not have been willing to revise or issue a new, divine call to its pastor. In addition Christ Lutheran, was not being served by a pastor at the time. The staffing of a dual parish with expectations from both self-governing congregations would have created unhealthy competition for the attention of a single pastor.

An additional reason for not choosing the dual parish format in this ministry context is it facilitated the status quo, rather than significant missional change. In the initial discussions with church leaders it was determined that a simple dual parish agreement did not create a strong

enough partnership to provide new ministry opportunities. The statement of agreement used for dual parishes simply maintains conventionality for both congregations rather than an opportunity to refocus mission and ministry efforts of both congregations. Dual parishes are appropriate in certain ministry contexts, but in this context it was not the preferable choice of either congregation.

### **Conclusion**

The surveys and research in this chapter provide a wealth of knowledge regarding the blessings, wisdom and values of two churches becoming one. In this chapter we have pursued the landscape, process, and pitfalls necessary to know regarding church mergers. In the specific context of this MAP, two Lutheran congregations have merged and continue to move towards a multisite church model. The research demonstrates that a multisite model provides for a best practice for church mergers to be successful. Both church mergers and multisite ministries remain a growing trend according to the research.

This chapter, along with the theological foundations of Chapter 2 provides the framework and foundations for the project design in Chapter 4. In the next chapter we will examine specific contextual data from both congregations that are part of this merger. The data compared to the foundations discussed here will demonstrate how the two congregations in this context are aligned to be blessed from the congregational merger and pending multisite model. As we examine the project design, we will see both similarities and inconsistencies with the best practice research that have been discussed above.

## **CHAPTER FOUR**

### **PROJECT CONTEXT AND FIELD RESEARCH DESIGN**

The previous chapters have explored the biblical, theological and theoretical principles of best practices in church mergers. This chapter explores the practical aspects of best practices for church mergers in the immediate context of the local congregations which are the subject of this MAP. This chapter is divided into three main sections, as here briefly previewed.

First, the chapter examines the immediate context including available statistical information of each congregation involved in the merger. This information provides the specific context in which the two congregations chose to merge. This section discusses four areas of congregational importance in reporting to the LMCS, namely: membership, worship attendance, principal ministries and finances.

Each of these categories is reported to the LCMS each year. These categories of information are data points used by the LCMS to compare congregations to one another. Each congregation self-reports the information and the synod publishes it online.<sup>1</sup> The financial data collected by the LCMS is titled “Giving” and is divided into four categories. These four categories are described as follows:

1. Work at Home: The total of all ministry expenses at a congregation.
2. Work at Large: The total contributions sent to LCMS District and Synod offices for ministry.

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<sup>1</sup> The online statistics for Trinity Lutheran Church are available at: [http://locator.lcms.org/nchurches\\_frm/c\\_graphs.asp?C20807](http://locator.lcms.org/nchurches_frm/c_graphs.asp?C20807). However, online statistics and information for Christ Lutheran Church will not be available as a congregation that is merged and closed.

3. Total Contributions: The total amount of offerings contributed to the congregation through tithes and offerings.
4. Other Income: The total amount of other monies collected through other revenue sources in the congregation such as school tuition, child care fees, etc.

The second section of this chapter compares and contrasts the key differences of the two congregations based on the information in the previous section of this chapter. An examination of the specific context for the merging congregations provides the basis for shared common context and key differences crucial in the merger process as stated in the previous chapter.

Third, and finally, this chapter explains the chosen methodology and design of the field research necessary to evaluate the merger best practices within the two congregations whose merger is being studied.

### **Context of the Leading Church**

As stated in the introduction, Trinity Lutheran Church of Amarillo, Texas, is nearly 100 years old. The congregation was formed in 1921. The congregation over much of its history can be described as stable. As previously stated, the congregation was not actively seeking a church merger, mission plant or new mission effort when an opportunity for a church merger was presented.

#### Trinity Lutheran

#### **Membership:**

Trinity's membership<sup>2</sup> over the last ten years has seen dramatic shifts in numbers. The baptized membership roster swelled to 674 in the 2008 reporting year. This was followed by a

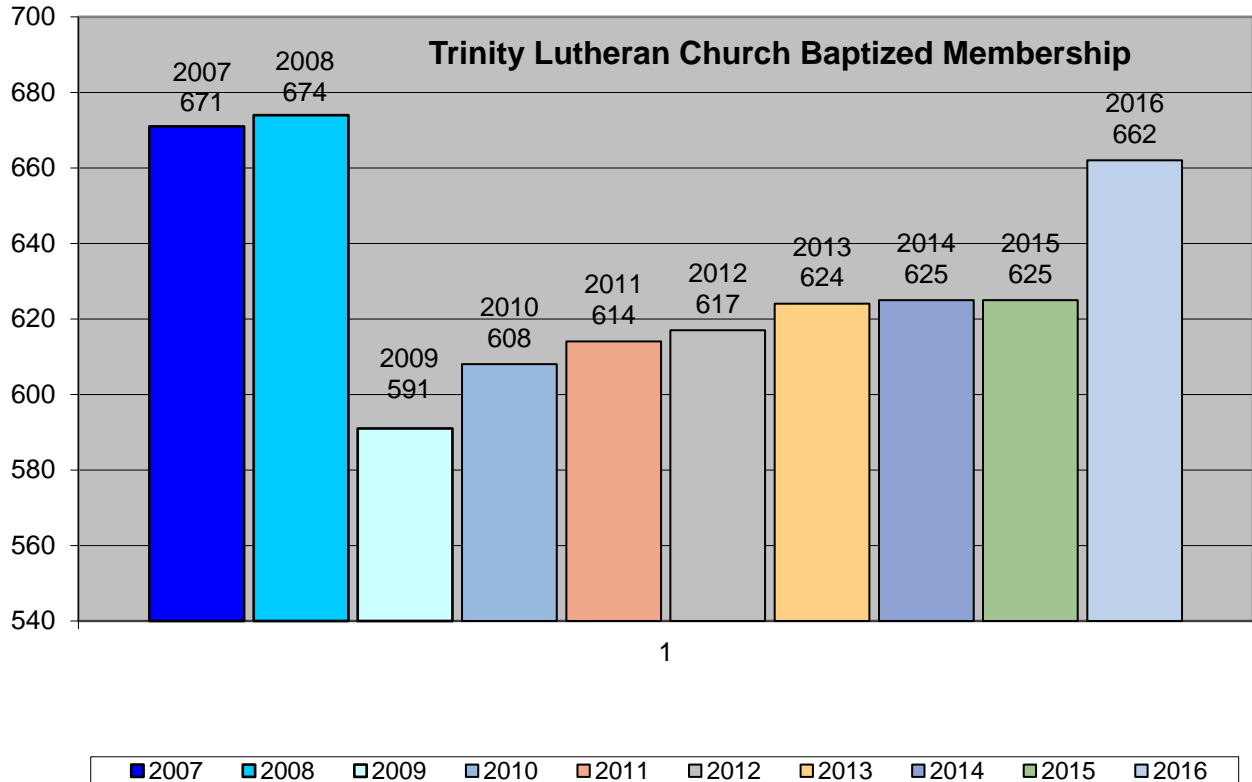
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<sup>2</sup> See Table 3 on page 93.



dramatic decline in 2009 when the membership roster was reduced to 591. The Board of Elders in the congregation reports that this decline was really due to a roster update of membership records.

Table 4: Trinity Lutheran Church Baptized Membership:



Source: Official Records of Trinity Lutheran Church.<sup>3</sup>

As Table 3 shows above. The congregation continued to grow as it did before. The growth of the congregation can be described as relatively small, but constant over the next 5 years. The next dramatic shift in the baptized membership would be the merger with Christ Lutheran Church in 2016 adding a little more than 35 members to the baptized membership of the

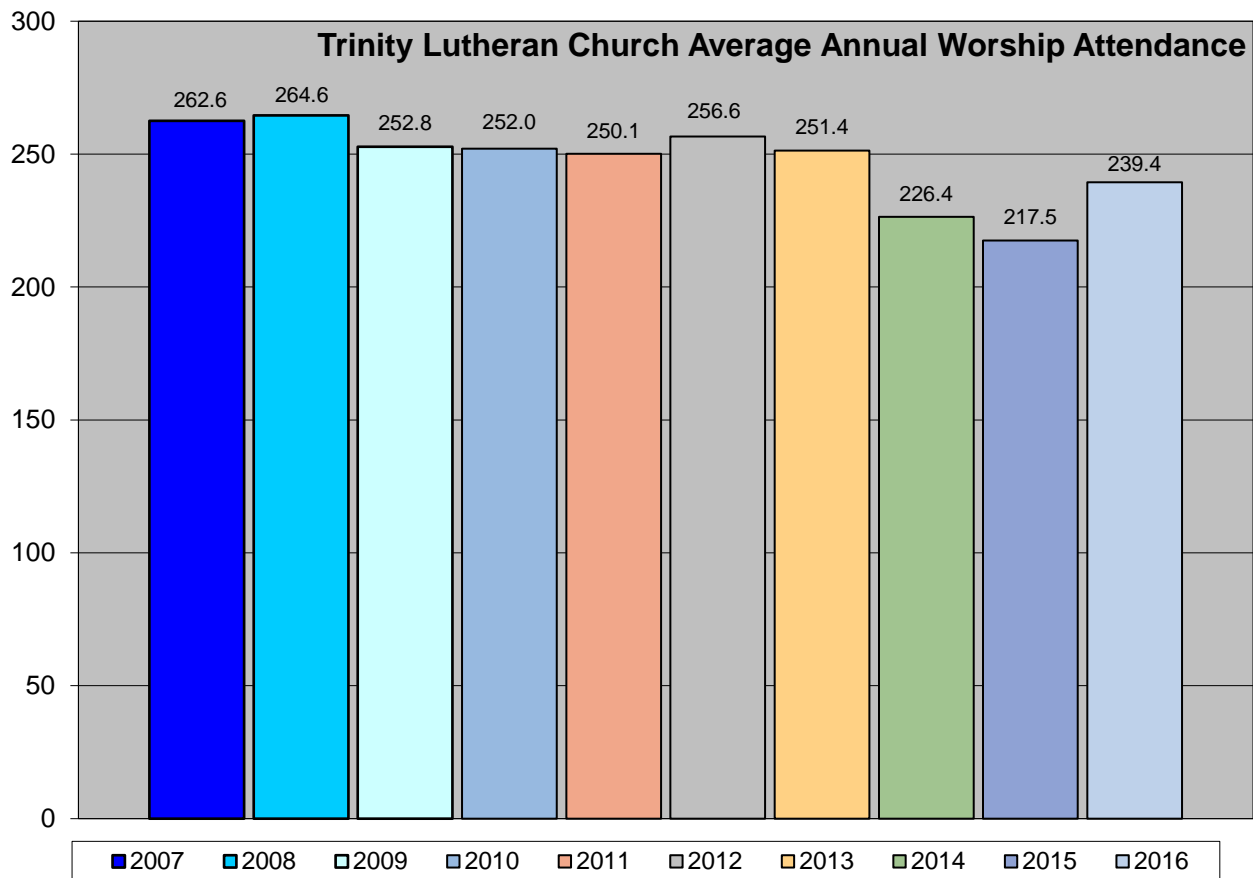
<sup>3</sup> The online statistics for Trinity Lutheran Church are available at: [http://locator.lcms.org/nchurches\\_frm/c\\_graphs.asp?C20807](http://locator.lcms.org/nchurches_frm/c_graphs.asp?C20807).

congregation.

### Worship Attendance

Trinity Lutheran Church also tracks annual worship attendance in accordance with LCMS reporting requirements. The process Trinity chooses to track worship attendance is by an actual head count of those present in all worship services for the week. This head count is usually conducted by at least one usher and then recorded in a log book each Sunday.

Table 5: Trinity Lutheran Church Average Weekly Worship Attendance



Source: Official Records of Trinity Lutheran Church.<sup>4</sup>

In Table 4 the average worship attendance for Trinity Lutheran Church does not reflect the same growth as does its baptized membership. In 2007 Trinity reports that its worship attendance at 263. From 2009 to 2013, Trinity's worship attendance plateaus at approximately 250. In the years leading up to the merger, Trinity Lutheran's worship attendance numbers were in decline annually.

### **Principal Ministries**

Trinity Lutheran's principal ministries include much more than Sunday worship services as a congregation of the LCMS. Trinity also operates a Christian elementary school. The school operates with classrooms of Pre-Kindergarten through Grade 5. In recent years, the school has operated with a student body of approximately 100 children. In the 2017-2018 academic year, Trinity expanded the Pre-Kindergarten program to children three years old. Since this addition to the program, the student enrollment has grown over 100 each year. The school has been financially supported by the congregation for the entire history of its existence since 1948. The congregation regularly describes the school ministry and its financial support of that ministry as a primary mission of the congregation.

In addition to the school ministry, the congregation added a child-development center, or child care program for non-school aged children. This program was added in 1986 to assist both staff needs and the community. Currently, the program accepts infants at 6 weeks old. The child care program also serves as an after school program in partnership with the elementary school

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<sup>4</sup> The online statistics for Trinity Lutheran Church are available at: [http://locator.lcms.org/nchurches\\_frm/c\\_graphs.asp?C20807](http://locator.lcms.org/nchurches_frm/c_graphs.asp?C20807).

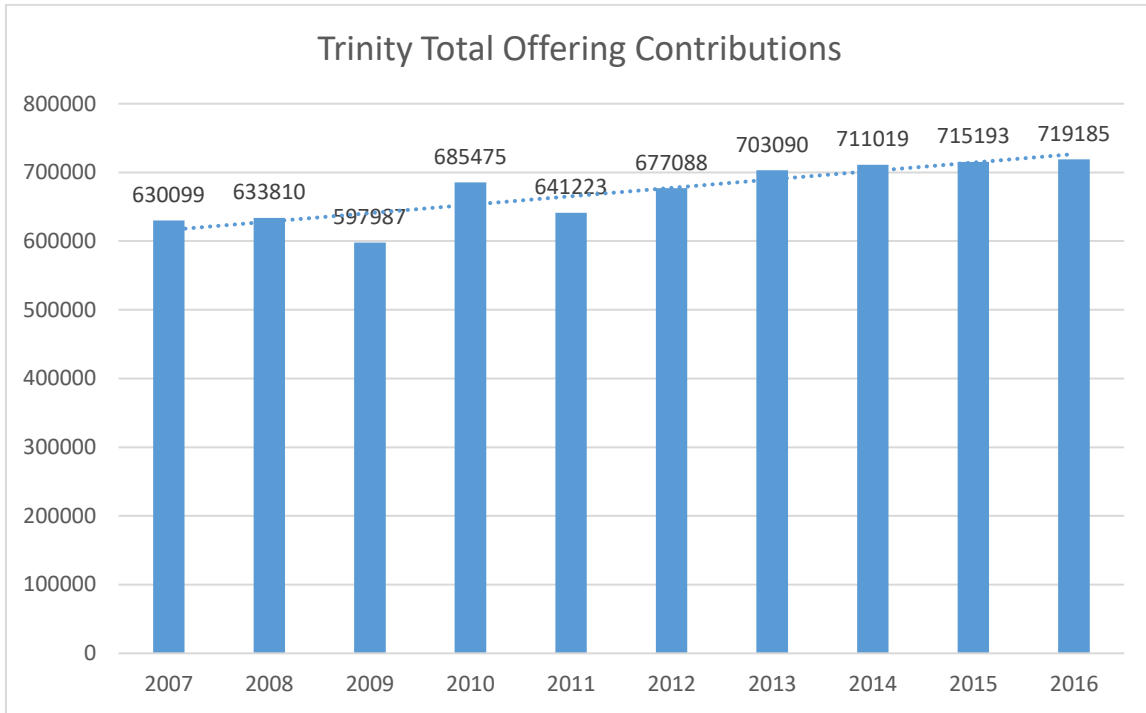
ministry serving children up to age 12. Enrollment in the child care program fluctuates weekly and is reported to the supervising Board for Child Care Services on a monthly basis. The child care ministry generally serves 120–150 children from the ages of 6 weeks to 4 years old. Economically, the child development center is a self-funding ministry that is able to support overall ministry efforts.

Trinity’s primary ministries are three-fold. The church, school and child care provide a wide range of ministry opportunities. Trinity has other organizations such as youth groups, a society of Lutheran Women in Mission (LWML), various social ministry groups, as well as several standing governance boards and committees. Despite these groups the primary ministry emphasis remains the three-fold church, school and child care ministries.

## **Finances**

Trinity Lutheran’s finances can be described as showing mostly steady growth over the last decade. Total contributions and other income have combined annually to meet the need of the rising expenses of Trinity’s primary ministries. Table 5 reports the total contributions, which is the contributions provided by members of the congregation.

Table 6: Trinity Lutheran Church Total Contributions



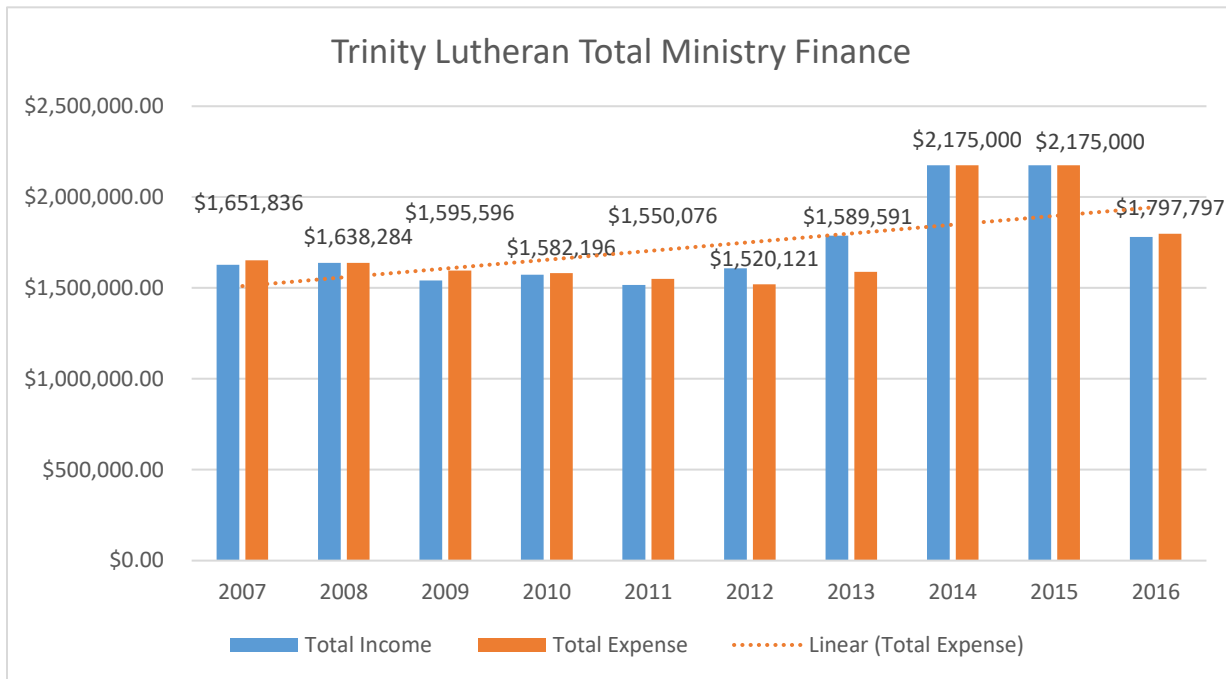
Source: Annual Financial Reports of Trinity Lutheran Church.<sup>5</sup>

Table 5 indicates that the offerings remain steady and increase over time. Trinity Lutheran’s finances as a whole also increased over time. The total contributions are only a small part of the larger financial picture at Trinity Lutheran. Table 6 indicates the total ministry work at Trinity Lutheran. In this table income and expenses are being reported. First, under the category of “Total Income” the LCMS categories of “Total Contributions” and “Other Income” are combined into a single number. Second, the LCMS categories of “Work at Home” and “Work at Large” is reported as “Total Expenses. This shares the total ministry expense of all ministries at Trinity.

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<sup>5</sup> The online statistics for Trinity Lutheran Church are available at: [http://locator.lcms.org/nchurches\\_frm/c\\_graphs.asp?C20807](http://locator.lcms.org/nchurches_frm/c_graphs.asp?C20807).

Table 7: Trinity Lutheran Total Finances



Source: Annual Financial Reports of Trinity Lutheran Church<sup>6</sup>

In Table 5 you see steady and stable growth in the contributions of Trinity members. Offering contributions are growing along with ministry. However, Table 5 is only a small part of the total financial picture at Trinity Lutheran. Table 6 demonstrates a clearer picture of the total finances at Trinity Lutheran. As reported above, Table 5 reports only the general offering contributions made to the ministry. Table 6 reports all income from all sources in the ministry. Table 6 includes the dollars from Table 5, but also includes revenue streams from school tuition, child care fees and/or any “third source funding.”<sup>7</sup> Table 6 represents a variety of sources that provide the income for Trinity’s total ministry. The congregation operates under a unified budget

<sup>6</sup> The online statistics for Trinity Lutheran Church are available at: [http://locator.lcms.org/nchurches\\_frm/c\\_graphs.asp?C20807](http://locator.lcms.org/nchurches_frm/c_graphs.asp?C20807).

<sup>7</sup> Revenue from “third source funding” can change dramatically from year to year. Some examples of third source funding may include grants, educational programs such as *Box Tops for Education*, or other fundraising programs primarily, but not limited to the school ministry.

for the total ministry; therefore, it is not necessary that Table 6 be divided into sharing the multiple different sources of funding represented. The summary of total income shown in Table 6 is sufficient as indicated.

The financial demands of Trinity's ministry have steadily grown requiring that Trinity be vigilant stewards of every resource. A closer look at Table 6 would lead an observer to believe that Trinity Lutheran is in real financial danger, rarely being able to pay her bills. However, Table 6 shows the numbers as reported to the LCMS. In reality, Trinity's fiscal year begins on August 1 and ends on July 31. This difference in the timing from calendar year and the real fiscal year has a significant role in the careful vigilance of good stewardship that allows Trinity to pay all its bills on time. Table 6 reports much larger overall financial picture that cannot be seen with member contributions alone.

In this section we have given a greater awareness of context at Trinity Lutheran Church. This context reveals a congregation that is stable and mostly static. The context demonstrates that Trinity Lutheran Church was both challenged, especially financially, and satisfied with its principal ministries. Prior to the merger with Christ Lutheran Church, the congregation may not have been looking to change its context, but to remain with the status quo of ministry it had developed. In the next section, we examine the context of Christ Lutheran Church, the congregation joining in the merger with Trinity.

### **Context of Joining Church**

Christ Lutheran Church was organized, planted and started by members of Trinity Lutheran Church on August 9, 1953. On September 20, 1953, Christ Lutheran was officially chartered as a congregation of the LCMS. It continued carrying out its various ministries in the northeast quadrant of Amarillo for most of its history. In 1999, the congregation sold its property after

deciding to move and build a new campus. The new location was across town in a new subdivision called the Woodlands neighborhood. In 2000 Christ Lutheran dedicated a new facility and made significant changes to their ministries. Due to the significant change in ministry context from one location to the next, this examination of ministry context will only consider the newer, current location of the congregation.

## Christ Lutheran

### **Membership**

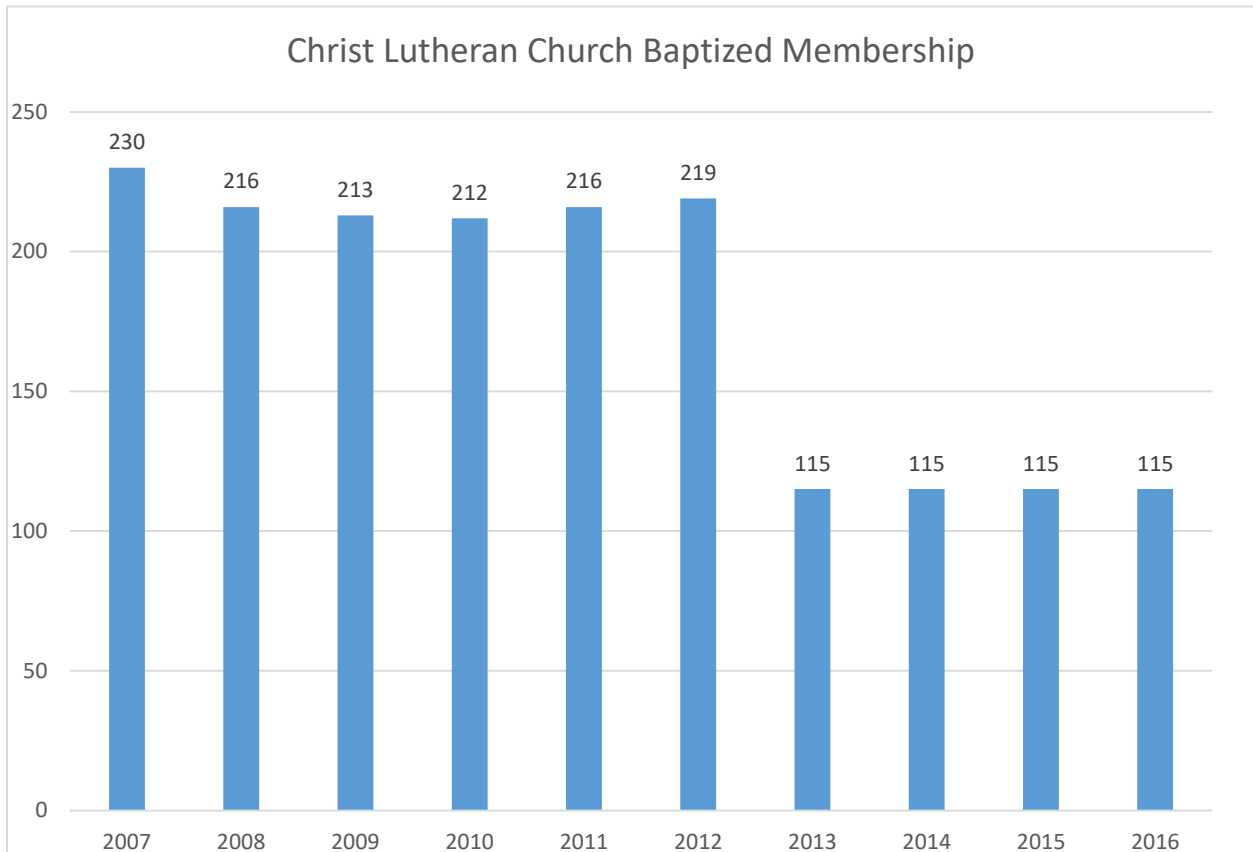
Christ Lutheran Church's baptized membership can be described as nearly flat or declining. Table 7 shows the reported baptized membership of Christ Lutheran Church from 2007 through 2016, leading up to the congregational merger. Table 7 is based on the LCMS synodical reporting from Christ Lutheran Church which is on file with the synod.<sup>8</sup>

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<sup>8</sup> The online LCMS statistics for Christ Lutheran Church are no longer available. In the merger process, paper copies of the annual reports were recovered and compiled for Table 7.



Table 8: Christ Lutheran Church Baptized Membership



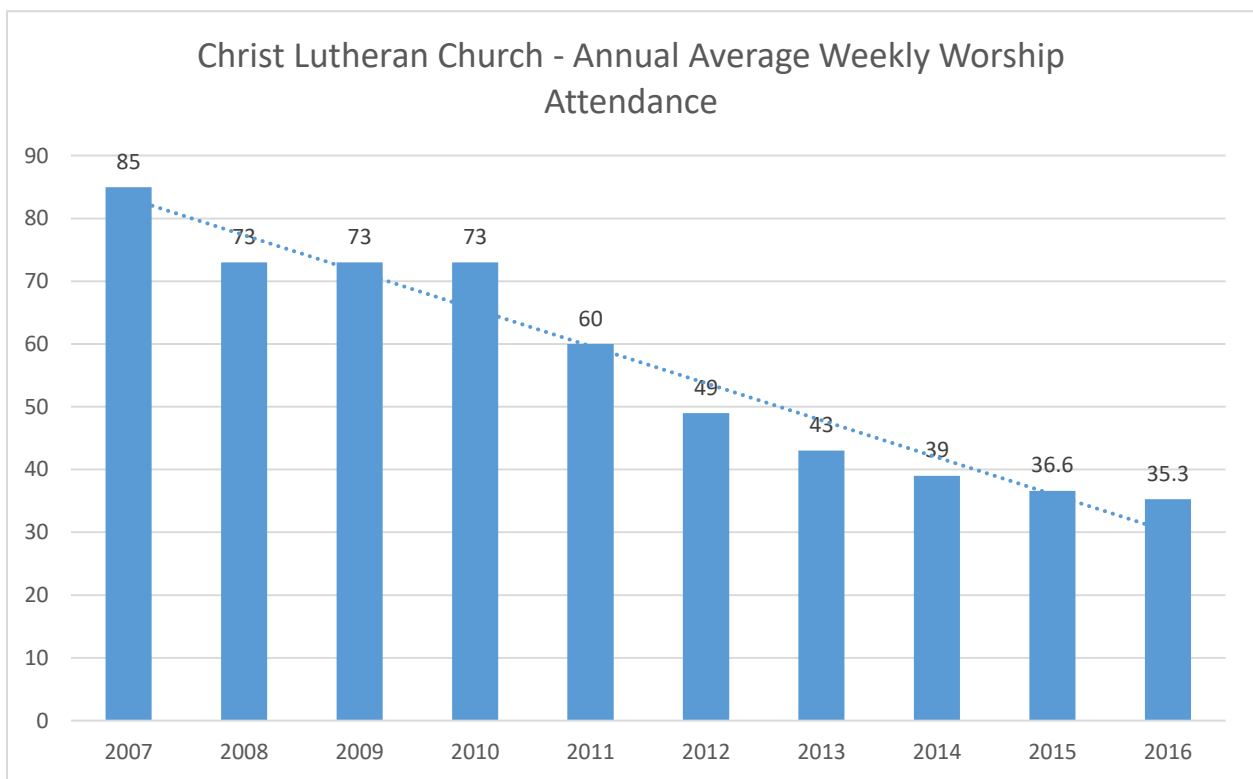
Source: Christ Lutheran Church Annual Reports.

There is a sharp decline in baptized membership from 2012 to 2013. This was likely the result of an updating of the church roster that is frequently done in many LCMS churches. After the update of the church roster, the congregation failed to report any more membership changes from 2014 through 2016. The official archives and records of the congregation record no membership changes. There are no records of baptisms, confirmations, transfers, or deaths in the record books of Christ Lutheran Church. This is either a very high level of inactivity in the congregation or incomplete reporting from the congregation. Despite this lack of information about the status of Christ's Lutheran's membership roster, it simply does not change the static trajectory of the membership numbers for this congregation.

## Worship Attendance

The worship attendance information is among the most accurate information in Christ Lutheran's records. Table 8 shows the annual average weekly worship attendance and Christ Lutheran's Sunday worship services. This information was obtained and compiled from the weekly attendance registers of Christ Lutheran Church.

Table 9: Christ Lutheran Church Annual Worship Attendance:



Source: Weekly Worship Attendance Reporting Log

The general trend of worship attendance in Table 8 is one of dramatic decline. Over a ten year period, worship attendance declines by more than fifty percent. Again there is a period from 2008 until 2010 where the worship attendance is static. This lack of change in worship attendance is not the result of insufficient reporting. The data indicates that the congregation's

worship attendance truly remained unchanged from 2008 until 2010.

After 2010, the worship attendance begins to decline and continues to do so until the year the congregation would merge. The worship attendance as shown in Table 8 is the most telling picture of the worship life and ministry context taking place at Christ Lutheran Church. From this information it is clear that the congregation was in dramatic decline and possibly even headed towards closure as a congregation.

### **Principal Ministries**

When Christ Lutheran Church moved in the spring of 2000 to the current location in the Woodlands neighborhood, it was a time of dramatic change for the congregation. In addition to the new location, there was a change in principal ministries. The congregation opened a child development center to care for children ranging in age from infant to 4 years old. The congregation embraced this new ministry optimistically in the hopes of reaching new families in their new neighborhood.

The new campus and facilities were predominately built to serve this new ministry. Classrooms, a gymnasium, office space, kitchen and bathroom spaces were all developed with the new child development center in mind. A small sanctuary space was also built as a place for Sunday worship services. However, even the worship space was planned so that it could be converted into classrooms at some point in the future. Facilities traditionally thought of as “church” facilities were planned for a second building phase to be completed in the future. A dedicated, larger sanctuary space as well as additional church gathering areas were planned as future expansion. The planned future facilities have never been built leading up to the merger.

Christ Lutheran Church, in addition to the child development center, also continued in worship and Bible study each Sunday. The congregation has also been involved in a number of

auxiliary ministries found in most LCMS churches. Some small group Bible studies also met periodically. Leading up to the merger, Christ Lutheran Church continued to gather as a congregation in these capacities.

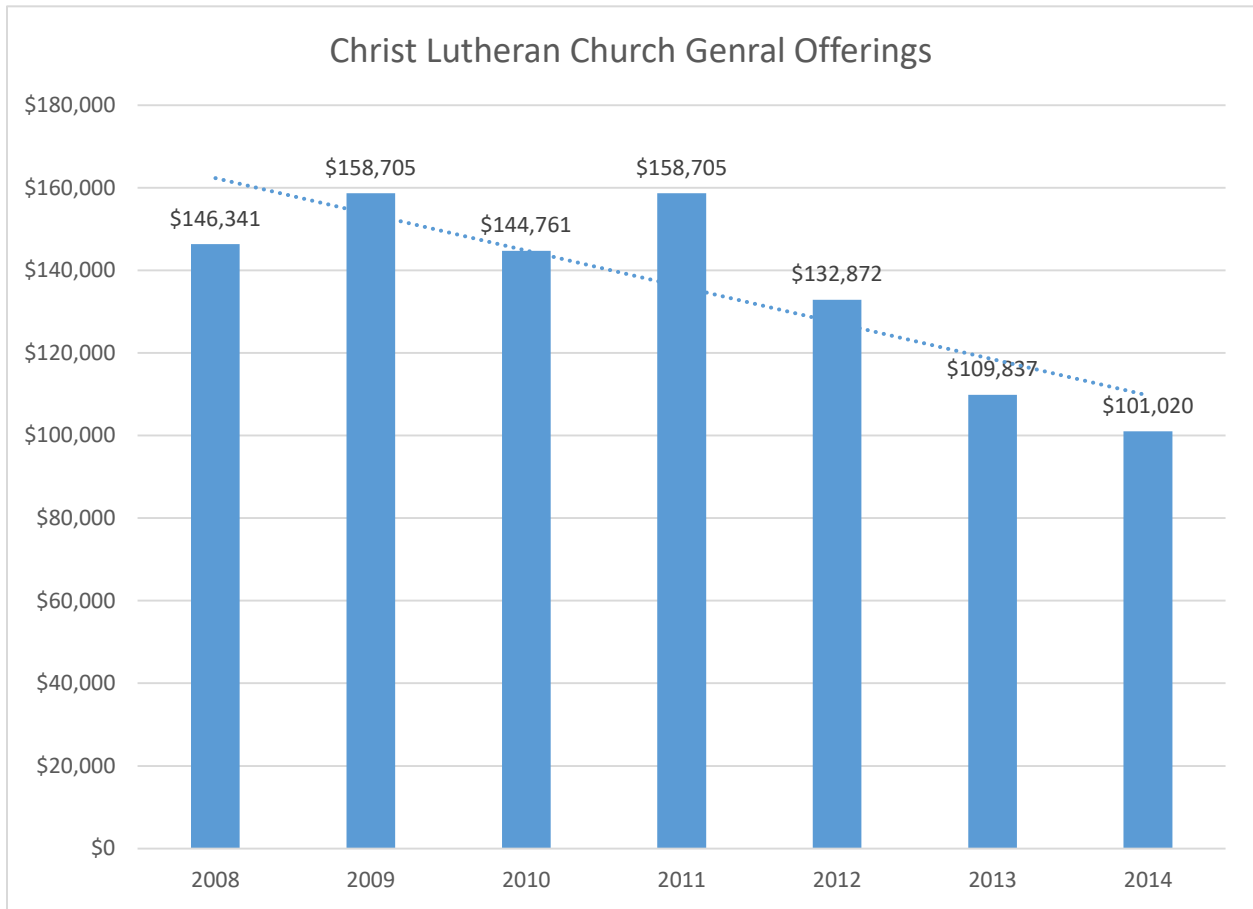
The principal ministries of Christ Lutheran Church since the spring of 2000 have been a two-fold ministry. The congregation would meet for worship and Bible study, and they also have been operating a child development center. The child development center generally has been serving a smaller enrollment than the child care center at Trinity Lutheran. The total enrollment for Christ Lutheran's child development center generally fluctuated between 60 and 80 children. These two-fold primary ministries in the life of Christ Lutheran Church often operated separately from one another with little overlap. They shared a campus and much of the same space on that campus.

## **Finances**

Christ Lutheran Church's finances must be considered in context with the information provided in the previous sections. Like the membership roster and other statistical data, the financial records were not always reported to the LCMS as they should have been. Also, with Christ Lutheran Church's two-fold ministry described above the financial information of offering contributions alone does not present the total picture. This section examines both contributions and total income and expenses of the two-fold ministry using the available data.

Table 9 indicates the total contributions at Christ Lutheran Church from 2008–2014. In this chart the years of data shown are different from other charts reported above. This variation is due to the availability of consistent source information. The most consistent source of information for Table 9 is from the annual synodical reports provided to the LCMS. Table 9 includes all contributions including general offerings and/or any restricted giving to special projects.

Table 10: Total Contributions for Christ Lutheran Church



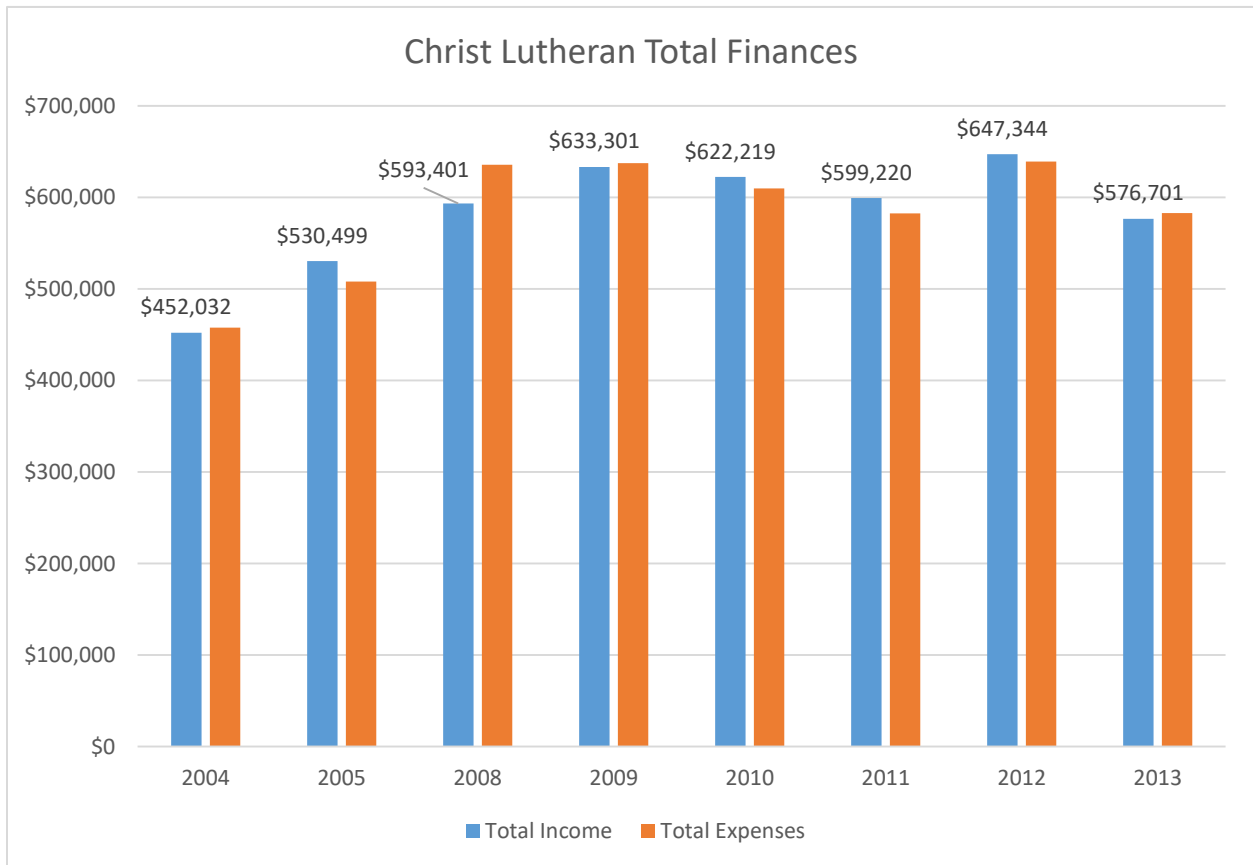
Source: LCMS Annual Statistical Reports.

The total contributions indicated in Table 9 demonstrate a generally declining trend line. This decline in contributions is similar to the decline seen in Table 8 illustrating the declining worship attendance. While the decline in these two factors is similar, the decline in worship attendance is more dramatic than the decline in contributions. The two factors together would indicate a congregation struggling to maintain viability. However, the contributions do not show the total financial picture.

Due to the ministry context of also operating the early childhood development center at Christ Lutheran Church, contributions alone are only a fraction of the financial picture. The total

expenses and income of the ministry shows a different financial picture from contributions alone. Table 10 shows the total income and total expenses annually for Christ Lutheran Church’s total ministry. While Table 9 only shows the general offering contributions in the church ministry, Table 10 shows all income revenue from all sources. At Christ Lutheran Church, the fees and tuition paid for the services of the child development center represent a major portion of the income. Christ Lutheran also operated its ministry under a unified budget for the church and child development center. Therefore, the simplified and combined information in Table 10 is sufficient and an accurate representation of the ministry.

Table 11: Christ Lutheran Total Finances



Source: LCMS Annual Statistical Reports

Table 10 indicates a different financial picture from the constantly declining trends we have seen in Tables 8 and 9. The data of Table 10 is incomplete because Christ Lutheran Church did not file the annual statistical reports every year. The annual reports that were filed are shown on the table above to provide the most complete data available. The total financial picture demonstrates that Christ Lutheran Church continues to carry on ministry and generally meets the financial challenges of those ministries. Table 10 also demonstrates a growing financial demand on the total ministries of Christ Lutheran Church. Table 10 illustrates a different trend at Christ Lutheran Church and stresses the importance of understanding the total ministry context.

### **Shared Common Context and Key Differences**

When examining the ministry context of the two congregations individually, several aspects emerge as common to both ministries, but there are also key differences between these two congregations. In this section, we examine both the similarities and the differences as we prepare for evaluation of the best practices for these congregations to merge.

One of the most important similarities between these two congregations is perhaps also the most obvious; both congregations are Lutheran. In this congregational merger, both churches are already in altar and pulpit fellowship with each other. Since they are both congregations of the LCMS, they share a common theological identity. This fellowship creates a high level of theological unity and common ground that is not only assumed, but celebrated. The congregations do not debate issues of doctrine such as baptism or communion. Their agreement on doctrine is already assumed by their relationship to the larger synod as a whole.

Another important similarity in the shared context between the merging congregations is extension of ministry beyond congregational life. Both Christ Lutheran Church and Trinity Lutheran Church are operating child-development centers prior to merging. In this context, the

child development centers will continue to operate. The ministry of the child-development centers beyond congregational life represents a significant ministry obligation beyond what can be shown by worship attendance and offering contributions. This ministry to children and families is a core value important to both congregations. The additional ministry opportunity also represents a core value that treasures Christian education.

A third common experience for these merging congregations is the level of vigilance needed in the overall financial stewardship of their ministries. Each congregation has significant income and expenses beyond the congregational offering plate. The income and expense information as seen in Tables 6 and 10 indicate that both congregations have experienced their own share of financial difficulties at times. These respective tables also indicate that the congregations have also experienced the ability to meet the financial needs of the total ministry efforts. Financial matters and concerns are a constant reality for both congregations. As the congregations merge for multi-site ministry these financial concerns will only increase and will continue to be monitored closely.

Other similarities the two congregations share could be explored, but are less important for the topic of this MAP. With the three shared contexts described above in mind, we turn our attention to some key differences between the two congregations. These key differences are deciding factors for the merger going forward. The differences must be managed as the two congregations strive for unity and new life together. If not managed properly, these key differences could ultimately become pitfalls endangering the merger process and the success thereof.

One of the key differences between the two congregations that can easily be seen in the data above is the area of worship attendance and membership. In comparing Tables 3 and 7 we



can see the differences in baptized membership trends in the two congregations. In spite of statistical adjustments to the baptized membership, Trinity's membership continues to gradually increase.<sup>9</sup> When you examine similar data for Christ Lutheran it, shows a gradual decline in baptized membership before attempting to rebound.<sup>10</sup> Like Trinity's baptized membership data, Christ Lutheran also made a statistical adjustment in the baptized membership roster.<sup>11</sup> Unlike Trinity Lutheran, Christ Lutheran makes no further adjustments to their baptized membership roster after this adjustment.

Another key difference in the ministry context can be seen in the area of worship attendance. Worship attendance averages are reported for Trinity Lutheran and Christ Lutheran in Tables 4 and 8, respectively. On one hand Trinity's worship attendance remained largely plateaued until experiencing a slight decline in the years leading up to the merger. On the other hand, Christ Lutheran's worship attendance shows a constant and gradual decline across all years that are represented in Table 8. The data indicates that both congregations struggle to grow their worship attendance on a regular basis. However, the key difference here is that one congregation is in a steady, prolonged decline over a longer period of time. The trend shown here allows the merger to be an opportunity for the revitalization of worship attendance. Whether worship attendance is actually revitalized is not the focus of this MAP. The difference in worship attendance trends is mentioned here as a difference in ministry context, so that being mindful of that difference, pitfalls can be avoided and the congregations strive for a best practice in worship for their merger.

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<sup>9</sup> See Table 3. There was a statistical adjustment in the updating of Trinity's baptized membership at the end of 2008.

<sup>10</sup> See Table 7. There is a slight increase in the years immediately leading up to 2012.

<sup>11</sup> See Table 7. The update to baptized membership occurs at the end of 2012.

Another significant difference between these two congregations is in the area of finances. The tables above show that both ministries have increasing financial needs nearly every year. In Table 5 Trinity's contributions show a gradual increase in contributions. These contributions do not fully out-pace the overall increased financial needs, but where budget demands increased in the total ministry, so did the contributions of the congregation. On the other hand, Christ Lutheran Church's offerings leading up to the merger have been in steady decline. While the total financial demands of Christ Lutheran's ministry increased, their total contributions decreased. This decrease is likely attributed to the same decline in worship attendance. Therefore, Christ Lutheran became increasingly dependent on other revenue sources, namely its child care ministry, to meet the total financial demand. Both of these congregations watch closely the financial stewardship of the total ministry. The financial realities of both congregations could be a merger pitfall or strength. In order for the financial stewardship of the merger to be a strength, the finances must be stronger together than they are separate.

Aside from the sheer size difference between Trinity Lutheran and Christ Lutheran congregations, there is one more significant difference in their ministries. The tenure of pastoral leadership has been a significant difference between these two congregations. Trinity's current pastor (the author of this MAP) has been serving the congregation for more than 15 years. Christ Lutheran Church over that same time period has had numerous pastorates and long stretches of pastoral vacancies. This difference cannot be underestimated. In the most immediate history, Christ Lutheran has been without a pastor on staff for nearly 3 years in their ministry as they come to the merger. Numerous members of Trinity Lutheran only remember a time when the current pastor has served the church. This difference between the two congregations could provide ample opportunities for further research. However, the key difference to note here is that

Trinity Lutheran has had pastoral leadership without the concerns of changes in pastoral staff, which provides a degree of stability and comfort that Christ Lutheran simply has not experienced or enjoyed in recent years.

The long-term pastoral vacancies at Christ Lutheran has initially made the defining of pastoral roles in the merger process much easier. Hypothetically, if Christ Lutheran were being served by a pastor at the time of the merger then the Articles of Partnership would be drafted to more clearly define the roles of each called minister. This is an important function contained in the Articles of Partnership approved by both congregations in the merger process. The lack of clearly defined pastoral roles is mentioned in the pitfalls of mergers discussed in the previous chapter. Regardless of how many pastors are involved, the important step of defining staff roles is laid out in the Articles of Partnership.<sup>12</sup>

We have briefly examined key components that describe the context of both Trinity and Christ Lutheran Congregations as they approach the merger. In exploring the key similarities and differences between the two congregations, we have gained an understanding of the context present for the field research in their merger. This context, along with their similarities and differences, is important to understand as the congregations merge and work towards unity in that merger. It provides a context that helps inform the methodology and field research described in the closing section of this chapter.

### **Development and Methodology of Field Research**

In this final section of the chapter we examine the field research development and methodology. The field research begins with quantitative research through the use of a Likert

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<sup>12</sup> See Appendix One: Articles of Partnership, Article 11 for a specific description of staffing roles in this merger.

scale. The Likert scale inventory or survey,<sup>13</sup> will be made available to all members of the pre-merger congregations and all current members of the merged congregations, along with the faculty and staff in the ministry. This quantitative research will provide the necessary feedback to evaluate which items in the merger process were done well from the perspective of those groups named above.

In some cases, survey respondents may overlap areas of involvement in the congregation. For example, some members of the congregation are also employed by the ministry. Each survey respondent has the opportunity to identify his or her relationship to the merging congregations. Therefore, any overlap of roles cannot be tracked due to the anonymity of the survey. Only the data provided by the respondent will be used.

The first phase of research will be conducted with the quantitative Likert scale. This quantitative research will be conducted with any communicant member of the congregation or non-member staff, over the age of 18, who gives signed, informed consent<sup>14</sup> for participating in the survey. This Likert scale may provide information that is of particular interest to the focus group to be interviewed in the qualitative research to be done later. Items included on the Likert scale are aimed at helping the focus group identify what went well with the congregational merger and what could have been done better. The Likert scale is to aid in establishing which steps in the process have been most helpful for the two congregations becoming one ministry. Among the numerous participants of the quantitative survey are elected officers of the congregation, staff members, and members of the focus group.

An additional and important step in the field research is the use of qualitative research

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<sup>13</sup> A copy of the survey is contained in Appendix Four.

<sup>14</sup> The informed consent document is contained in Appendix Three.

through a focus group interview with the implementation team. The implementation team is a core group of congregational leaders from both merging congregations charged to implement all aspects of the merger process. This qualitative field research evaluating the merger process must be done to allow those most involved in the merger to express best facilitated the process of the two congregations becoming one. The interview in this segment of field research will ask questions centered around two major questions: “What went well?” and “What could have gone better?”

This research methodology is selected because it provides the most recent and accurate reflection of best practices throughout the merger. In addition, it allows members of the congregation to tell the story of how they have served the Lord through this process. The interview of the focus group allows members to tell their story and celebrate what has been accomplished through the church merger.

### **Timeline of Implementation**

Approval for this MAP was granted in August of 2017 by the committee at Concordia Seminary. At that time the Likert survey<sup>15</sup> and informed consent<sup>16</sup> were also submitted and granted approval. On September 12, 2017, approval was granted by the Trinity and Christ Lutheran Board of Elders for use of church directories with names and addresses for direct mailing via bulk mail of all surveys to potential respondents within both pre-merger congregations. On November 14, 2017, all surveys were directly mailed or distributed via inter-office mail to all potential respondents. A deadline of December 31, 2017, was given for the return of all surveys.

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<sup>15</sup> See Appendix Four for copy of the Likert survey and accompanying cover letter.

<sup>16</sup> See Appendix Three for a copy of the Informed Consent.

On November 9, 2017, the implementation team for the merger held one of their final meetings.<sup>17</sup> In this meeting the implementation team was given the focus group questions. They were first asked, “What went well in this process?” After discussion, the group was then asked “What could we have done better in this process.” The questions were asked by the individual who chaired the meeting and responses were recorded by me, the author of this MAP.

At the time of the deadline for the quantitative study, 46 surveys had been received with informed consent. Two additional surveys with informed consent were received after this deadline and were also included in the survey responses. In order to assist in obtaining survey responses, reminder announcements were published through congregational bulletins each week throughout the month of December. While the response is lower than desired, it is believed to be adequate to provide valid information.

In conclusion, this chapter we have examined the specific context of the congregations involved in the merger and the similarities and differences between the two congregations. Awareness of this context sets the stage for a congregational survey to be conducted in the field research phase of this MAP. The survey, combined with interview information from the Implementation Team as the focus group, will provide the basis for evaluation of the best practices in this merger. The evaluation of this merger will be reported in the next chapter.

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<sup>17</sup> In the implementation team’s October meeting they began to transition into new ministry launching activities. This transition would continue until the implementation teams final meeting in January, 2018.

## **CHAPTER FIVE**

### **EVALUATION**

In the previous chapter, this project's context was thoroughly explored. Along with this examination, there was also the explanation of the methodology, development and timeline for the field research necessary for this project. This chapter provides the findings and analysis of the field research described in the previous chapter. The findings and analysis are presented in three sections. First, the findings and analysis of the survey responses provided by the research group are presented. Second, findings and analysis of basic statistical information from the surveys are also presented. Finally, a brief review of responses to the questions posed to the focus group is included. The findings and analyses presented in this chapter will then serve as the basis for drawing conclusions for best practices in church mergers for multisite ministry.

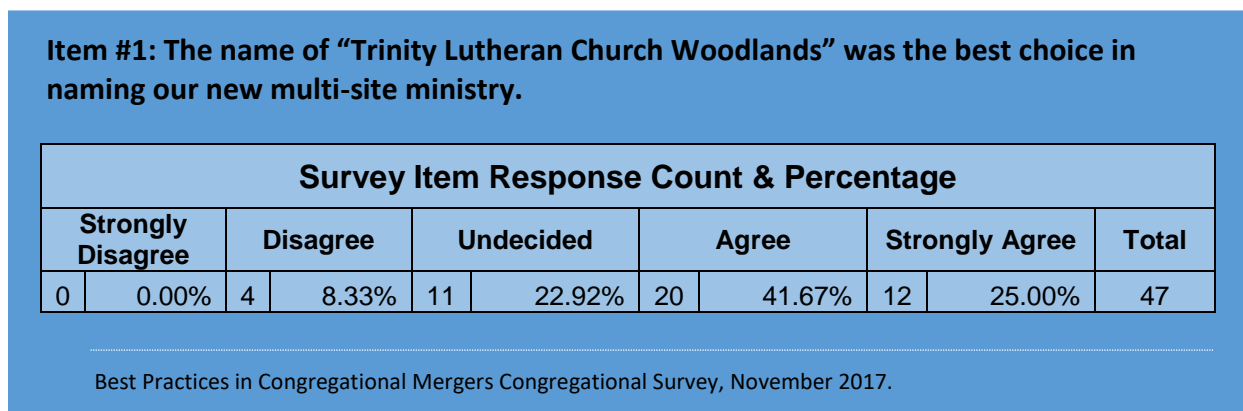
The overall purpose of this project in considering a best practices model for church mergers is three-fold. First, these concepts need to be developed to assist members of the studied congregation who are in doubt or even critical of the new partnership ministry in the merged, multisite setting. Second, the best practices can be useful to the ministry launch team as the multi-site implementation moves forward. Third, this best practices model may be useful to other LCMS congregations considering similar ministry opportunities. The evaluation of the data for a best practices model informs and serves the overall purpose of this project.

#### **Findings and Analysis of Surveys**

The congregational survey conducted for this project was mailed to each eligible survey participant in the merged ministry of Trinity Lutheran and Christ Lutheran congregations. This

survey was conducted from November to December of 2017. The survey was conducted as a Likert scale survey with opportunity for the respondents to offer comments in a designated comment section. The raw data of survey responses are documented in Appendix Five. The comments received in the survey are documented verbatim in Appendix Six. This section examines each of the six (6) survey questions individually in more detail.

Figure 2: Survey Item #1



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

The first survey item assessed agreement with naming the multisite ministry in the merger process. The survey indicates that 32 respondents (67.67%) either agreed or strongly agreed that the name selection for the new multisite ministry was the best choice. The name selected for the new multisite ministry is “Trinity Lutheran Church Woodlands – LCMS.”<sup>1</sup> The implementation team tasked with completing the merger was the group most responsible for the name selection of the new multisite campus.

Nearly one quarter of survey respondents 22.92% (11 responses) indicated they were

<sup>1</sup> Appendix One: Articles of Partnership Document



“undecided” about the name selection. The implementation team did not communicate to the whole, newly merged congregation the various names considered for the ministry. The name agreed upon by the implementation team was published and communicated in the Articles of Partnership<sup>2</sup> and then approved by both merger congregations. While the voting bodies did raise questions about the name selection at the time of the vote, the Articles of Partnership were ultimately approved by the voting congregations of the merger.

Additionally, another 8.33% (4 responses) disagreed with the name selection. It is worth noting that three out of four of these survey responses came from members of the former Christ Lutheran Church. Despite the approval of the merger, this would indicate the significance of changing the name of a church or ministry, which can be one of the pitfalls of mergers to be avoided. This is an example of what was previously stated, “No matter how smooth the process, church merging always contains some grief from the declining congregation. And the matches are rarely perfect.”<sup>3</sup>

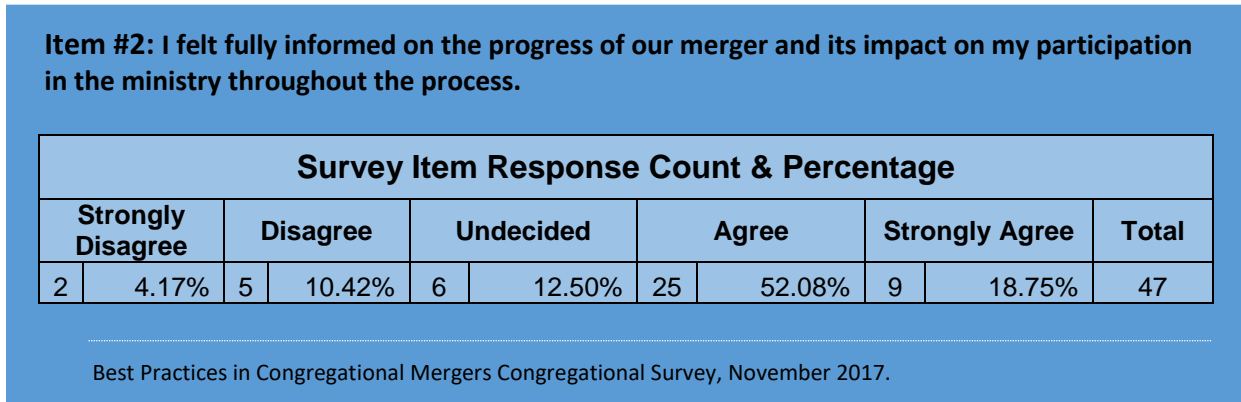
Overall, a full two-thirds (67.67%) of survey respondents “Agree” or “Strongly Agree” with the name selected in the church merger process. One-quarter (25.00%) of survey respondents strongly agreed with name selection. The survey indicates that some indecision may exist about the name selection. While this indecision exists, there is a low level of dissatisfaction among survey respondents about the name selection of the newly merged, multisite ministry.

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<sup>2</sup> See Appendix One.

<sup>3</sup> Sarah Eekhoff Zylstra, “The ‘Unintended Consequence’ Overtaking the Multisite Church Movement,” *The Gospel Coalition*, February 24, 2017, accessed: February 12, 2018.

Figure 3: Survey Item #2



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

Survey Item #2 was to assess the level to which the respondents believe they were “fully informed” on the progress of the merger process. One of the recommendations from Chapter 3 of this project is, “Although communication from and with the laity carries the most weight with church members, clergy support is vital. Verbal support from the pastors helps cast the vision and keeps the process moving forward.”<sup>4</sup> Communication is regarded as crucial and Item #2 of this survey assesses whether the level of communication has been a best practice for this congregation.

Survey respondents generally felt fully informed of the process and enabled to be part of the process. More than half (52.08%) of respondents “Agree” that they felt fully informed. An additional 9 respondents (18.75%) “Strongly Agree” that they felt full informed. Overall, 34 of the 47 (more than 70%) respondents expressed agreement about being fully informed. This level of agreement would indicate that the members of the congregation have been generally satisfied with the level of communication.

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<sup>4</sup> Tomberlin and Bird, *Better Together*, 69.

The numbers indicate there are some who did not feel fully informed about the merger process. A small minority of 5 respondents (10.42%) disagreed about feeling full informed. One might be tempted to believe that this minority of responses is unimportant; however, this serves as a reminder that methods or frequency of communication always have room for improvement. These concerns become clearer when examining the comments offered by various respondents.<sup>5</sup>

The comments offered by respondents regarding Item #2 suggested that communication should have been better. Respondent #042 wrote,

In reference to Item #2: Future mergers will have greater participation and success when all involved are given the chance to understand the process, from the very beginning. In this process, only a small group knew the idea, initially, and too much time was allowed to lapse before others were brought in. This caused rumors, even wild rumors that had no basis in fact, but had no correct information to counter them.<sup>6</sup>

This comment illustrates the importance of clear and proper communication at every phase of the merger. This respondent comments that more people should have known about the merger ideas “from the very beginning.” It is reasonable to agree with this respondent that future mergers would have greater participation with better communication. However, it is equally possible that the merger would have never taken place without the development of a clear vision by key leaders that could be presented and serve as the basis for clear communication.

The respondent also indicates the reality that some would spread misinformation in the merger process. Rumors and wild rumors are a clear issue in light of the Eighth Commandment, “You shall not bear false witness against your neighbor.”<sup>7</sup> Rumor, wild rumors or gossip should not be part of the merger process, but are clearly a concern from this respondent. The evidence offered by these comments stresses the importance of clear, consistent and continual

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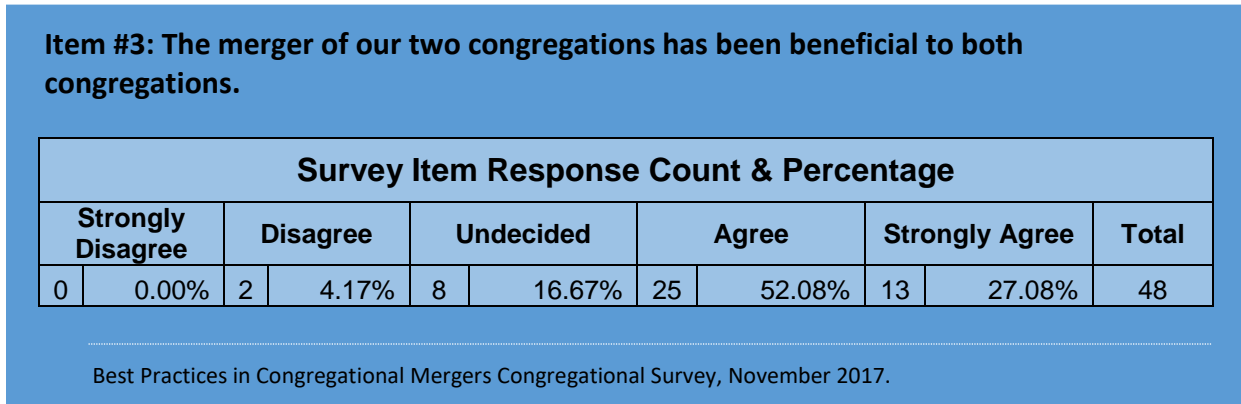
<sup>5</sup> See Appendix Six for a full verbatim report of all comments offered by respondents.

<sup>6</sup> See Appendix Six, Respondent #042.

<sup>7</sup> The Lutheran Church—Missouri Synod, *Explanation of Luther's Small Catechism*, 207.

communication. The goal should be to make every effort to “over” communicate the merger process as much as possible.

Figure 4: Survey Item #3



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

In Item #3 the survey seeks to assess a general response of whether respondents believe this merger has been beneficial to both merging congregations. It would be difficult to believe that any best practice is being achieved if the merger has not been beneficial to the merging congregations. Therefore, this item assesses the agreement that the merger has been beneficial to both merging congregations.

Based on the responses received only two (2) respondents answered “Disagree” when asked whether the merger has been beneficial to both congregations. Additionally, another eight (8) responses elicited an answer of “Undecided.” These responses account for 20.84% of the total response. The comments offered by the respondents provide insight into the reasons for their uncertainty and disagreement.

For example, respondent #045 indicated a response of “Undecided” when answering this

item and wrote in the “Comments” section, “Good for them not specifically for us.”<sup>8</sup> This comment accurately reflects the common temptation for a merger to be selfish to one merging congregation or the other. As we saw in Chapter 3, the selfish temptation for one congregation to benefit more than another comes from loyalties and traditions that existed pre-merger. The pre-merger congregational affiliation would not matter, as the temptation for selfish gain has the potential to exist in both pre-merging congregations.

Another comment in the survey said, “I remain concerned about the long-term success of the ‘Woodlands’ campus and have some fear of a detrimental impact of the total ministry.”<sup>9</sup> The stated concerns and fears of respondent #037 led this person to “Disagree” with Item #3 in the survey. This respondent is concerned about “long-term success” and is fearful of “detrimental impact” on the ministry as a whole. This respondent highlights two important factors in church mergers, and both should be clear in the process early on. First, the long-term success of a church merger must be defined. While other respondents might already see benefits and success in the merger, the exact success desired by the group ought to be clearly stated before the Articles of Partnership are adopted. Second, this respondent brings to light the fear of “detrimental impact” on one or both congregations. Detrimental impact on the congregation, if present at all, ought to be temporary in nature and serving a longer term goal of success. The fears and concerns expressed here are a natural part of church mergers. As described with Item #2 (above), these concerns and fears can be mitigated with clear, consistent and open communication at every stage of the church merger process.

In Item #3 there was a clear majority of respondents who believe that the church merger

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<sup>8</sup> See Appendix Six, Respondent #045.

<sup>9</sup> See Appendix Six, Respondent #037.

has been beneficial to both congregations in the process. A total of 38 of 48 respondents indicated that they “Agree” or “Strongly Agree” that both congregations have benefitted in the process of the church merger, representing nearly 80% of the respondents in the survey. This level of response would indicate that respondents in the survey are seeing various benefits to the church merger for the stated multi-site ministry goals in this process.

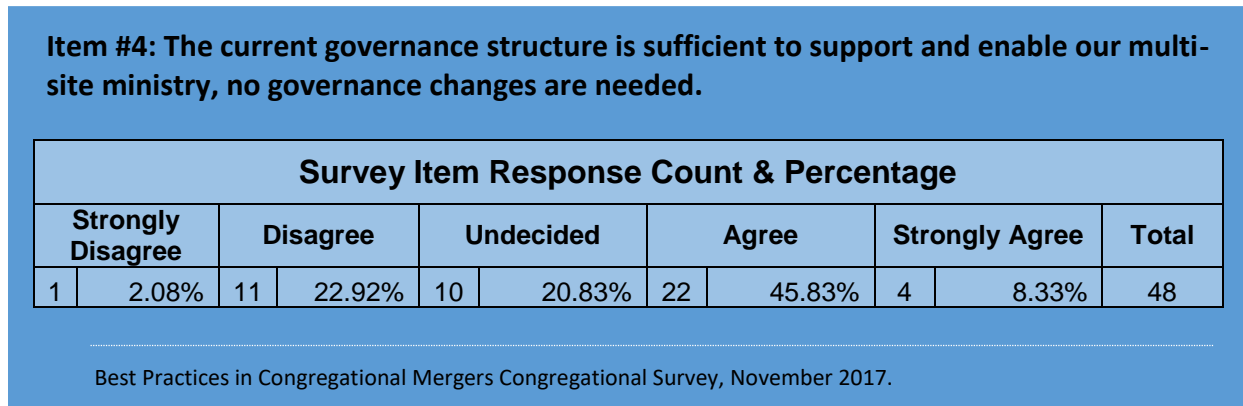
One respondent stated, “It’s always sad to see a church break apart for any reason. Hope to someday see them have services at the Woodlands again.”<sup>10</sup> This particular comment is helpful because it highlights both the apprehension and anticipated benefit that the church merger for multisite ministry is seeking to accomplish. This respondent acknowledges a sadness that comes with church mergers and also states the desired benefit to be accomplished. These comments highlight for us the importance of a church merger being beneficial to both congregations in the process.

In Item #3 we sought to demonstrate that this church merger process for multisite ministry would be beneficial for both merging congregations involved. The responses reflect that the vast majority of respondents believe the merger has been beneficial. Despite concerns expressed in the process, most members see the beneficial nature of the merger as it launches into a multisite ministry. Benefits, both those realized and anticipated, are a crucial part of the process for both congregations.

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<sup>10</sup> See Appendix Six, Respondent #019.

Figure 5: Survey Item #4



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

An examination of the data for Item #4 reveals the most divided responses of the survey. This item of the survey was to assess the level of agreement about the sufficiency of congregational governance. In a church merger, two congregations come together and that includes their systems of governance. In the unlikely event that both congregations have the exact same governance and policies, this item would be unnecessary. In this case the merger would commence with little regard to governance. Even the most subtle changes in congregational governance require examination and intentional thought as to implementing a governance that adequately serves the new mission and merger.

In this merger the two congregations share similar governance structures. Both congregations rely on a system of elected boards and committees to carry out the business of the church. Both congregations elect similar officers to represent their congregations. There are numerous similarities. Despite the numerous similarities, there are also several distinct differences in numbers of boards, committees and elected individuals between the congregations. Throughout the merger implementation a subcommittee was established to examine and make

recommendations on governance structure in the congregation.

With the particular issue of church governance, a high number of respondents indicated, “Undecided.” Respondent #38 wrote, “I am undecided about governance and future church mergers because others are more responsible for these things and have better insight than my opinion.”<sup>11</sup> In this comment, the notion expressed is that the congregational governance is the responsibility of other people in the congregation. This respondent is undecided about the governance because he or she is willing to let others attend to this matter. In all, approximately 20% of the respondents answered “Undecided.” In this item of assessment, a portion of people who are disinterested in attending to the governance matters of the merger is evident.

A significant group of respondents in this item would rather not make any changes to the governance of the congregation. In total, twenty-six (26) respondents answered that they “Agree” or “Strongly Agree” that no changes were needed in the governance of the merged congregations. One respondent offered this perspective, “About #4: Governance is good, but there are TLC “main church” habits and forms in the office that still need adoption to the two facilities in order to achieve inclusiveness.”<sup>12</sup> The comment reveals that many who agree that no changes are needed in church governance believe their pre-merger congregation’s method of governance should be followed on both campuses. This particular comment came from a respondent of the pre-merger Trinity Lutheran Church, rather than the pre-merger Christ Lutheran Church.

A great percentage of respondents from the pre-merger Christ Lutheran Church agreed that no changes were needed to church governance. Half of all respondents from the pre-merger

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<sup>11</sup> See Appendix Six, Respondent #038.

<sup>12</sup> See Appendix Six, Respondent #044.



Christ Lutheran indicated that they “Agree.” No respondents from Christ Lutheran indicated they “Strongly Agree” when asked about church governance. Respondents from the pre-merger Trinity Lutheran were more polarized in their responses. One-third of respondents indicated that the current church governance was insufficient indicating that they “Disagree” or “Strongly Disagree” that the current church governance was sufficient. In addition, the pre-merger Trinity Lutheran Church also had half of the respondents (16 total responses) who indicated that the current governance was sufficient. A total of four (4) respondents from Trinity Lutheran indicated that they “Strongly Agree” with Item #4 of this survey.

As discussed in the Doctrine of the Church (Chapter 2), congregational governance is an important matter that should always serve the mission of the congregation. In this particular matter, the congregation clearly needs to re-visit or continue examining the congregational governance to evaluate whether or not the governance structure is adequately serving the mission or hindering it. In light of the fact that ten (10) respondents marked “Undecided” to this item, the only thing that can clearly be determined here is that there is more work to be done. This becomes especially important when considering all the responses as a whole. A little more than half of the all respondents (54%) agreed or strongly disagreed with the item in statement in Item #4. Also nearly half of all the respondents (46%) were undecided or disagreed with the statement in Item #4. The merged congregation will have additional work in the area of governance and structuring the ministry in a manner that facilitates the missional, multisite goals it has set in the Articles of Partnership.

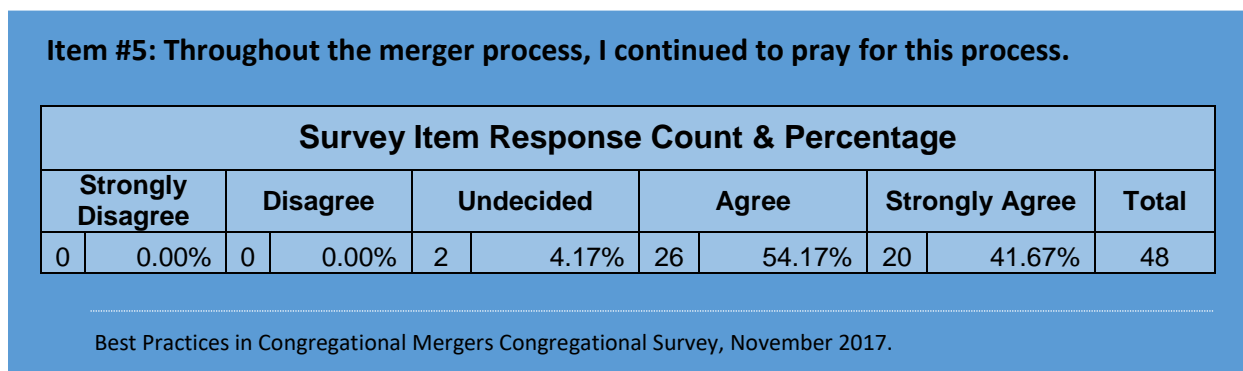
In conclusion, the item in this survey discussing the governance and structure on the newly merged congregation is potentially divisive. Since this challenge was recognized by both the Exploratory Team and Implementation Team throughout the process, it was also addressed in the

final article of partnership when the congregations agreed,

A merged Governance Committee will review, update and draft a new constitution, in accord with The Texas District of the Lutheran Church – Missouri Synod a constitution and bylaws shall be submitted to the District Committee on the Constitutional Review for approval by the Texas District LCMS Board of Directors in accordance with the Lutheran Church – Missouri Synod’s By-laws.<sup>13</sup>

The newly merged congregation will need to continue working on its governance and structure to facilitate mission in the most non-divisive manner possible.

Figure 6: Survey Item #5



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

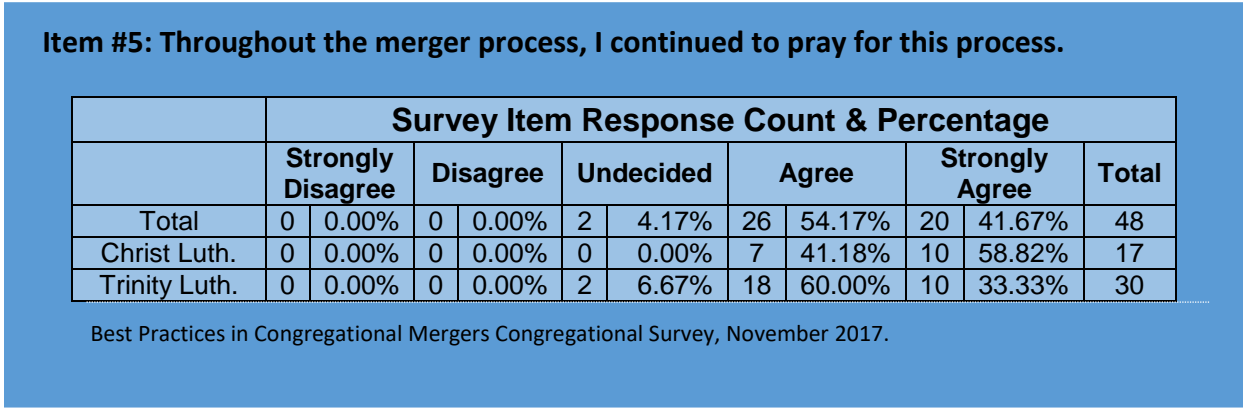
While the most divisive responses were in Item #4, the most unified responses rightfully appear in Item #5, which asked respondents whether they prayed for the process throughout the merger. In this item the responses were overwhelmingly similar. Out of forty-eight (48) respondents to this item in the survey, a total of forty-six (46) respondents indicated that they “Agree” or “Strongly Agree,” indicating that members of both pre-merger congregations were actively praying for the church merger at a level of more than 95%.

No respondent indicated that they “Disagreed” or “Strongly Disagreed” with praying

<sup>13</sup> See Appendix One, Article 12.

throughout the process. Two (2) respondents indicated that they were undecided about their prayers throughout the merger process. These two respondents were both from the same pre-merger congregation, Trinity Lutheran. Also, members of the pre-merger Trinity Lutheran were more likely to mark “Agree” than “Strongly Agree.” At the pre-merger Trinity sixty percent (60%) of the respondents marked “Agree” rather than “Strongly Agree.” Comparably, at the pre-merger Christ Lutheran only forty-one percent (41%) marked “Agree.” At the pre-merger Christ Lutheran a total of nearly fifty-two (52%) responded, “Strongly Agree” about praying for the merger throughout the process. These results are shown side-by-side in Figure 7. These results may indicate that the members of the pre-merger Christ Lutheran were more fervently praying for the merger process.

Figure 7: Survey Item #5 by Pre-Merger Congregation



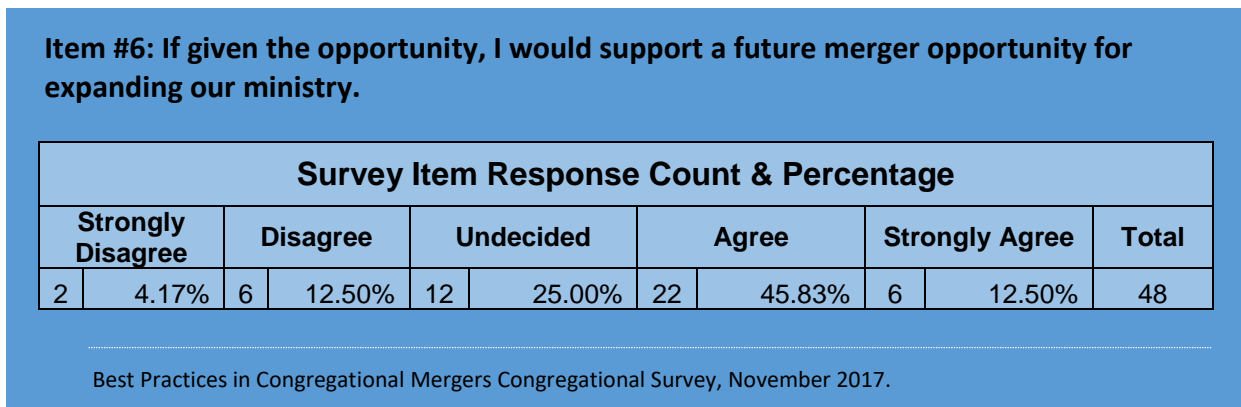
Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

Throughout the merger process the prayers raised to God from the respondents were mostly unguided or unscripted. The congregations did not publish any prayer guides at any time during the merger process. This may be important to note because the prayers raised were unscripted and were mostly extemporaneous in nature. While no specific prayers were published for this

process, the congregations were regularly requested to keep the process in their private prayers. These requests were made through announcements at Sunday worship services as well as calls for prayer through the congregations’ monthly newsletters.

Item #5 demonstrates the congregations’ desire to keep the whole process in prayer. Prayer is evidenced here as one of the most important components of the merger process. Prayer was so important that one respondent would comment on Item #5 simply with the words, “A lot!”<sup>14</sup> It is obvious that prayer needs to be intentionally considered a best practice for church mergers.

Figure 8: Survey Item #6



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

The final item in the congregational survey was to assess the general openness of the merged congregation towards a willingness to repeat the process. At the heart of this one item is the general perception of positive or negative feelings toward the merger process as a whole. The assumption represented in this item is that any future merger would necessarily support the expansion of the congregation’s new multisite ministry approach. This is the first time in recent

<sup>14</sup> See Appendix Six, Respondent #045.

history that either congregation has been part of a church merger. In short, a positive experience with this church merger toward multisite ministry could lead to openness towards repeating the process for the right missional reasons. However, a negative experience in this process would lead to a lack of support towards future opportunities. Item #6 is by no means meant to be a binding a commitment on the part of the respondent. It is merely a hypothetical “If given the opportunity...”

The results for this particular item of the survey are somewhat mixed. A large majority of respondents report they would support another merger opportunity for the purpose of expanding the ministry. Twenty-eight (28) total respondents indicated they “Agree” or “Strongly Agree” with this statement. This is more than fifty-eight (58%) of all the respondents in the survey. These results should be encouraging for the overall receptivity of the church merger process in the newly merged Trinity Lutheran Church and Trinity Lutheran Church Woodlands.

The ramifications of this item are not all good. While there is a general core of positive responses, the survey respondents also clearly demonstrate that it must be the right opportunity. There is a full one quarter (25%) of respondents who indicated they were “Undecided” about the possibilities of future mergers. One respondent described it this way, “#6 seems to suggest ‘any merger’ opportunity – there could be numerous reasons not to pursue certain mergers, thus my undecided mark.”<sup>15</sup> This comment emphasizes that for a future church merger to be considered and actually pursued, it must be for the right reasons and beneficial to the overall ministry. As the respondent has indicated, not just any merger is the right merger.

In addition to the group of respondents who indicated they were “Undecided” a significant group of people indicated they are not open to the possibility of any future church mergers. In

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<sup>15</sup> See Appendix 6, Respondent #018.

response to Item #6 of the survey, six (6) respondents indicated they “Disagree.” An additional two (2) respondents indicated they “Strongly Disagree” with Item #6. This group of eight (8) total respondents represents nearly seventeen percent (17%) of the group.

One respondent who indicated that they “Strongly Disagree” wrote, “#6: I don’t think we should expand any further until we work out all of the issues with the current merger.”<sup>16</sup> This comment may express some of the common concerns in the congregation regarding the timing of church mergers. The comment also reemphasizes that not every merger is a healthy merger. A merger that moves towards a multisite ministry must be the right opportunity, not just any opportunity. Those respondents who have disagreed with this last item of the survey bring the voice of caution to those who would readily be open to another merger process given the right opportunity.

In this section we have examined the response to six survey items sent to the survey respondents. Each item has been reviewed in detail with insights and observations towards the total merger process. In this section we have included various respondent comments where they are helpful and accurate to the actual merger process. Not all respondent comments have been included in this section.<sup>17</sup> Only the respondent comments reflective of individual survey items have been included where expedient. The general response to survey items has been very positive. With this review of the individual survey items complete, the next section examines the statistical information of demographics provided by the respondents.

### **Findings and Analysis of Survey Statistical Information**

This section examines the statistical information provided by the respondents of the

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<sup>16</sup> See Appendix 6, Respondent #045.

<sup>17</sup> A full report of all survey comments that were received from all respondents is contained in Appendix Six.

congregational survey. The survey respondents were asked to provide information anonymously about themselves that included the following:

- Pre-Merger Church Membership
- Age Group
- Gender
- Ministry Involvement
- Worship Attendance Frequency

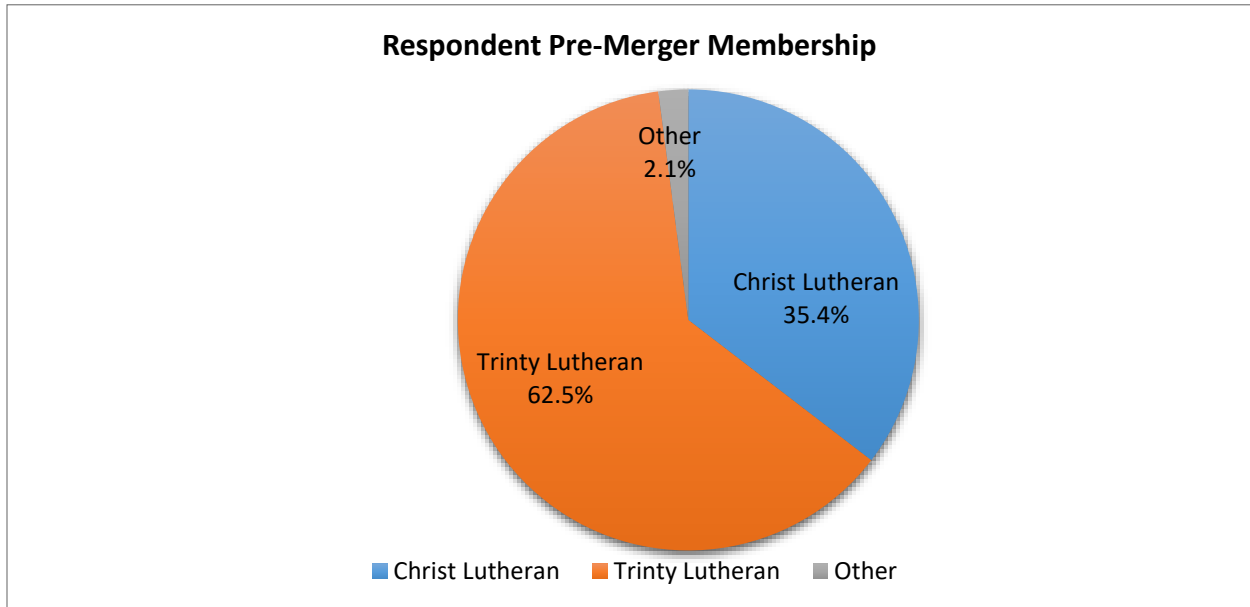
This statistical data is reviewed and evaluated in two ways. First, the overall data is reviewed for all respondents to the survey. Second, the statistical data for each pre-merger congregation is also reviewed separately. Treating the data collectively from both congregations enables a view of the merged congregation. Also, examining the data based on the pre-merger congregational membership highlights differences between the two congregations and help us gain insight between them.

A total number of forty-eight (48) responded to this survey.<sup>18</sup> Among those responding to the survey, seventeen (17) respondents were from the pre-merger Christ Lutheran Church while, another thirty (30) of the respondents were from the pre-merger Trinity Lutheran Church. One respondent in the survey reported not being a member of either congregation; however, this individual was eligible to participate as a staff member of the ministry.

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<sup>18</sup> See Appendix Seven: Table 11.

Figure 9: Survey Respondents by Pre-Merger Congregational Membership



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

As seen in Figure 9, the pre-merger Christ Lutheran congregation represented 35.4% of the survey response and the pre-merger Trinity Lutheran represented 62.5% of the response. These response rates could be expected because the Trinity congregation was much larger than the Christ congregation prior to the merger. The most under-represented group is most likely staff members who are not members of either congregation. There were only two respondents reporting as staff members participating in the survey. One staff member also reported being a member of the pre-merger Trinity congregation. Only one staff member who also was not a member of the congregation participated in the survey. Overall, staff who are not members of either congregation, with the exception of one, elected not to participate in the survey.

Most survey respondents reported being active members of the congregation. Out of the total respondents forty-three (43) reported being active members of the congregation;



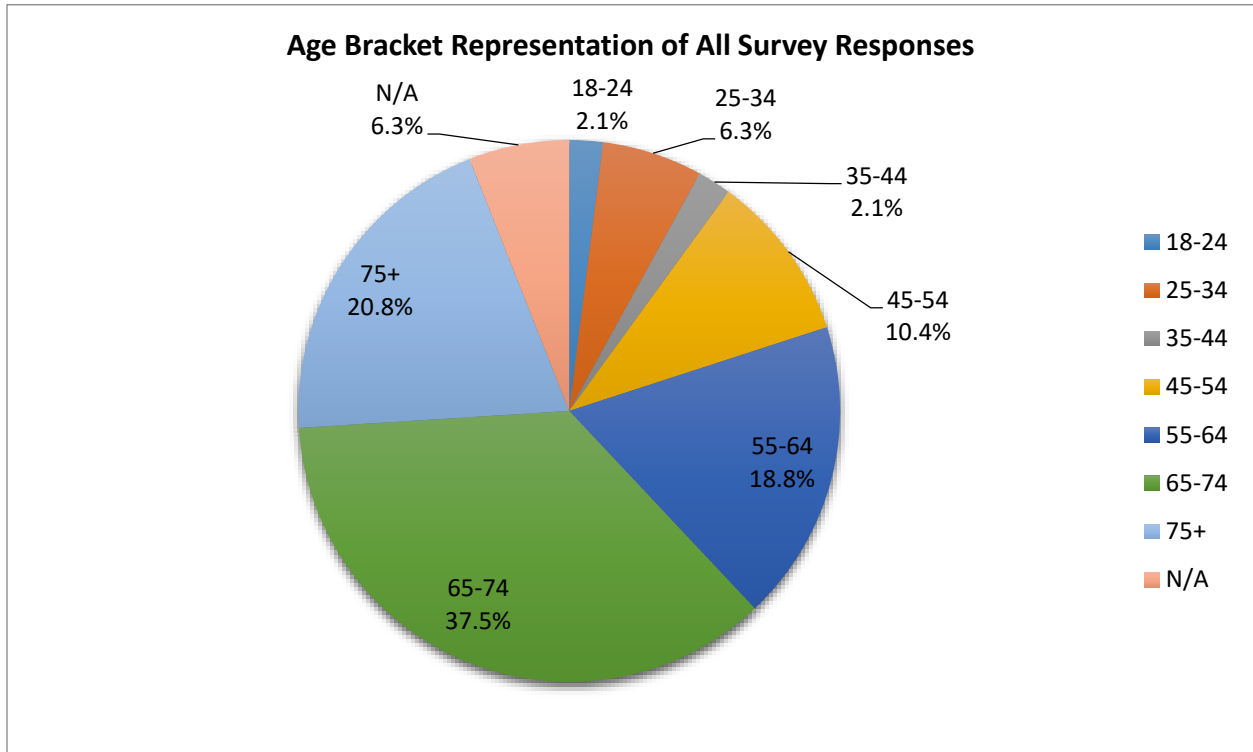
representing 89.6% percent of the respondents.<sup>19</sup> When the respondents were asked how frequently they attend worship, only 38 respondents responded that they attend 3-4 times per month. This is only 79.2% of the total respondents. A full 10% variance exists between what respondents describe as being “Active Members” and attending church as often as possible. This provides some evidence that church members no longer define active church membership as attending worship nearly every Sunday. Attitudes and behaviors that define active church membership are not the focus on this survey. The data is noted here based on what the respondents have self-reported.

Respondents were also asked to report a general age bracket in the survey. When examining the general age brackets reported by all respondents a very lopsided reality is evident. Figure 10 (below), provides information on the various age brackets of the 48 respondents in this survey.

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<sup>19</sup> See Appendix Seven: Table 11.

Figure 10: Represented Age Groups of All Survey Respondents.



Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

As seen in Figure 10 the overwhelming majority of survey respondents were among the oldest age groups in both congregations. Nearly 21% of the respondents in this survey were age 75 and over. Furthermore, more than half (58.3%) of respondents reported being over the age of 65, and only a tenth (10.5%) of the survey respondents reported being under the age of 45. The age bracket reporting for this survey indicates a church merger of older and aging individuals in ministry. The congregational membership rosters are more evenly balanced than Figure 9 indicates. However, Figure 10 does accurately illustrate the challenge that the merging congregations are facing, namely aging. Figure 10 also accurately illustrates that it will be important for the merger and resulting multisite ministry to reach new and younger people for the long term viability of this ministry.

Another challenge facing the ministry is the constant need to get more men involved in the

ministry. The respondents of the survey were asked to indicate their gender. The respondents to this survey were mostly female. Among the total respondents 29 of the 48 were female representing 60.4% of the group.<sup>20</sup> There were 19 males, representing 39.6%.<sup>21</sup> This response indicates that the congregation may have a challenge getting more males involved in the ministry.

Through the statistical data the respondents have provided a basic snapshot of information about themselves, as well as the necessary information about how they responded to the individual survey items. Since an in-depth examination of each item is presented in the previous section of this chapter we turn our attention to the survey items overall.

Each item of the survey was given an Average Response Agreement Score, which could be calculated by averaging the total responses of each respondent. This Average Response Agreement Score reveals which items had highest agreement among survey respondents. It also indicates to us which items of the survey had the lowest level of agreement among all respondents. The Average Response Agreement Score is reported in Appendix Seven: Table 11.

The item of the survey with the highest agreement among all survey respondents is Item #5, “Throughout the merger process, I continued to pray for this process.”<sup>22</sup> This item received an average agreement score of 4.375. This is the only item of the survey that received no responses of “Disagree” or “Strongly Disagree.” This item related to prayer had 96% of respondents indicating that they agreed or strongly agreed with praying for this process.

The item with the second highest agreement score was Item #3, “The merger of our two

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<sup>20</sup> See Appendix Seven: Table 11.

<sup>21</sup> See Appendix Seven: Table 11.

<sup>22</sup> See Appendix Four: Item #5.

congregations has been beneficial to both congregations.”<sup>23</sup> This item received an Average Response Agreement Score of 4.021. Out of 48 respondents only 2 individuals indicated that they disagreed with this statement. No respondents strongly disagreed with this statement. Out of the 48 respondents to the survey, 38 indicated that they “Agree” or “Strongly Agree” that the merger has been beneficial to both congregations. Items #3 and #5 are the only items in the survey that received an Average Response Agreement Score above a “4”.

When examining the statistical data for all respondents another fact becomes evident. The Total Survey Item Response Count,<sup>24</sup> indicates each item of the survey had a significant number of responses marked “Undecided.” In each item of the survey those marking “Undecided” about a particular survey item were between 12% and 25%.<sup>25</sup> This high number of “Undecided” responses indicates a significant level of uncertainty about the merger process as a whole. With no previous, recent history of church mergers from which to draw, the membership of the congregations involved are experiencing something new. The level of uncertainty may be justified given that a merger process is not everyday church business.

There is one exception to the level of uncertainty indicated by the “Undecided” responses. Item #5 of the survey asking about prayer for the process received a significantly lower number of “Undecided” responses than any other item in the survey. While the merger process might be new to the congregations, they do understand that this process is something they commit to God in prayer. Only 2 responses were marked “Undecided” for Item #5. This translates well into a best practice for mergers because in the midst of uncertainty those involved in the merger

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<sup>23</sup> See Appendix Four: Item #3.

<sup>24</sup> The Total Survey Item Response Count is documented as the final section of Table 11, Table 12 and Table 13 in Appendix Seven.

<sup>25</sup> See Appendix Seven: Table 11.

continue to be supported by prayer.

The statistical results were also tabulated specifically by each pre-merger congregation. The reports for the total statistical data separated for each congregation are contained in Appendix Seven in Tables 12 and 13. Table 12 shares the details of results related to the respondents from the pre-merger Christ Lutheran Church. Table 13 shares the details of the results related to the respondents from the pre-merger Trinity Lutheran Church. These separate reports reveal additional insights regarding the congregational merger survey that are specific to each pre-merger congregation.

In Table 12 we can see, as stated above, 17 respondents reported being from the pre-merger Christ Lutheran Church. One of the most obvious facts in Table 12 is the information regarding the age groupings from the members of this congregation. No one under the age of 55 completed a survey from the pre-merger Christ Lutheran. All of the respondents from Christ Lutheran Church reported being in the top three age brackets of the survey. The lack of younger people participating from this congregation is significant. It is important to include young people in the multisite merger ministry if it is to endure into the future. The merger and new multisite ministry will outlive any of the participants of this survey at any age, especially those respondents in the oldest categories.

Additionally, the lack of young people may have created a sense of urgency to merge and revitalize the Christ Lutheran ministry in the newly merged congregation. Christ Lutheran's responses were much more in agreement than either group in the survey. When examining the Average Response Agreement Score for responses from Christ Lutheran, the scores were generally much higher. Pre-merger Christ Lutheran had average agreement scores above a "4" for three separate items in the survey, including Item #2, Item #3 and Item #5. This increased

level of agreement reflects a greater openness and enthusiasm for the church merger.

When considering the responses of Table 13 from the pre-merger Trinity Lutheran Church, these respondents are much more varied in the information they provide. A total of 30 responses were received from the pre-merger Trinity Lutheran Church. Among these responses every age group is represented by at least one response. The pre-merger Trinity congregation also has representative responses from all areas of ministry involvement. The responses for pre-merger Trinity Lutheran are much more broad in nature and well-balanced.

An additional feature of the responses from the pre-merger Trinity Lutheran is the difference displayed in the congregation's Average Response Agreement Score for the six items listed as survey questions. The pre-merger Trinity respondents only have Item #5 with an average score of a "4" or higher. The rest of the Average Response Agreement Scores are lower than a 4 and also lower than those of Christ Lutheran.

In this section we have examined the statistical data of the Best Practices in Congregational Mergers Congregational Survey from November 2017. We have examined this statistical data as a whole from all respondents who participated and have also examined this data from the groupings of pre-merger congregational membership. The statistical data is fully reported for these three groupings in Appendix Seven of this MAP. In the next section our attention turns to the findings and available analysis of the Focus Group discussion.

### **Findings and Analysis of Focus Group Feedback**

In a final stage of evaluation for this project it was necessary to convene a small focus group. The Focus Group was designed to provide more specific feedback about the merger process than could be obtained by a general survey. The members of this focus group were selected from the merger Implementation Team that included key, active leaders from both pre-

merger congregations.

This focus group was assembled on November 9, 2017, in the context of a regularly scheduled Implementation Team meeting. Due to the nature of scheduling for members of the focus group it was necessary to obtain the focus group comments in the context of a meeting already scheduled. Focus group feedback was being obtained in the context of other committee work. It is important to distinguish that the feedback provided here was separate from the group's other business of the meeting. In order to provide focus group feedback, a separate agenda item was created and communicated to facilitate the separation and transition of this information. Also, consent to use their comments anonymously was obtained. Those comments are presented in Appendix Eight of this MAP.

The first of two questions presented to the focus group was, "What do you believe are some of the things our congregations did well in the merger process so far?" In an effort to start this evaluation on a positive note, we began with the questions about positive steps made in the process. One member of the focus group commented, "The opportunities abound and are exciting." Many members of the focus group agreed with this comment, although no follow up comments were offered. Another member of the focus group commented, "Once everyone got on board it (the process) worked well." This comment directed attention to the level of communication provided to the congregation. This provided the opportunity for another participant to say, "The more we communicate the better it goes with the congregation."

The second of the two questions presented to the focus group was, "What do you believe are some things our congregation did not do well in the merger process so far?" This question received more feedback than the first question. The five main comments made in reference to this question are stated in Appendix Eight. This question generated significant murmur among

the focus group indicating not every comment was stated for the group's benefit. The focus group as a whole fixated on the five comments stated in Appendix Eight. The first comment made in answer to this question was, "We stumbled badly coming out of the blocks. The core group wasn't told."

This comment generated a conversation about who the core group of people should have been among the congregations involved in the merger. This led one participant to state, "We needed lots of openness and certain people didn't feel we had it." Some members exposed a sentiment that "certain people" felt they needed to be in charge. This conversation exposed the attitude that unless "certain people" gave permission for this to take place within the congregation it simply could not happen. Another participant, in response to the previous comment stated, "There was a core group that was told and started the process, but maybe it wasn't the right core group."

The insight to be gained through this feedback is that there are always various members of the congregation who have an extreme sense of ownership about the ministry. The pioneering, rugged ownership and protectionism common to residents of the Texas Panhandle can generally serve ministry well. The people who live in the Texas Panhandle often have a high sense of passion and ownership in ministry. If "certain people" are not part of the process from the very beginning, they are threatened by the newness of something happening they didn't start themselves. While a high level of ownership and passion of ministry can be a tremendous blessing, it can also be a stumbling block to new mission efforts.

Much of the focus group's feedback on the second question centered on the need for more communication about the merger process. As we learned in Chapter 3 of this MAP, communication is key to a successful merger. Clearly, congregational leadership cannot



communicate enough. They cannot over-communicate the events of a merger process, but they should certainly try to do so.

One of the participants responding to the second question stated, “Wish we had started sooner.” This comment was stated in the spirit of constructive criticism and the sentiment that the blessings in the merger could have come sooner. Certainly, there are some participants who share the sentiment of this statement. However, we can also look to the congregational survey and find numerous statements also expressing the sentiment of those who wished we had not started at all.

Another aspect of this statement is that the church merger process was taking longer than any participant in the process imagined. Even the timing of this MAP was altered due to the extended time frame this merger required to be completed. With the extended time table, due to circumstances beyond anyone’s control, there were those who wished we had started the process sooner. The leaders involved did set time tables and made tentative deadlines. It was important for the sake of the process and the health of the newly merging congregation to be flexible in this process. The importance is not in how quickly a congregation can complete a merger, but that the merger is done well for the sake of the Gospel.

The focus group feedback was limited in nature. The participants in the focus group did not spend a lot of time answering the two questions presented to them. The most ideal format for these questions and resulting feedback would be a stand-alone meeting for this specific purpose. However, the limited feedback provided by the focus group did bring to light new information and helpful insights necessary for understanding what some of the best merger practices need to be.

In conclusion, throughout this chapter the evaluation of this project has been explored. This

evaluation began with a congregational survey and concluded with focus group feedback. The congregational survey used a Likert scale inventory to assess levels of agreement about six different aspects of the merger process. This chapter examined each item of the survey individually with insights noted for drawing conclusions to best practice recommendations discussed in the next chapter.

After examining each survey item individually, there was an examination of the demographic statistical data. The survey contained a number of demographic questions about each respondent. This demographic data generated a significant amount of statistical data that was evaluated in two main ways. First the statistical data was evaluated as a collective whole from all respondents. Second the statistical data was evaluated on the basis of pre-merger congregational membership. Each examination of the statistical data evaluated provides additional insights and information crucial to the recommendations of best merger practices presented in the next chapter.

The final evaluation in this project was through the use of collecting qualitative data from a focus group. The two congregations assembled a merger implementation team, representative of both pre-merger congregations. This merger implementation team served as members of the focus group, offering additional insights centered around two main feedback questions. The feedback provided, exposed some thoughts and attitudes not previously revealed by other methods of quantitative evaluation. While most of the feedback provided by the focus group centered on sufficient communication, other insights were also gained.

In this chapter we have conducted three methods of evaluation for this project. Each layer of evaluation has offered unique findings and analysis that are helpful for drawing conclusions regarding the best merger practices for multisite ministry. With the evaluation complete, the next

chapter discusses and presents the various findings discovered through this project.

## **CHAPTER SIX**

### **CONCLUSION**

In this final chapter, the conclusions, recommendations and the contributions that this project has made to ministry are presented. The concluding data are presented in three ways. This chapter begins with sharing the general contributions this project has made to overall ministry. After a discussion of contributions to ministry in the first section, the second section presents the primary goal of this project.

The second section of this chapter provides “Best Practice General Recommendations.” The purpose of this MAP was to evaluate the merger process of Trinity Lutheran and Christ Lutheran congregations, seeking to make recommendations towards a best practice in church mergers specifically for multisite ministry. The concluding thoughts of this section provide the closure necessary for the stated purpose of this project. It is these recommendations that will be published and presented to the congregation as a result of their participation in this study and the merger process as a whole.

The final section of this concluding chapter discusses the various topics and questions that were revealed by this project that are deserving of further study. This section demonstrates that this project has created new topics for exploration and research. It was Helen Keller who said, “A well-educated mind will always have more questions than answers.”<sup>1</sup> Those words of wisdom certainly hold true in research of this nature.

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<sup>1</sup> Keller, Helen, at A Z Quotes, Last Accessed, October 1, 2018, <https://www.azquotes.com/quote/547768>.

## **Contributions to Ministry**

The first and most obvious contribution this project has made to ministry comes in the personal and professional level of pastoral care enabled by the constant growth, research and learning required by the pastor involved. The author of this study has embraced a habit of regular continuing education that shapes and hones skills helpful to the service of his congregation. The taxing commitment required to complete this project has continually challenged the author in balancing constant ministry demands with the compelling desire to learn, research and grow. The author reports tremendous growth through this whole process.

This church merger has had a dramatic effect on the congregational ministry making numerous contributions. When surveyed or asked about the merger, most report the merger is having a positive impact on the overall ministry of the congregation. The time spent evaluating the merger process through this project has helped the congregation better understand its experience and progress in the midst of it.

Another important contribution to the overall ministry is that this research project has helped the two congregations examine what is important. The congregations have been examining the importance of their communication. The congregations have also intentionally examined operational policies and procedures in ministry. The merger process has helped the congregation look more outward, past themselves, rather than be inward focused.

## **Best Practice General Recommendations**

In this section we examine the purpose for which this project was started. The purpose of this MAP was to evaluate the merger process of Trinity and Christ Lutheran congregations for Best Practices in Mergers for Multisite Ministry. Through the evaluation process, along with the literary research provided above, the following recommendations are submitted as the best

practices for church mergers for multisite ministries. A brief discussion how these recommendations might be considered or implemented following these recommendations.

#### Best Practice Recommendation 1: Saturate with Prayer

This recommendation tops the list because based on the information in this project, it was the most important part of the process for the members of the congregation. Certainly the newly merged congregation should continue to call for prayers over the merger and multisite launch process. However, the recommendation here is to saturate the process with prayer. The merging congregations relied on private prayers and periodic calls for prayer through various congregational communications. It is recommended that merging congregations create a prayer team whose sole responsibility is to pray and encourage others to pray over the merger process.

The merging congregations can and should publish prayer guides, prayer requests or other resources encouraging their members to pray for this process. Scripture assures, “The prayer of a righteous person has great power as it is working” (James 5:16). Therefore merging congregations who hope to transition into multisite ministry must intentionally saturate the process in prayer.

#### Best Practice Recommendation 2: Attempt to Over-Communicate

Just as the first recommendation is to be in regular communication with God, it is in that same spirit that this project recommends regular communication with the membership of the merging congregations as well. In the evaluation of this project, it was discovered that communication cannot be over emphasized in this process. Feedback comments offered during the focus group session explicitly discuss the challenges the merging congregations face without sufficient communication. There is no exact standard to achieve over-communication. However, if those tasked with the merger were to seek to over-communicate, then they would likely not

face some of the communication challenges that the Trinity and Christ congregations shared in this merger process.

Another benefit may exist with the effort to over-communicate. With clear communication the merger may be served well by a greater number of people wanting to get involved. It was clear in the survey demographics that those most interested in the merger process were older members of the congregation. Clear communication that is constant and maybe even over-done may assist in the effort to enable communicant members of all ages to get involved and assist with the merger process. It is often said that every congregation struggles with communication. In a merger process, it is especially important that communication be done well and done extremely often.

#### Best Practice Recommendation 3: Focus on Mission, not Uncertainty

Church mergers are not every day business. Church mergers are unique to each set of congregations going through the process. Even with prayer and great communication, there will still be uncertainties. The congregational survey featured numerous responses of “Undecided” when asked about the merger process. In addition to these uncertainties, some members of the congregation expressed concerns and fears that were inaccurate or sometimes false.

With communication done well, it is important to focus on the mission of the merger and multisite, Gospel-centered ministry. It is important to answer questions as completely and fully as possible how this ministry will be carried out. All of the communication must facilitate the mission of the multisite merger. When the multisite mission vision and goals are front and center in the communication, then uncertainties, rumors and false information can be minimized.

#### Best Practice Recommendation 4: Be Flexible

There is no exact amount of time for how long a church merger should take to complete. In

this congregational merger, deadlines, goals and timelines were set and understood. Some events took place beyond anyone's control, making it necessary to extend those timelines. A certain amount of flexibility is necessary in the merger process.

The congregations involved in this merger adopted a two-tiered merger process. The ecclesiastical tier involved the merged worship life and all spiritual care of the congregation as well as congregational life activities of fellowship and worship. The second tier was the legal requirements of the merger process with the necessary local and state authorities. Much of the ecclesiastical tier went as planned and continued to be a blessing. Certain legal requirements took longer to complete than originally anticipated. When the legal requirements did not go as planned, they were often considered by many as setbacks. Flexibility on the legal tier was necessary to complete all the steps which took longer than anticipated.

In the midst of setbacks, a view of the larger picture of missional purpose for the multisite merger must remain in view. Allowing for additional time and being flexible in the merger process allows the merged congregations to become a merged ministry that works and grows together by God's grace. This is a benefit that will serve the movement towards multisite launch of new ministry later in the process.

#### Best Practice Recommendation 5: Get Legal Assistance

In the church merger process it would be wonderful to only concentrate on proclaiming the Gospel. This is not realistic in the process of church mergers. The congregations involved in this church merger hired legal representation to assist the two congregations in the process of coming together legally. There are numerous steps involved with government authorities that are necessary to complete a legal merger as a legal organization. Appropriate legal representation will be worth the financial expense necessary to get the process completed in a timely manner.



### Best Practice Recommendation 6: Choose a Governance and Use It

A feature of the LCMS is the concept that every congregation is self-governed. This concept was discussed in the study of the Doctrine of the Church in Chapter Two. The self-governance, congregational polity of the LCMS is a feature that is to support and advance mission work. The governance of the congregation is to facilitate her mission not impede it.

One of the Articles of Partnership created in this merger process was to carefully examine the differences between the two merging congregations' governance and make recommendations for a unified, or merged governance. The congregational survey in this project demonstrated some of the more varied responses of the survey. While some respondents believed the current congregational governance was sufficient, others disagreed. It is clear from the survey responses that there is more work still to be done for these merged congregations on the topic of their governance. It is a challenge they continue to address.

The governance of the congregation is important as it provides structure to serve the mission of the congregation. No two congregations have the exact same constitution, bylaws or governance. Although often times similar, merging congregations must choose a system of governance that serves and enables them to operate for the benefit of their mission. This best practice recommendation to choose a workable system of governance, means that it must be used and work for the benefit of accomplishing the merged multisite mission.

### Best Practice Recommendation 7: Names Are Important

As two congregations merge, the name recognition of the congregation is important. In the congregational survey, there was some uncertainty about the naming of the new multisite ministry that would rise out of the congregational merger. In this specific case the merged congregations eventually agreed on a name as stated in the Articles of Partnership. The surveys

reported that the naming process could have been better communicated. Names are important in the merger process as they assist the congregation to establish an identity in the community as a multisite organization.

#### Best Practice Recommendation 8: Be Honest About Challenges and Opportunities

Based on the information that has come from the survey results and focus group feedback, it is important that integrity is maintained in the church. A church merger to advance the Gospel in a new multisite setting such as this will encounter challenges. It is important for church leadership to clearly communicate those challenges and also the opportunities they represent. As was noted in the survey result comments,

Concerned now that our attendance is not at the levels that we had years before the merger. Have many quit coming because of the merger? Our evangelism (or lack of a better word) may have stopped with our present members. If this continues both of the previous congregations may fail. We can't lose \$20,000 a month and stay present in the community!<sup>2</sup>

On one hand, these comments were never communicated as fact from church leadership as the facts and concerns alleged in these comments were inaccurate. On the other hand, the church leadership did not over-communicate the opportunities with the real information available to address these concerns. The recommendation based on the information presented in this project is that church leadership must be prepared to answer all matters relative to the church merger and subsequent launch of the multisite ministry to follow. This best practice is imperative for the benefit of unity within the congregation.

This recommendation is also important to dispel fear. The comments quoted above must be met with honesty about the opportunities and challenges the process is facing because of the fears that congregational members will face. In the few quoted lines above, the member shares

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<sup>2</sup> See Appendix Six: Respondent #014

fears about finances, worship attendance and ultimately both pre-merger congregations failing. These are real concerns discussed in the literature review of Chapter 3.

In Chapter 3 we discussed some of the common pitfalls that church-mergers face. Common pitfalls including “lack of clarity on non-negotiables,” or “over-promising and under-delivering” or even “looking back instead of forward.”<sup>3</sup> The common pitfalls discussed and then later exposed in the research demonstrates that church leaders must constantly communicate with honest integrity all of the opportunities and challenges the process encounters.

#### Best Practice Recommendation 9: Go!

The very first pitfall mentioned in Chapter 3 of this project was “waiting too long.” The feedback gained from the focus group is that some members of the congregation felt we should have started the process sooner. In the challenge of determining whether to pursue the church merger, we were given three possible questions to consider. Merging congregations are encouraged to ask whether the merger is possible, feasible and desirable.<sup>4</sup> Also, when congregations decide to “go,” they are also acting consistently with our Lord’s Great Commission to “go and make disciples.” Church mergers for multisite mission work are part of God’s mission-sending work in our communities.

In summary the best practice recommendations listed above are formulated by the literature review and speak directly to the feedback provided through the congregational survey and focus group information. These best practices can be presented to the newly merged Trinity Lutheran Church for follow up and evaluation of the process and the Articles of Partnership established for the merger. The newly merged congregation will need to continue to grow and learn from these

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<sup>3</sup> See page 66-68, in Chapter 3 there is a more complete discussion of common pitfalls.

<sup>4</sup> See page 54-55, in Chapter 3 these questions are explored in detail in the section of Crucial Steps.

best practice recommendations. In each of the best practice recommendations stated above, the congregation has done some things well and has also shown need to change, improve or continue to evaluate.

In addition to the opportunities for the newly merged Trinity Lutheran Church, these best practice recommendations are available to be shared with any Lutheran Church of the LCMS. There are, no doubt, other LCMS congregations that could benefit from considering whether they should be merging with sister congregations. There are no doubt other congregations that can learn from the experiences of this process at Trinity Lutheran as they consider merging, revitalizing or moving to a multisite model.

These best practices are not just useful for Lutheran congregations. These recommendations can also be useful beyond on the LCMS. Church mergers may not be all that common inside the LCMS, but other church bodies and non-denominational congregations are leveraging church mergers to advance their outreach and mission work. In Amarillo, Texas, where this project took place, there are several non-Lutheran congregations using the multisite model to advance their mission around Amarillo and throughout the Texas panhandle region. These recommendations can be useful beyond the Lutheran community.

### **Questions for Further Exploration**

In addition to the benefits of information learned through this process, this project has exposed a number of questions that can and perhaps should be researched further in congregational mergers for multisite ministry. Some of these questions are presented below.

1. Do mergers for multisite ministry increase worship attendance? Some in the congregation believe that worship attendance has declined during the process of merging the two congregations. Worship attendance numbers are tracked by LCMS congregations, usually for

LCMS reporting purposes. The general perception of going through a healthy merger is that congregations can be stronger together than they are separately. In addition, one of the reasons to launch into multisite ministry through a church merger is to reach new people with the Gospel. All of these thoughts lead to the assumption that worship attendance numbers should increase not decrease.

One of the questions raised by the process at Trinity Lutheran is whether worship attendance is growing or declining. Trinity Lutheran can and will monitor its own attendance numbers. Much of the literature about multisite ministries indicates that worship attendance and congregational membership numbers increase. The question presented here is to assess worship attendance patterns before, during and after the merger process. This research could be done within a specifically Lutheran context or within a larger Christian, multi-denominational context.

2. Do church mergers for multisite ministry provide better financial stewardship than other church planting models? Another question to be explored in the process of church mergers for multisite ministries is the impact the process may have on the financial stewardship of the congregation. Throughout this process the financial concerns of the congregation were expressed both in the congregational survey and in less official personal comments.

The opportunity for research in this question exists by examining the impact of the merger process on the financial expenses of the merged ministries. The interested researcher could study the financial data of the pre-merger ministries. Again this information is available in financial records and statistical reports similar to those in Chapter 4 of this MAP. These results could provide necessary information from congregations before, during and after the merger process.

Throughout the process congregational leaders of Trinity and Christ Lutheran have been generally watchful for expenses that can be consolidated or reduced as a result of the merged

ministry. The congregational leaders and church members have expressed the hope of realizing some savings of expenses in the midst of the merger process. Qualitative interviews along with other research can be conducted to find cost savings, if any, were found in the newly merged, multisite ministry.

An appropriate extension of this question comes when it is determined whether or not there have been any cost savings to the newly merged congregation. If costs savings have been discovered, the next question becomes how the realized savings are used within the congregation. Are the cost savings used for mission? Conversely, if the opposite result occurs in that mergers create new and additional expenses, how does the newly merged congregation prepare for those financial needs? It has been demonstrated that both congregations in this project have had their own concerns regarding the financial stewardship of congregations. Do church mergers help or hinder these concerns?

3. Who Controls Mergers? One of the more surprising items of feedback from the focus group was the stated implication of certain people needing to know from the beginning about the merger. The focus group revealed the thought that certain people should have had more control or information about the merger from the beginning. In Chapter 3 of this project, one of the considerations recommended for healthy mergers was the concept of “permission giving.” Where mergers take place for new multisite ministries, leaders need to be able to give permission to the new ministries that are taking shape as a result of the merger. In the focus group one of the feedback comments stated, “The core group wasn’t told.”<sup>5</sup> Another comment stated, “There was a core group that was told and started the process, but maybe it wasn’t the right core group.”<sup>6</sup>

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<sup>5</sup> See Appendix Eight: Comment 1.

<sup>6</sup> See Appendix Eight: Comment 1b.

This information acknowledges another opportunity for research. When it comes to the church mergers, which group of people make up the core group that must be informed for a merger to be successful? In the process of the newly merged Trinity, there were core groups from both pre-merger congregations on board and informed. Others still believed they were not informed and should have been for the merger to go well.

From a theological perspective, the idea of who is in control of a merger should obviously be God himself through the work of the Holy Spirit. With the guidance of the Holy Spirit, various groups of the merging congregations are expected to pull together. Perhaps this question could lead to the production of Bible Study, prayer, worship or other congregational materials to aid the process of core groups coming together. This would be especially important to those staff or laity tasked with communicating the merger and bringing everyone on board in the right manner and method. This could be an important topic of research to aid congregations so that God's gifts in church mergers for multisite ministries can be further realized to a greater extent in the church at large.

4. Does LCMS polity favor dual parish ministries over satellite ministries? In chapter 3 of this MAP the differences between satellite or multisite ministries and dual parishes were explored. This MAP also documented the significant guidance that the LCMS offers for creating dual parish ministries. The LCMS provides a little more than a definition of "satellite ministries" to provide some language to the multisite model. A further, in depth study of the differences between dual parish structures and multisite ministry models should be explored.

The differences to be explored could include data on which model is more common in the LCMS as compared to other church bodies. The LCMS seems to favor dual parish ministries given the context of the LCMS polity. Further study should be done to determine whether dual

parishes are favored because of the LCMS polity and governance model in place. Finally, more research is necessary on these two models in relation to each one's ability to facilitate missional kingdom growth.

All of the questions above provide further opportunities to explore the nature and blessing that church mergers can be to congregations. Through this project, we have explored some of the best practices in church mergers for multisite ministry. The recommendations given in this chapter are submitted to the newly merged Trinity Lutheran Church using the Recommendations for Best Practices in LCMS Congregational Mergers into Multisite Ministries as presented in Appendix Nine. In addition, for presentation purposes this summary as presented in Appendix Nine can also be converted to a presentation for congregational use.

The newly merged Trinity Lutheran Church will, as guided by the Holy Spirit, endeavor to launch into a multisite ministry as a result of a successful merger. Whether the recommendations are incorporated into this newly merged congregation's process or not, the lessons provided in these pages have already been beneficial to the ministry. The problem stated at the beginning of this MAP reads that the congregations "have not evaluated what has been helpful in the merger process" One of the biggest challenges in evaluating this process is that the demands of ministry, spiritual care and the life of the congregation continue even while trying to make the time for a thorough evaluation. This process of evaluating, learning and growing has already been beneficial to the ministry.

Church mergers for multisite ministry remain an opportunity that should be more seriously considered at other appropriate locations in the LCMS and beyond. The LCMS is faced with such challenges of perpetually declining congregations, continual congregational pastoral vacancies, and constant clergy shortages. Church mergers will not solve all these problems. As



we have learned, some mergers should not be pursued. However, the LCMS can seriously consider church mergers as part of the equation that meets our challenges and helps us turn the corner to be an integral part of extending God's Kingdom here on earth. To Him be the Glory!

## **APPENDIX ONE**

### **Articles of Partnership Document**

Merger Agreement for

Trinity Lutheran Church Amarillo, TX &

Christ Lutheran Church Amarillo, TX

Now come Trinity Lutheran Church (Trinity Lutheran) and Christ Lutheran Church (Christ Lutheran), and acting through an affirmative vote of their respective congregations, enter into this Merger Agreement (Merger).

Whereas, Trinity Lutheran Church is a Church founded in 1921 which is operated at 5005 Interstate 40 West in Amarillo, Texas and has been registered as a non-profit corporation under the laws of the State of Texas since August 1940; and

Whereas, Christ Lutheran is a Church founded in 1954 and has operated at 2400 N. Coulter St. in Amarillo, Texas and has been registered as non-profit corporation under the laws of the State of Texas since August 1954; and

Whereas, in the fall of 2015, the pastoral leadership of Trinity Lutheran Church and Christ Lutheran began conversation and prayerful consideration whether a merger of the two congregations would be beneficial to both congregations and Trinity Lutheran's stated mission "REACHING, TEACHING AND ENCOURAGING OTHERS THROUGH THE SAVING LOVE OF JESUS CHRIST"; and

Whereas, in the winter of 2015-2016, the Administrative Councils of both Churches

determined to explore the possibility of a merger further by the selection of members to a Trinity-Christ Exploratory Committee to explore issues related to the Merger of the Merger of the two churches; and

Whereas, there have been multiple information sessions conducted at both churches to explain the progress of the Merger talks and the required process for effecting the Merger; and

Whereas, on March 13, 2016 and April 3, 2016, the members of both Christ Lutheran and Trinity Lutheran approved the Merger of the two churches by a 2/3 affirmative vote of both congregations' members in a paper ballot vote; and

Whereas, upon joint approval of the congregations Christ Lutheran physically moved to Trinity Lutheran Church on May 15, 2016, and is conducting its worship activities at Trinity Lutheran Church, but continues to operate its child care facility and conduct other ministry and outreach activities at the former Christ Lutheran Church location since that time.

Now therefore come the members of Trinity Lutheran and Christ Lutheran and agree as follows:

1. Effective May 15, 2016, Trinity Lutheran and Christ Lutheran merged to worship as one church in accordance with the provisions of The Texas District of the Lutheran Church – Missouri Synod.
2. The name of the unified church will be: Trinity Lutheran Church.
3. The mission of Trinity Lutheran will remain: “REACHING, TEACHING AND ENCOURAGING OTHERS THROUGH THE SAVING LOVE OF JESUS CHRIST.”
4. The unified church shall operate as a non-profit corporation under the registration of Trinity Lutheran Church.
5. A name change will be filed with appropriate local, state, and federal entities to reflect

the change in name of the Christ Lutheran Church property and holdings to: Trinity Lutheran Church Woodlands – LCMS.

6. The assets, liabilities, income and debts of both churches will be combined into the financial records and holdings of Trinity Lutheran Church. Those assets will include all checking, savings, money market, certificate of deposit or other financial assets currently held by either of the two churches along with all real and personal property. This shall also include the building mortgages, but mortgages shall remain separate. Both church Finance Chairs (Comptroller/Treasurer) have already provided current financial statements to the other church. Prior to the legal effective date of Merger, the accounting firm of both entities will analyze the financial statements for accuracy. Upon the legal effective date of the Merger, the Implementation Finance Committee will insure the transfer of any funds into the accounts of Trinity Lutheran Church.
7. The existing governance committees including Boards of Elders; Boards of Trustees; Christian Day School Boards; Sunday School Boards; Youth Boards; Boards of Childcare Services and any other committees from both congregations combined at the regularly scheduled church elections in the summer of 2016.
8. Major ministry activities of both Church's, e.g. BBQ Sunday, Angel Breakfast, etc. will continue as outreach efforts of the unified Church as approved by appropriated boards and council.
9. The President, Vice-President, Treasurer, Trustees Chairperson, and Child Care Chairperson of Christ Lutheran will remain in those positions until the legal dissolution of Christ Lutheran Church. These representatives will be non-voting ex-officio members of the Church Council of Trinity Lutheran Church.

10. Worship services will continue at the unified Trinity Lutheran Church location at 8:00 am, 10:30 am, and 6:00 pm.
11. Staffing for the unified church at the time of the Merger will be as follows: Pastor Brian Hesse will serve as Senior Pastor, Mrs. Chaessa Koontz will serve as Director of Family Life Ministry, and Mr. Rick Ryan will serve as Principal of Trinity Lutheran Christian School. All other faculty and staff of Trinity Lutheran and Christ Lutheran at the time of the Merger will be retained in their respective positions subject to the review of the Church boards based on program and budget needs.
12. A merged Governance Committee will review, update and draft a new constitution, in accord with The Texas District of the Lutheran Church – Missouri Synod a constitution and bylaws shall be submitted to the District Committee on the Constitutional Review for approval by the Texas District LCMS Board of Directors in accordance with the Lutheran Church – Missouri Synod’s By-laws.

Attested by Appropriate Signatures.

## **APPENDIX TWO**

### **FAQ Document Titled: Our Partnership In Christ: FAQs**

#### **1. I'm confused. Is Christ Lutheran going to reopen in 2-3 years as a stand-alone church?**

No. This partnership is a full dissolution of Christ Lutheran Church, with their church partnering with us in a new multi-site ministry. This ministry will be Trinity Lutheran Church and there will not be a relaunch of Christ Lutheran Church. Their ministry is well aware of this and decided in faith to move ahead. The best example in Amarillo of this is Hillside Christian and Trinity Fellowship who have many worship sites, but one ministry.

The relaunch of worship that was discussed is an additional worship site of Trinity Lutheran church. The district office has made it very clear that when we relaunch that worship, that we name it something new and different to help with any confusion. This is why we have used the language of Trinity Lutheran: North Campus.

#### **2. Can you explain a little bit more about the SMP program?**

Sure. The Specific Ministry Pastors program was designed by our seminaries to help train men in “specific ministries” in their current area. In many ways, it is the way that we train pastors and ministers throughout the world in meeting the needs of people in China, Africa, Latin American, etc.

The seminary also sees it as an advantage for local congregations who are doing new ministries that could be served by this option. In our case, our multi-site model allows us the

ability to create and design a role for our SMP candidate to meet the needs of our “one ministry, two locations” model.

This candidate will be called by Trinity Lutheran Church for this sole purpose. This allows us the flexibility of two pastors that can be used at either site for ministry needs.

### **3. Will he be eligible for a call later?**

In terms of calling, the candidate will become an Ordained Rostered worker for the LCMS. However, the SMP program was designed for “specific ministry” so that candidate would have to be called to an identical call to the one he currently has (i.e. there are only 10 LCMS congregations that are multi-site in the entire US). Also the district and synod are focused on first call individuals staying in their first call for at least 5 years. This allows for 9 years of training and ministry right here at Trinity.

The SMP model is a great one for us because it allows us the ability to gain a second pastor within our ministry. It also is an affordable option due to the finance structure and our partnership with Christ.

### **4. Is the school going to close in order to make the merger work?**

Absolutely not. In fact we hope that with our partnership, enrollment will grow in mighty ways just next year alone. We have not had a direct audience with that community and we will use it!

One of the main advantages of this partnership is growing our PreK3 and PreK 4 programs on both campuses. This will provide a stronger educational outreach for both campuses. We are hoping to build on this strength causing all three of our educational opportunities to grow.

### **5. How are the debts going to be repaid?**

The short answer is, business as usual. Both entities are paying their mortgages, insurance,

salaries, etc. and this will continue.

Christ Lutheran's Childcare is covering these costs and will continue to do so. This is the model that they have chosen and it has worked well for them.

Their financial giving as members has been wonderful, but limited due to their number of worship attendance. However, their giving is at a level that funds the SMP costs for the first two years of training. They are committed to this level of giving because they see the value of additional ministry support. Additional funding for seminary education will be available through the district and other support.

In year three and four, the SMP costs will go up at the point of ordination. However, we will also be looking at our relaunch of worship at our second site. We are trusting that our worship offerings at that new site will cover those additional costs as the ministry grows in that location.

We are also looking to make some new changes to their childcare that would allow them to generate even more income than they currently receive (summer programming, after school programs, PreK3 and PreK4 programs, etc.) This would allow them to offer raises and insurance.

The committee has been working on an asset allocation model for when the budgets become one in the future. This model will focus on the scaling of costs in proportion to increased so that this plan will be one that will benefit all.

The plan is to also pay off any member debt that is currently outstanding. We have received word that if this partnership moves forward, some members may be willing to forgive their loans.

#### **6. Will our boards be overwhelmed in this transition?**

No. Our goal at the May Voter's meeting is to expand the number of members on the three



boards necessary in this transition: Elders, Trustees and Childcare. Many of the members at Christ have expressed a desire to serve in those transition and implementation teams. They are excited for this opportunity and bring a level of wisdom to the table in regards to their current ministries.

#### **7. Pastor's workload being too much and infringing upon other needed ministries?**

While mentoring an SMP candidate will take some time, they will also be able to immediately help with ministry tasks such as bible studies, shut-in visits, and pulpit support when necessary.

#### **8. Does Christ really want this partnership?**

On March 20th Christ Lutheran Church voted on the partnership with Trinity. President Dee Goff encouraged the members to run for offices at Trinity. All committee members agreed to stay on the exploratory committee for the next 6-8 months.

Direct from their minutes: “Wayne Sievers moved that We, the voters of Christ Lutheran Church approve this partnership with Trinity and support the creation of the SMP program; agree to allow the exploratory team to design the Articles of Partnership which will include fundamental elements of our path forward, while allowing the flexibility in the future to expand our ministry opportunities.”

Discussion followed with the reminder that we need to trust God to take care of the details – God’s possibilities are limitless. This motion passed unanimously.

#### **9. Why should Trinity approve this partnership?**

Trust in the fact that your exploratory team has done their due diligence and even though they may not have all the answers, they are still asking you to make a decision based on faith. They have done some extremely hard work and would not have brought you this plan if they did

not believe that is was in the best interest of both ministries. Be encouraged by the Word of God that has led this process from Ecclesiastes 4:9-12. Also consider what you would want Christ to do if the roles were reversed.

## **APPENDIX THREE**

### **Informed Consent Document for Survey**

**Study Title: Best Practices for Church Mergers for Multi-Site Ministry**

**Researcher: Rev. Brian J Hesse**

**Email Address and Telephone Number: revhesse@sbcglobal.net 806-681-0580**

**Research Supervisor: Dr. David Peter**

**Email Address: peterd@csli.edu**

You are invited to be part of a research study. The researcher is a student at Concordia Seminary in Saint Louis, Missouri, as part of the Doctor of Ministry program (D.Min.). The information in this form is provided to help you decide if you want to participate in the research study. This form describes what you will have to do during the study and the risks and benefits of the study.

If you have any questions about or do not understand something in this form, you should ask the researcher. Do not sign this form unless the researcher has answered your questions and you decide that you want to be part of this study.

#### **WHAT IS THIS STUDY ABOUT?**

The focus of this study will be on the administrative process and practices that facilitated the recent merger of Trinity Lutheran Church and Trinity Lutheran Church Woodlands (formerly Christ Lutheran Church). Through this study it is hoped that best practices and areas for improvement can be identified for the merger process. We hope to learn and identify any areas where our new ministry partnership can be strengthened and improved.

#### **WHY AM I BEING ASKED TO BE IN THE STUDY?**

You are invited to be in the study because you are:

- An adult over the age of 18.
- You are Church member, faculty or staff member of Trinity Lutheran Church or Trinity Lutheran Church Woodlands.

If you do not meet the description above, you are not eligible to be in the study.

#### **HOW MANY PEOPLE WILL BE IN THIS STUDY?**

This survey is open to any voluntary participant meeting the criteria above. It is anticipated that at least 25 people will participate in this survey.

### **CONFLICT OF INTEREST**

The researcher is a pastor at Trinity Lutheran Church and Trinity Lutheran Church Woodlands.

### **WILL IT COST ANYTHING TO BE IN THIS STUDY?**

Participation in this study will cost you nothing.

### **HOW LONG WILL I BE IN THE STUDY?**

If you decide to be in this study, your participation is limited to completing the attached survey. Members of Trinity's implementation team will also be asked to be part of a focus group interview. No other obligation is required.

### **WHAT WILL HAPPEN DURING THIS STUDY?**

If you decide to be in this study and if you sign this form, you will do the following things:

- Give personal information about yourself, such as your age group, gender and church membership prior to the merger.
- Answer questions and complete a written survey.
- If you are a member of the focus group you will also answer questions during a focus group interview about the merger process.
- Allow the researcher to examine the data record you provide.

While you are in the study, you will be expected to:

- Follow the instructions you are given.
- Tell the researcher if you want to stop being in the study at any time.

### **WILL I BE RECORDED?**

The researcher will audiotape the focus group interview. Unless you are part of that focus group you will not be audio or video recorded in any way. For the Focus Group Interview Only: The researcher will use a digital recorder and use the recording to provide verbatim information for data interpretation.

The researcher will only use the recordings of you for the purposes you read about in this form. They will not use the recordings for any other reasons without your permission unless you sign another consent form. The recordings will be kept for seven years and they will be kept confidential. The recordings will be destroyed after seven years.

### **WILL BEING IN THIS STUDY HELP ME?**

Being in this study will not help you directly. Information from this study might help your congregation and be of assistance to other researchers helping others in the future.

## **ARE THERE RISKS TO ME IF I AM IN THIS STUDY?**

No study is completely risk-free. However, we don't anticipate that you will be harmed or distressed during this study. You may stop being in the study at any time if you become uncomfortable.

## **WILL I GET PAID?**

You will not receive anything for being in the study.

## **DO I HAVE TO BE IN THIS STUDY?**

Your participation in this study is voluntary. You can decide not to be in the study and you can change your mind about being in the study at any time. There will be no penalty to you. If you want to stop being in the study, tell the researcher.

The researcher can remove you from the study at any time. This could happen if:

- The researcher believes it is best for you to stop being in the study.
- You do not follow directions about the study.
- You no longer meet the inclusion criteria to participate.

## **WHO WILL USE AND SHARE INFORMATION ABOUT MY BEING IN THIS STUDY?**

Any information you provide in this study that could identify you such as your name, age, or other personal information will be kept confidential. Your personal information will be separated from your confidential survey with only a key code system in place to match you to your data. All data and digital recordings will be kept strictly confidential in secured, password protected digital files. Any and all paper copies of data will only be kept in a locked, secured file cabinet. In any written reports or publications, no one will be able to identify you. Only the researcher and the research supervisor will be able to review this information. Even if you leave this study early, the researcher may still be able to use your data and it will be kept confidential.

## **Limits of Privacy (Confidentiality)**

Generally speaking, the researcher can assure you that she/he will keep everything you tell him/her or do for the study private. Yet there are times where the researcher cannot keep things private (confidential). The researcher cannot keep things private (confidential) when:

- The researcher finds out that a child or vulnerable adult has been abused
- The researcher finds out that that a person plans to hurt him or herself, such as commit suicide,
- The researcher finds out that a person plans to hurt someone else,

There are laws that require many professionals to take action if they think a person might harm themselves or another, or if a child or adult is being abused. In addition, there are guidelines that researchers must follow to make sure all people are treated with respect and kept safe. In most states, there is a government agency that must be told if someone is being abused or plans to hurt themselves or another person. Please ask any questions you may have about this issue before agreeing to be in the study. It is important that you do not feel betrayed if it turns out that the researcher cannot keep some things private.

**WHO CAN I TALK TO ABOUT THIS STUDY?**

You can ask questions about the study at any time. You can call the researcher if you have any concerns or complaints. You should call the researcher at the phone number listed on page 1 of this form if you have questions about anything related to this study.

**DO YOU WANT TO BE IN THIS STUDY?**

I have read this form, and I have been able to ask questions about this study. The researcher has talked with me about this study. The researcher has answered all my questions. I voluntarily agree to be in this study. I agree to allow the use and sharing of my study-related records as described above.

By signing this form, I have not given up any of my legal rights as a research participant. I will get a signed copy of this consent form for my records.

\_\_\_\_\_  
Printed Name of Participant

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

I attest that the participant named above had enough time to consider this information, had an opportunity to ask questions, and voluntarily agreed to be in this study.

\_\_\_\_\_  
Printed Name of Researcher

\_\_\_\_\_  
Signature of Researcher

\_\_\_\_\_  
Date

**DO YOU WISH TO BE AUDIOTAPED IN THIS STUDY?**

I voluntarily agree to let the researcher audiotape me for this study. I agree to allow the use of my recordings as described in this form.

\_\_\_\_\_  
Printed Name of Participant

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

## APPENDIX FOUR

### Congregational Survey with Cover Letter

Tuesday, November 14, 2017

Dear Trinity Member,

It was May 15, 2016, when a historic event occurred in our ministry. The partnership between Trinity Lutheran and Trinity Lutheran Woodlands is about to begin its launch phase. We are looking forward to the incredible blessings and opportunities that our Lord has in store for us.

As many of you know, I have been working on an advanced degree. As part of this continuing education I have been writing a final project on the best practices of our merger. Prior to our launch is an ideal time to receive some feedback from you the members of the congregation. This research study will be an important step in completing my final project. Your participation in the enclosed survey will also provide helpful reflection for our launch team in the next phase of our partnership.

Enclosed you will find two items:

1. **The Best Practices in Congregational Mergers Congregational Survey:** This survey is for you to complete and return to my office.
2. **Informed Consent Form:** This form is required for all research surveys to be accepted. Enclosed are two copies of this Informed Consent. One copy is for you to sign and return. The other copy is for you to keep with your records.

This is a confidential survey. Once your survey is received with the Informed Consent, the form bearing your signature will be stored separately from your survey.

In order to keep the process of our launch moving forward **please have all surveys returned to Pastor Hesse's Office no later than Sunday, December 31, 2017.** If you should have any questions please contact Pastor Hesse.

Your servant in Christ,

Rev. Brian J. Hesse, Senior Pastor  
Josh 1:9

## Best Practices in Congregational Mergers Congregational Survey

### Section One: Demographics

#### Pre-Merger Membership:

Christ Lutheran Church       Trinity Lutheran Church       Other

**Gender:**     Male       Female

**Age Group:**     18-24       25-34       35-44       45-54       55-64  
 65-74       75+

#### Worship Attendance per month: (check one)

3-4 times     2-3 times     1-2times     less than once per month

#### Ministry Involvement: (check one)

Active Church Member       Inactive Church Member       Faculty/Staff Member

### Section Two: Survey Questions Concerning the Merger.

**1. The name of "Trinity Lutheran Church Woodlands" was the best choice in naming our new multi-site ministry.**

Strongly Disagree     Disagree       Undecided       Agree       Strongly Agree

**2. I felt fully informed on the progress of our merger and its impact on my participation in the ministry throughout the process.**

Strongly Disagree     Disagree       Undecided       Agree       Strongly Agree

**3. The merger of our two congregations has been beneficial to both congegations.**

Strongly Disagree     Disagree       Undecided       Agree       Strongly Agree

**4. The current governance structure is sufficient to support and enable our multi-site ministry, no governance changes are needed.**

Strongly Disagree     Disagree       Undecided       Agree       Strongly Agree

**5. Throughout the merger process, I continued to pray for this process.**

Strongly Disagree     Disagree       Undecided       Agree       Strongly Agree



6. If given the opportunity I would support a future merger opportunity for expanding our ministry.

Strongly Disagree       Disagree       Undecided       Agree       Strongly Agree

**Section Three: Comments**

Please leave any necessary comments in the space below.

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Office Use Only:

Survey # \_\_\_\_\_

Date Received: \_\_\_\_\_

## APPENDIX FIVE

### Compilation of Survey Respondent's Raw Data

#### Raw Survey Data by Respondent

Respondent Survey #	Survey Items					
	1	2	3	4	5	6
001	5	4	4	2	5	4
002	3	4	4	4	4	4
003	4	4	5	4	4	4
004	5	5	5	3	5	5
005	3	4	4	3	5	4
006	4	4	5	4	4	3
007	4	4	4	2	4	4
008	5	5	4	4	4	4
009	3	4	4	4	4	4
010	5	5	4	3	3	3
011	4	5	4	2	5	4
012	4	4	5	4	5	5
013	4	2	4	4	5	2
014	4	3	4	5	5	3
015	4	3	3	3	5	1
016	3	4	4	4	5	3
017	3	5	5	4	5	5
018	4		4	3	5	3
019	4	3	3	4	4	4
020	5	5	5	5	5	5
021	4	4	4	4	5	4
022	4	4	4	4	5	4
023	3	4	4	2	4	4

024	5	4	5	4	5	4
025	4	3	5	4	4	3
026	4	4	4	4	4	4
027	4	4	4	4	4	3
028	4	4	4	3	4	4
029	4	2	3	2	4	2
030	5	5	5	5	4	5
031	3	3	2	4	5	2
032	5	4	5	5	5	5
033	2	4	3	3	5	4
034	4	4	4	4	4	4
035	3	4	5	4	4	4
036	3	4	3	2	4	3
037	4	4	2	1	4	2
038	5	5	5	3	4	3
039	3	3	3	3	3	4
040	2	4	4	2	4	4
041	2	2	4	4	4	4
042	5	1	4	2	4	3
043	3	4	4	2	5	2
044	5	5	5	4	5	3
045	5	1	3	2	4	1
046		2	3	2	4	2
047	2	2	4	3	4	3
048	4	4	4	4	4	4

## APPENDIX SIX

### Compilation of Survey Respondent Comments

Respondent #	Comments
003	I've enjoyed getting to meet many of the Christ members. Combining the two has strengthened Trinity. Appreciate all the hard work it took to accomplish this merger.
011	My own personal perspective is it is "all" the Lord's Church. He will guide, position and mold it, to enable His people to continue to provide Word and Sacrament ministry and bring the Good News (Gospel) to the world we live in.
014	Concerned now that our attendance is not at the levels that we had years before the merger. Have many quit coming because of the merger? Our evangelism (or lack of a better word) may have stopped with our present members. If this continues both of the previous congregations may fail. We can't lose \$20,000 a month and stay present in the community!
015	We cannot afford more debt! We are having to take money out of our savings for payroll, insurance, etc. for both campuses! It remains to be seen how beneficial the merger is to Trinity main campus.
016	I wish there had been more specific details about how the merger would affect Christ members. I also would like to see more specific details about restarting worship services with Vicar Black.
018	Item #6: "Undecided" #6 seems to suggest "any merger" opportunity - there could be numerous reasons not to pursue certain mergers, thus my undecided mark.
019	It's always sad to see a church break apart for any reason. Hope to someday see them have services at Woodlands again.
027	It appears that everything is running smoothly.
037	I remain concerned about the long-term success of the "Woodlands" campus and have some fear of a detrimental impact of the total ministry. Regardless, I continue to pray that our ministry will find God's path and grow towards a strong and vibrant ministry in our community.

038	I am undecided about governance and future mergers because others are more responsible for these things and have better insight than my opinion.
042	Item #2: Future mergers will have greater participation and success when all involved are given the chance to understand the process, from the very beginning. In this process, only a small group knew the idea, initially, and too much time was allowed to lapse before others were brought in. This caused rumors, even wild rumors that had no basis in fact but had no correct information to counter them. Once the word was put out, it was poorly done with bad visuals and meetings that did not allow sufficient time to discuss. Very few know how to close the merger was to crashing upon takeoff. All that said once the poor start was overcome, it became a positive experience with excitement for future ministry. There are those, however, we still need to win over and get on board.
044	Item #4: Governance is good, but there are TLC "main church" habits and forms in the office that still need adoption to the two facilities in order to achieve inclusiveness.
045	<p>Item #2: Not nearly enough.</p> <p>Item #3: Good for them not specifically for us.</p> <p>Item #5: a lot!</p> <p>Item #6: I don't think we should expand any further until we work out all of the issues with this current merger.</p> <p>Comments: I know that the people of Christ needed our help. I did not like the way the merger info was presented. It was too fast and I do not like how some members of Trinity had to carry the big burden of the merger after they did not vote yes for it.</p>

## **APPENDIX SEVEN**

### **Compilation of Survey Statistical Data**

Chart 1: Survey Statistical Results for All Respondents

Chart 2: Survey Statistical Results for Pre-Merger Christ Lutheran Church

Chart 3: Survey Statistical Results for Pre-Merger Trinity Lutheran Church

Table 12: Statistical Results for All Respondents

<b>Statistical Results for All Respondents</b>											
<b>Total Surveys Received</b>										<b>48</b>	
<b>Total Respondents by Pre-Merger Membership</b>											
Christ Lutheran	17	35.4%	Trinity Lutheran	30	62.5%	Other		1	2.1%		
<b>Respondents by Age Group</b>											
Age: 18-24	1	2.1%	Age: 35-34	3	6.3%	Age: 35-44	1	2.1%	Age: 45-54	5	10.4%
Age: 55-64	9	18.8%	Age: 65-74	18	37.5%	Age: 75+	10	20.8%	N/A	3	6.3%
<b>Respondents by Gender</b>											
Male			19	39.6%		Female			29	60.4%	
<b>Ministry Involvement</b>											
Active Member	43	89.6%	In Active Member	3	6.3%	Faculty or Staff		2	4.2%		
<b>Worship Attendance (times per month)</b>											
<b>&lt;1</b>		<b>1-2</b>			<b>2-3</b>			<b>3-4</b>			
2	4.2%	3	6.3%		5	10.4%		38	79.2%		
<b>Average Response Agreement Score by Survey Item</b>											
<b>#1</b>		<b>#2</b>		<b>#3</b>		<b>#4</b>		<b>#5</b>		<b>#6</b>	
3.851		3.723		4.021		3.354		4.375		3.500	
<b>Total Survey Item Response Count &amp; Percentage</b>											
Item #	Strongly Disagree		Disagree		Undecided		Agree		Strongly Agree		Total
1	0	0.00%	4	8.33%	11	22.92%	20	41.67%	12	25.00%	47
2	2	4.17%	5	10.42%	6	12.50%	25	52.08%	9	18.75%	47
3	0	0.00%	2	4.17%	8	16.67%	25	52.08%	13	27.08%	48
4	1	2.08%	11	22.92%	10	20.83%	22	45.83%	4	8.33%	48
5	0	0.00%	0	0.00%	2	4.17%	26	54.17%	20	41.67%	48
6	2	4.17%	6	12.50%	12	25.00%	22	45.83%	6	12.50%	48

Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

Table 13: Statistical Results for Pre-Merger Christ Lutheran Church

<b>Statistical Results for Pre-Merger Christ Lutheran Church</b>											
<b>Total Surveys Received</b>										<b>17</b>	
<b>Total Respondents by Pre-Merger Membership</b>											
Christ Lutheran	17	100%	Trinity Lutheran	0	0.00%	Other		0	0.00%		
<b>Respondents by Age Group</b>											
Age: 18-24	0	0.00%	Age: 35-34	0	0.00%	Age: 35-44	0	0.00%	Age: 45-54	0	0.00%
Age: 55-64	2	11.8%	Age: 65-74	8	47.1%	Age: 75+	6	35.3%	N/A	1	5.9%
<b>Respondents by Gender</b>											
Male		6	35.3%	Female		11	64.7%				
<b>Ministry Involvement</b>											
Active Member	17	100%	In Active Member	0	0.00%	Faculty or Staff		0	0.00%		
<b>Worship Attendance (times per month)</b>											
<1		1-2		2-3		3-4					
0	0.00%	1	5.9%	4	23.5%	12	70.6%				
<b>Average Response Agreement Score by Survey Item</b>											
#1		#2		#3		#4		#5		#6	
3.882		4.125		4.235		3.294		4.588		3.647	
<b>Total Survey Item Response Count &amp; Percentage</b>											
Item #	Strongly Disagree		Disagree		Undecided		Agree		Strongly Agree		Total
1	0	0.00%	1	5.88%	4	23.53%	8	47.06%	4	23.53%	17
2	0	0.00%	0	0.00%	2	11.76%	10	58.82%	4	23.53%	16
3	0	0.00%	0	0.00%	2	11.76%	9	52.94%	3	35.29%	17
4	0	0.00%	3	17.65%	6	35.29%	8	47.06%	0	0.00%	17
5	0	0.00%	0	0.00%	0	0.00%	7	41.18%	10	58.82%	17
6	1	5.88%	1	5.88%	3	17.65%	10	58.82%	2	11.76%	17

Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.

Table 14: Statistical Results for Pre-Merger Trinity Lutheran Church

<b>Statistical Results for Pre-Merger Trinity Lutheran Church</b>											
<b>Total Surveys Received</b>									<b>30</b>		
<b>Total Respondents by Pre-Merger Membership</b>											
Christ Lutheran	0	0.00%	Trinity Lutheran	30	100%	Other	0	0.00%			
<b>Respondents by Age Group</b>											
Age: 18-24	1	3.30%	Age: 35-34	3	10.0%	Age: 35-44	1	3.30%	Age: 45-54	4	13.3%
Age: 55-64	7	23.3%	Age: 65-74	10	33.3%	Age: 75+	4	13.3%	N/A	0	0.0%
<b>Respondents by Gender</b>											
Male			13		43.3%		Female			17 56.7%	
<b>Ministry Involvement</b>											
Active Member	26	86.7%	In Active Member	3	10.0%	Faculty or Staff	1	3.3%			
<b>Worship Attendance (times per month)</b>											
<b>&lt;1</b>		<b>1-2</b>			<b>2-3</b>			<b>3-4</b>			
1	3.3%	2	6.7%	1	3.3%	26	86.7%				
<b>Average Response Agreement Score by Survey Item</b>											
<b>#1</b>		<b>#2</b>		<b>#3</b>		<b>#4</b>		<b>#5</b>		<b>#6</b>	
3.828		3.533		3.933		3.367		4.267		3.400	
<b>Total Survey Item Response Count &amp; Percentage</b>											
<b>Item #</b>	<b>Strongly Disagree</b>		<b>Disagree</b>		<b>Undecided</b>		<b>Agree</b>		<b>Strongly Agree</b>		<b>Total</b>
1	0	0.00%	3	10.0%	7	23.33%	11	36.67%	8	26.67%	29
2	2	6.67%	5	16.67%	3	10.0%	15	50.00%	5	16.67%	30
3	0	0.00%	2	6.67%	5	16.67%	16	53.33%	7	23.33%	30
4	1	3.33%	8	26.67%	4	13.33%	13	43.33%	4	13.33%	30
5	0	0.00%	0	0.00%	2	6.67%	18	60.00%	10	33.33%	30
6	1	3.33%	5	16.67%	9	30.00%	11	36.67%	4	13.33%	30

Source: Best Practices in Congregational Mergers Congregational Survey, November 2017.



## APPENDIX EIGHT

### Compilation of Focus Groups Comments

**Focus Group Question One:** What do you believe are some of the things our congregations did well in the merger process so far?

Comment #1	The opportunities abound and are exciting.
Comment #2	Once everyone got on board it (the process) worked well.
Comment #3	The more we communicate, the better it goes with the congregation.
Comment #4	Slowing down with the assistance of outside legal help was important.

**Focus Group Question Two:** What do you believe are some things our congregations did not do well in the merger process so far?

Comment #1	We stumbled badly coming out of the blocks. The core group wasn't told.
Comment #1b	There was a core group that was told and started the process, but maybe it wasn't the right core group.
Comment #1c	We needed lots of openness and certain people didn't feel we had it.
Comment #2	How many people understand the scope of the ministry? There is more to our ministry than most know.
Comment #3	Wish we had started sooner.
Comment #4	Redundant work is being done between the Board and the Implementation Team.

## **APPENDIX NINE**

### **Recommendations for Best Practices in LCMS Congregational Mergers into Multisite Ministries**

**Best Practice Recommendation 1:** Saturate with Prayer.

**Best Practice Recommendation 2:** Attempt to over-communicate.

**Best Practice Recommendation 3:** Focus on Mission not Uncertainty.

**Best Practice Recommendation 4:** Be Flexible.

**Best Practice Recommendation 5:** Get Legal Assistance.

**Best Practice Recommendation 6:** Choose a Governance and Use It.

**Best Practice Recommendation 7:** Names Are Important.

**Best Practice Recommendation 8:** Be Honest About Challenges and Opportunities.

**Best Practice Recommendation 9:** Go!

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