

UNITING CHURCH IN AUSTRALIA



Mission Pathways

Partnering
or
Merging Congregations

These Mission Pathways aim to provide a simple strategy, based on Christian values, to help Congregations merge successfully to enhance the Gospel and the wider church.

Mission Pathways

Outline

The Mission Pathways describes:

1. An Introduction to mission and the Great Commission
2. Mission options
3. Planning for Mission
4. Planning for a Congregational merger/s
5. Finding a merger partner
6. Successfully maintaining the merger.

Creation Date	June 2018
Last Revised	N/A – First Issue
Version Control	V0.1 Peta Lilburne and Ian Goff V0.2 Edits by Sydney Central Coast Presbytery and Sydney Presbytery V0.3 Endorsed by each Presbytery

Table of Contents

How to use this Pathway	4
Introduction to Mission Pathways	5
STEP ONE - INTRODUCTION TO MISSION.....	10
STEP TWO - MISSION OPTIONS	11
STEP THREE – PLANNING	13
STEP FOUR – MISSION PLANNING.....	16
STEP FIVE – LOOKING FOR A MISSION PARTNER	19
STEP SIX - FINDING A PARTNER.....	20
STEP SEVEN – WALKING TOGETHER & FINE TUNING.....	24
STEP EIGHT – MAKING A GOOD THING BETTER.....	26
APPENDICES	28
A Merging Success Story	29
Change Management.....	30
Reasons for change	30
Project Management.....	31
Strategic Management – Planning for the Future	36
The RSL Concept.....	39

How to use this Pathway

This Mission Pathways (the Pathway) aims to provide a simple strategy, based on Christian values, to help Congregations partner or merge successfully to enhance the Gospel and the wider church.

This document is all about making disciples for God by improving mission based on the love of Jesus. What an amazing task we have been entrusted with.

The Pathways has not been written by experts; but rather two people with a passion and desire to see strength in our Congregations and to provide a resource to obtain or improve on that strength.

Therefore, this is not a “rule book” but rather a series of discussion and consideration points to help anyone commence, plan, then enact a Church merger or partnership.

With that in mind, several useful pieces of information have been moved to the Appendix. They provide a very useful guide and are intended to be read in conjunction with the main text but are not intended to interfere with the **Summary Steps** of the Pathway.

The **Summary Steps** are in the main body of the document and complement the Appendix. The **Summary Steps** are designed to systematically guide conversations and actions until the party(s) are confident that all guidance from the Steps has been considered and or completed; and progression to the next Step can then proceed.

Along with the Pathway, Congregations are recommended to undertake a prayer-filled, spiritual approach; engaging the whole Congregation on a collegial, interactive, life giving journey.

Peta Lilburn
Ian Goff

Introduction to Mission Pathways

This Mission Pathways document (the Pathway) aims to help churches and its members find a spiritually up-lifting way to spread the Gospel and grow the Congregation.

Background

At Synod 2016 the theme *Come Holy Spirit – Renew our Hearts* was established. At this gathering a concept called “Open Space Technology” was used to explore issues on the hearts and minds of those in attendance.

Many concepts and ideas were formed, and then smaller teams gathered to develop these further based upon personal interest, needs, experience or a combination of all three. Teams identified current Congregational issues, opportunities for improvement and concerns about best practice. One objective was to commence a process for discussion around improving mission by merging Congregations or forming a process for partnering in mission activities.

This ultimately led to a task group forming to prepare this document.

History

We, the Uniting Church in Australia, (UCA), have a proud history of mission and outreach: one that stems back hundreds of years.

Some forty years ago, a successful merger took place between Australia’s Congregational, Methodist and Presbyterian churches, and the UCA was created.

The new UCA, with its expanded membership, new skills, finances and energy and commitments, opened new avenues for missionary work, pastoral care and stewardship. The new UCA initiatives became a lifeline for many people, rich and poor, young and old and in-between.

The UCA tradition is based on the teachings of Jesus and is steeped in helping others, by a great sharing of gifts, finances and other resources.

Just as importantly, the merger resulted in new commitments and new energies to extend mission and spread the Gospel. The Spirit’s presence was palpable for many and expanded throughout Australia.

Once again, times have changed in Australia. The sense of stability and caring seems to be changing and is unsettling old traditions. We, in the UCA, are listening to the Spirit’s guidance to invigorate our mission, our commitment to sharing our gifts with others and to spreading the Gospel.

This Pathway aims to help spread this invigoration and commitment.

Mission Pathways

A new spirit

Everywhere people, young and older, are seeking a new pathway for a new life; seeking something that will provide a sense of purpose and meaning, love and being loved in a world that often seems pointless and callus.

This new searching for meaning is especially strong within those under 30 who often are seeking new experiences and a purpose to their lives. This generation can often have difficulty with our Christian rituals and language; so now is the time to seek the Spirit's presence, to seek new ways of spreading the joy and comfort of the Gospel.

Change of focus: New community - New joint mission

Today there are many opportunities for creative mission within our Congregations.

We see some of it in new initiatives, like public art work depicting the stations of the cross, sharing spirituality across denominations, or a new understanding of meditation. Some of these ideas are old but are being reinvigorated by new relationships.

Now Churches can offer more services than ever before. They provide play groups and early childhood facilities, English courses, marriage counselling, quilts and toys to children overseas. Churches are involved in supporting those in gaol, or anxiously waiting at court appearances.

However most of what churches do is not in the public arena, and many good initiatives get lost for a lack of help in a small Congregation and a critical mass.

This is not necessarily a problem as there are ways for Congregations to get together, either formally or not, which can result in new energies and commitments to make a difference in the world. This Pathway explores these exact ideas and suggests ways to enact conversations.

How are we doing? Where are we going?

Is the UCA providing people, young or old, with a new spirituality?

Can we be committed to something beyond our usual outreach programs?

Can we start to use a language in church that doesn't alienate people without a "church background"?

Can we help those baptising their babies understand what is being said and promised within the required liturgy – and then actually live out that commitment?

The answer to these questions is: **Definitely** – we can do all that AND MORE.

Yet it remains to be seen whether change will happen because right now very few Congregations hold serious conversations about future growth strategies or consider the future beyond their current membership base. However collectively we have the skills, the churches, the finances and the leaders and most of all: we have the love of God motivating us by the words of scripture and the prayer Jesus taught us to pray:

Thy Kingdom come;
Thy will be done
on earth as it is in heaven

Mission Pathways

Partnering/Merging Congregations

There are many potential triggers for change within a Congregation. It could be something concrete, like dwindling numbers. For others it may be something less tangible, like a lack of enthusiasm, or a focus on maintenance rather than mission. It could also be a growing commitment to share spiritual gifts, especially God's love, to the wider community.

Change can produce anxiety unless managed in a caring, supportive manner.

Change can also bring a new sense of purpose to the Congregation and create a new hope of a richer and fulfilling life.

Successful change starts by calling on the Spirit to energise and inspire whole Congregations, no matter the size, location or age. The commitment, inspiration, care and oversight of the Ministers, Elders or the many UCA councils is essential in carrying on the Spirit's call to new mission and change.

Successful change also includes:

- talking, reading and investigating new ideas;
- seeking help and information from Presbytery, Synod and other churches;
- creating a Congregational body, e.g. a steering committee, to keep enthusiasm high and the business processes running;
- caring and supporting the Congregation through change by:
 - building consensus and team decision making
 - prayerfully committing to making things work;
- working with prayer and mission partners; and
- joining together to spread the love of Christ throughout the neighbourhood and beyond.

Our Congregations have these skills, especially when partnered with other like-minded Christians. They just need a catalyst for change in order to create a NEW UCA!

This is a great time to be looking at making a difference and this Pathway is designed to provide guidance and tools for it to be enacted.

Mission Pathways

Why use the Mission Pathways?

This Pathway is based on research, experiences and the success of other Congregations.

It strongly recommends that any discussion about mission involves the whole Congregation.

The Pathways is systematic and steadily takes a Congregation through a series of steps outlining new insights and opportunities.

The questions, hopefully, will enable Congregations to take a leap of faith into new mission opportunities. In particular, it is hoped that Congregational mergers will occur, as they typically create new enthusiasms for mission and outreach.

The Pathways addresses:

- a Congregation's current mission standing;
- new mission options, e.g.:
 - the 'steady as she goes' option;
 - the 'work harder' option;
 - the new minister/ location/ music/ new-look option;
 - church closure option;
 - partnering with another congregation for mission;
 - the merger option;
- key parties and their role in change management, e.g. Presbytery and Synod;
- ways to manage change in a Congregation;
- deciding the most suitable mission option for a Congregation;
- selecting and merging with another Congregation;
- implementing the merger;
- identifying ways to work together successfully before and after partnering or a merger, through prayer, sensitivity and keeping 'the eyes on the prize'!

PART ONE

MISSION

STEP ONE - INTRODUCTION TO MISSION

Bible Verse:

Fear not, for I am with you, be not dismayed, for I am your God; I will strengthen you, I will help you, I will uphold you with my righteous right hand. Isaiah 41.10

Introduction:

STEP ONE looks firstly at Jesus' endorsement of mission, and then at why mission is important.

1. The Great Commission - Matthew 28:16-20

The Great Commission, provided to us by Jesus, is as relevant today as it was 2,000 years ago. Perhaps it is even more relevant as people in general feel pressed by secular ideas, loss of endorsement of Christian beliefs and values and a dwindling sense of community.

However, these words are always encouraging:

¹⁶ Then the eleven disciples went to Galilee, to the mountain where Jesus had told them to go. When they saw him, they worshiped him; but some doubted. Then Jesus came to them and said, "All authority in heaven and on earth has been given to me. Therefore, go and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything I have commanded you. And surely I am with you always, to the very end of the age."

2. Why do mission?

A whole new Pathway could be written about this topic, yet, in summary, we are exhorted to mission by Jesus' beautiful Great Commission. Below are some additional inducements:

- our Uniting Church in Australia is committed to Mission and Outreach as per the Basis of Union;
- a sense of being uplifted when following Jesus' command;
- seeing growth of our Christian communities; and
- providing the love of God and the gifts and teachings of Jesus.

STEP TWO - MISSION OPTIONS

Bible Verse:

And your ears shall hear a word behind you saying: This is the way, walk in it. Isaiah 30:21

Introduction:

STEP TWO focuses on mission options and essentials. It also looks at the benefits and issues of change including changing mission directions.

1. Mission essentials

The following list identifies some actions that can help improve interest in mission:

- focussing on prayer and commitment;
- thinking about the Great Commission;
- working first with strengths, then, secondly, trying to moderate weakness;
- seeking opportunities and new avenues for change; and
- seeking partners in mission.

2. Options

Most Congregations plan to undertake mission, but at times have difficulties in following through with the good intentions. This situation is not a failure, but an opportunity to try something else, something new and creative.

Taking these steps and even something simpler can reinvigorate and inspire the Congregation to new action. They now can refocus on:

- up-skilling for mission;
- managing potential pitfalls and upsets;
- joining another Congregation's mission ventures;
- discussing options with Presbytery;
- being guided by a mission specialist;
- merging with another Congregation; and
- rejoicing in small successes.

Below is a list of actions that are more likely to **reduce** enthusiasm than encourage it. These actions generally make a Congregation feel less, not more, empowered for mission and should be avoided. They include:

- continuing to work on the same mission program without success; and
- putting in place new, large or unfamiliar mission initiatives without support. (Financial and human resources)

3. Pros and cons of a new mission initiative

New mission initiatives can bring a combination of empowerment, enthusiasm, anxiety or a feeling of being overwhelmed. It is at this point that good pastoral care is essential.

Care and understanding of those who are uncertain or upset by change is important in the management of this process.

Other pieces of advice are:

- make haste slowly;
- create a mission prayer chain; and
- encourage the Congregation to be involved with new, unthreatening mission, e.g. visiting hospitals, making Christmas gifts, existing structured outreach programs.

For others, new initiatives open exciting horizons and raise commitment and enthusiasm for mission. The change many demand new skills and some people are invigorated by the change.

The way change is identified and managed is very important. It can empower others to walk along new paths for the sake of the Gospel or alternatively lead them down a path of disengagement, if the sense of loss feels greater than the benefits of a new mission.

NOTE:

Presbytery has a wealth of skills, expertise and background knowledge that could be most beneficial for any congregation planning new mission initiatives.

Talking to your Presbytery member/s early about your mission initiative would be beneficial, as we will outline later how the Presbytery's role (as per the Regulations) is key to any change in structure being enacted.

STEP THREE – PLANNING

Bible Verse:

For I know the plans I have for you, declared the Lord, plans for welfare and not for evil, to give you a future and hope. Jeremiah 29:11

Introduction:

STEP THREE aims to encourage the Congregation to take a serious look at:

- the current state of the church (an inventory);
- the current mission situation (an inventory of spiritual commitment and an analysis of where the Congregation is going);
- the mission and values statements; and
- any future planning documents.

This Step aims to help the Congregation define its current and future state.

1. Stocktaking – an inventory

This section aims to make a list of the current situation of the church with factors such as social, environmental, economic and spirituality considered.

- social aspects, (e.g. the local community, the Congregation's age and involvements),
- physical/environmental aspects, (e.g. size of the hall and church, access, surrounding social services);
- economic aspects, (e.g. financial health, financial knowledge, historic profit and loss levels and assets values); and
- spiritual and mission outreach programs, and the neighbouring UCA/Non UCA Congregations.

2. Where are we going? – an analysis of the inventory

After looking closely at the items specified in the inventory, an assessment of Church health and vitality can be undertaken, based on Christian values and mission objectives.

The analysis can also help identify more specific things such as:

- success stories which should be shared and documented;
- opportunities for change; and
- potential threats to future ideas success.

Having considered the items above, now challenge yourself with the harder conversations such as:

- What is going really well that the Congregation may wish to maintain? (i.e. church strengths);
- What is not working well and needs resources diverted from it? (church weaknesses);
- What can impact our Congregation, e.g. rezoning to business uses? (threats);

Mission Pathways

- Are there new people or groups to engage with and create connections (opportunities)?
 - e.g. a new local high school opens; or
 - there is large growth in non-English speaking background families in your community.

This assessment is commonly referred to as a SWOT analysis, being an assessment of STRENGTHS, OPPORTUNITIES, WEAKNESS AND THREATS. (See Appendix)

3. Where do we want to go? – values, mission and vision, performance goals

This section addresses less tangible but equally important things, like:

- What are the Congregation's values and principles?
- What is the mission and vision for the church?
- What are the critical outcomes for new initiatives?
- What should be retained from the existing mission plan?

Establishing core values and principles is essential to direct all decision-making process. It is the rudder to the ship to guide and direct activity along the right path.

Answering these questions will help in deciding which mission initiatives, including partnering, are worthwhile, and whether they meet Christian values or not.

4. How will we get there?

This section aims to encourage the Congregation to look at future mission options and rank them in terms of suitability. It is a broad-brush approach starting with:

- brainstorming to create numerous options;
- testing the options against our values and mission priorities;
- testing projects against the Congregation's skills, finances, commitment levels;
- testing projects against a community need;
- assessing a project's likelihood to encourage and engage the Congregation.

Having done the above, rank each project for a final assessment.

The resulting list of potential mission projects can then be investigated more formally and placed into the Mission Plan.

5. Roles and definitions

The mission planning processes includes a number of skills and expertise which may not be available to some Congregations. Below is a list of some useful organisations and their roles, that could be useful when thinking about the planning for mission:

- Presbytery – in relation to property, finances, potential merger partners, prayer and other support;
- Synod – in relation to potential merger partners, finance and legal matters;
- Realtors – in relation to property values, resale options and refurbishing;
- Local council – in relation to land use and zoning;
- Social services – in relation to the needs of the local community;
- Financial management – in relation to current and future finances and needs; and
- Strategic planning – in relation to forward planning based on existing conditions and key values.

STEP FOUR – MISSION PLANNING

Bible Verse:

Commit your work to the Lord, and your plans will be established. Proverbs 16:3

Introduction:

STEP FOUR takes the previous investigations and refines them to create a Mission Plan.

If the Congregation feels it is appropriate, the mission planning may also include options and benefits for a merger with another Congregation(s).

1. Planning for Mission – general information

Mission plans generally work best if they:

- align with the Congregation's skills and interests;
- align with a community need;
- include details of what, why, who, when;
- define reporting periods;
- identify outcomes that are agreed to and achievable;
- are supported by the Congregation and have a key supporter or champion for each project;
- include some short-term projects to obtain "quick wins", and others more medium and long term in delivery; and
- are supported by funding and the necessary human resources to enact.

Starting with a small, short program (say a six-month project) is useful as it:

- needs a shorter commitment from the Congregation;
- may require fewer helpers and/or funds;
- can exhibit a 'çan-do' attitude.

Larger, more ambitious projects are often more appealing but generally require a significant amount of investment in time, money and resources.

However, this should not prevent aiming high and planning properly for a sizeable project.

Mission Pathways

2. A New Plan for Mission

When writing of a Mission Plan, the following items should be included in order to put the Plan in context:

- a cover sheet with Church name, location, date etc;
- summaries of:
 - previous decisions and commitments;
 - mission, vision, values and objectives; and
 - community needs and opportunities,
- the Congregation's commitment to a new mission venture; and
- a listing of all mission initiatives and details, using a table like that shown below.

Below is a table of items that should be addressed in the Mission Plan:

Insert timeframe 20XX-20YY

Project Name	Why Do it?	What is involved?	Who are our team?	When to start / finish?	Forecasted Cost	Importance Rating	Comments

3. How do we implement the Plan?

If a Mission Plan supports Congregational interests, commitments and strengths, it is likely to produce successful mission projects. In turn, success will encourage the Congregation to continue with mission and expand their horizons.

Implementing a planned project typically works well by:

- setting up a small committed team to oversee the project, including managing resources and reporting to the Congregation;
- assigning each team member with an area of responsibility;
- recording key decisions and outcomes;
- reporting back to the Congregation regularly; and
- seeking external assistance if there are resourcing gaps, be it ideas, funding or people.

Note: See Project Management (page 31) for additional more detailed information on Mission Planning.

PART TWO

**PARTNERING
AND
MERGING CONGREGATIONS**

STEP FIVE – LOOKING FOR A MISSION PARTNER

Bible Verse:

Ask and it will be given to you; seek and you will find; knock and the door will be opened to you. Matthew 7:7

Introduction:

STEP FIVE looks at options to reinvigorate the Congregation, especially in relation to mission.

1. Seeking a new mission partner

If, after implementing the Mission Plan alone and the results are not satisfactory, the Congregation may wish to consider finding a mission partner to aid them in accomplishing the plan. A mission partner can increase:

- Congregation numbers and cover new areas for mission
- energy and enthusiasm for mission.
- new ideas and method for implementation; and
- funding

Below are some suggestions for the Congregation's discussion and contemplation before involving a new mission partner. They include:

- reflecting on your mission plan, vision and goals;
- focussing on existing strengths, enthusiasm and opportunities for mission;
- identifying the preferred character and commitments of a new partner,
- reflecting on 'show stoppers' or 'undesirables' regarding a potential partner;
- revisiting the Mission Plan to make it more suitable to these new situations; and;
- discussing options with your Presbytery, Synod.

Thinking outside the existing 'square' provides opportunities for new ideas, new friends, and new mission activities.

Ultimately if the Congregation decides to search for a new mission partner, it will be time well spent, establishing the Congregations profile and documenting the outputs from earlier Steps in this Pathway.

2. Adjusting a Mission Statement

Producing a written document that describes the Congregation's reason for seeking a mission change or new partner, is useful. It will help both the Congregation and a potential mission partner understand what is important to the Congregation.

Identify why and what the Congregation is looking for in a mission partner, and any changed situations from the initial discernment.

STEP SIX - FINDING A PARTNER

Bible Verse:

Two are better than one, because they have a good reward for their toil. Ecclesiastes 4:9

Introduction:

STEP SIX addresses opportunities, issues and the potential commitments for a permanent Congregation merger.

Information in this section could also be useful for Congregations who wish to share mission and outreach programs only, without forming a permanent relationship or merger.

1. Types of Partnering including merging

There are many names and classifications for partnerships and mergers¹. Some are listed below, along with some of the associated benefits:

- **Partnering** – generally within the denomination (but not essential):
 - a short-term relationship, typically provides flexibility;
 - a long-term relationship, typically provides a more formal commitment to a specified mission initiative;

- **Merging** – generally within the denomination, (but not essential):
 - a Rebirth: a struggling church gets a new lease on life, thanks to merging with another church;
 - an Adoption merger: a stable, but small, church is integrated into a larger church to create a more robust mission program;
 - a Marriage merger: two strong churches merge to create a new united vision and a new leadership configuration; or
 - an ICU (Intensive Care Unit) merger: two churches, generally motivated by anxiety, work together for new mission.

There are also options for less formal partnering between Congregations to strengthen and improve mission opportunities. For example:

- sharing mission plans and projects: e.g. two Congregations sharing the playgroup, or joining together to expand an outreach program;
- sharing staff: e.g. a music director, youth worker or admin officer; or
- obtaining financial support to pay for a missional activity.

¹ *Better Together – Making church mergers work*; A Leadership Network, 2012 J Tomberlin and W Bird

Mission Pathways

2. Identifying a Potential Mission Partner

The following are some suggestions to identify a path to potential mission partner:

- talking to Presbytery and Synod to create a short list of suitable merger partners;
- talking to other Congregations informally regarding interests, focus and passions, looking for spiritual synergy;
- creating a small task force to look deeper into merger partner opportunities;
- holding discussions within the Congregation to obtain potential partners and consider the “RSL Concept” – See Appendix.

3. Identifying a Mission Partner

Once the Congregation agrees to explore a partnering arrangement, the next stage of the process should include:

- discussions with Presbytery regarding suitable partners and potential issues
- distributing and discussing the Mission Statement with one of more potential partners;
- holding meetings with potential partners, looking for congruency of existing mission commitments and faith;
- agreeing to work together and obtaining support from both Congregations to continue structured discussions and planning;
- creating a short document with commitments for each partner; which ultimately may lead to a covenant document or MoU. (See Step 6)

This process above is a generic one and can be adapted to the need of the conversations.

4. Preparing for a Formal Mission Partnership or Merger

Preparing for a formal merger is similar to that for a partnering agreement. To aid successful outcomes, both would start with a meeting of minds and hearts; and with a commitment to the Gospel; as the cornerstone for this new venture.

However, given the UCA structural change which may ultimately eventuate from a merger; proposals from Congregation will require agreement from the Presbytery so involving them early is recommended. ²

The Congregation initiating this conversation should spent time preparing a document outlining:

- Church vital statistics: finances, buildings and property status, spiritual and personal preferences;
- ‘show stoppers’, i.e. issues that may cause a partnership to fail;
- potential issues and risk management strategies (see Appendix); and
- preferred characteristics of a merger partner.

² See Regulations : 3.4 FORMATION, ALTERATION OR DISSOLUTION OF CONGREGATIONS OR COUNCILS for Presbytery and other responsibilities

5. Merger discussions

A merger is far more serious commitment than a partnering agreement. It is more formal within the UCA structure, and requires approval and amendments to Synod and Presbytery records.

When initiating a merger conversation take time to think about what the merger may entail and what synergise are to be created. This should be a high-level discussion and not get bogged down in detail at this stage for fear of killing off the initial excitement and enthusiasm in exploring a new relationship.

Some suggestions to break the ice prior to commencing deeper conversations include:

- holding informal meetings first;
- having fun together / attending events;
- researching and looking for resolution to potential future issues; and
- agreeing to meet at Synod or Presbytery training / meeting opportunities.

When it is felt ready to discuss details, some specific issues include:

- which church location(s) shall we utilise?
- services: times, music and worship style, communion, responsibilities;
- ministry roles and supporting personnel;
- responsibilities: elders, music, children, pastoral care;
- church council: size, concerns, preferences and meeting schedule;
- Information management: emails, phone, website and other social media accounts;
- outreach programs and managers; existing groups and potential duplications;
- manse location(s) and their future use;
- how major events are celebrated; and
- finance, tied bequests, endowments

Importantly, a new name for the merged entity should be found.

It is recommended that it does not refer to one of the existing Congregations nor the suburb in which worship is held.

Mission Pathways

6. A Memorandum of Understanding (MoU) or Covenant

After several successful gatherings and if the energy and excitement is still there; a MoU or Covenant is to be prepared in draft form for discussion

If this has not happened before, Presbytery must be consulted at this stage to align with responsibilities within the Regulations. This process may also see the commencement of a Life and Witness Consultation to discern and progress matters.

After agreement by all parties to merge, the document should be formalised and signed by the Congregations and Presbytery, then presented to Synod.

It then becomes a formal UCA document to enact any resulting structural changes.

7. The Merger Celebration

Achieving a signed MOU is a major milestone. Well done good and faithful servant!

Now it is time for celebration.

Celebrations are helpful in raising spirits and making people feel good about achievements. They can generate a great sense of pride and thankfulness that things are going well and the Spirit is moving. They can also:

- provide a sense of achievement, satisfaction and camaraderie;
- encourage new adventures and friendships;
- cement a sense of moving forward together; and
- be catalyst for thinking about new ideas, and endorsing the future.

With both parties joining together in celebration, it is possible that new synergies will be formed, which can only strengthen one of the initial aims of greater mission and outreach adventures!

Plan to enjoy a commitment to furthering the mission together, and take time to celebrate this. However, note, the work is not over yet, and the extent of planning undertaken thus far will determine how much more effort is required in the remaining steps.

STEP SEVEN – WALKING TOGETHER & FINE TUNING

Bible Verse:

Jesus looked at them and said: ‘With man it is impossible, but not with God. For all things are possible with Him.’ Mark 10:27

Introduction:

STEP SEVEN aims to ensure a smooth merger; one that will result in a happy sharing of church life, mission and commitments.

An important step here is some form of formal post review.

Typically, people will feel a sense of relief after the satisfactory merger, because the main issues have been resolved. However typically there is a wide variety of issues remaining; that require additional thought, understanding and compromise.

While issues can be uncomfortable, glossing them over can escalate rather than resolve them. Similarly, it is important not to tackle an issue too soon, but rather think about it and work through a joint solution.

The formal merger is just the beginning of a new relationship. When issues arise, as they will, good team work and testing the new relationship decision making process will be time well spent.

1. Communications – solving gnats and shifting land mines

We all like to talk. We know the tongue is a wonderful thing and can lift spirits and inspire others to do great things. However, **James (3:15)** tells us that ‘the tongue is a small part of the body’, and it can also cause problems.

Understanding how to negotiate and resolve issues is very important and some management suggestions include:

- getting outside help for the new combined Congregation to improve conflict resolution skills;
- resolving major issues promptly or enact a plan to do;
- keeping cool and taking time out when needed so that major items are addressed at a time with clearer hearts and minds;
- using the UCA consensus model for decision making; and
- obtaining independent professional input for complicated issues.

It is important to establish a forum and process to resolve issues so that policy is not “made up on the fly”.

Mission Pathways

2. Ongoing issues

Not all decision and identified issues need to be solved on Day One.

It is likely and should be expected that there will be some undecided issues that need to be resolved after the formal merger. Ongoing issues can include:

- location: naming rights and location (church, manse, playgroup, groups);
- seniority, responsibilities and accountabilities;
- elders and church council: who, elections, size, meeting times and place;
- finances: treasurer, endowments, salaries;
- services: when, who, choir, preacher, prayers, rosters;
- mission outreach programs, style, focus and funding; and
- what we no longer run / operate jointly that may have existed in one of the Congregations before the merger.

Naming these are important, just as is setting a timeline for their resolution. They should not delay the ultimate larger prize of merging to enhance mission.

3. Support

The merger may cause pain and sorrow, as well as anxiety and anger.

Consequently, good pastoral care will be a great benefit to all, even those not suffering. The Presbytery's Pastoral Relations Committee (PRC) can be most helpful here.

4. The finals

Respecting the past while embracing the future is important.

Should the merger result in the closure of a service time or activity the following suggestions for the closure are:

- hold a final combined service / activity;
- allow time for rituals to be honoured then close that door – physically as well as metaphorically; and
- embrace history, then let it be just that: history.

STEP EIGHT – MAKING A GOOD THING BETTER

Bible Verse:

Rejoice always, pray without ceasing, give thanks in all circumstances; for this is the will of God in Christ Jesus for you. 1 Thessalonians 5 16-19

Introduction:

STEP EIGHT aims to make a 'good thing better'. That is: it aims to resolve any issues and to make the merged Congregation life flourish as intended.

1. How did we do it?

This task includes compiling the story of the merger and collating the relevant records.

This should be documented in no more than 15 pages.

Photos within an appendix are recommended and the final document should be made available for the whole new Congregation to enjoy and reflect on the journey taken.

The task should be undertaken within six months so that the ideas and learning are still current.

2. Another review

After another six to nine months, the new Church Council should undertake a post review.

Any successful business regularly reviews how the operations are running by analysing and asking for feedback. That process is mirrored in this Pathway.

Within STEP Three, i.e., making an inventory and undertaking a SWOT analysis; along with an assessment of mission, values and performance are important steps.

Undertaking this review is helpful in:

- finding how well the merger is working;
- how happy the merged parties are and where their needs and benefits have been realised;
- checking for difficulties and managing show stoppers;
- identifying hidden issues, and obtaining suggestions for improvement;
- how are we being good stewards with what we are entrusted?
- how are we living mission? and
- how are we responding the community?

Mission Pathways

At this time of reflection some new meeting rules may want to be considered to ensure this is a productive time and not unravel the hard work undertaken. These rules could be:

- no complaints are to be raised without suggestions for improvement;
- make a wish list of improvements with a timetable;
- take the 'temperature of the Congregation' again using a rating / assessment model (e.g. sad, happy, confused, excited, hopeful in anticipation etc.);
- celebrate successes, no matter how small; and
- encourage and endorse initiatives.

3. A new Mission Plan

Within a year of merging, work should be undertaken to form a new Mission plan. This is not to rewrite of existing documents, but a forward-thinking strategy document to direct and guide resources. There are many more UCA documents and guides which help with Mission planning and your Presbytery or UME can be consulted for further guidance.

Refer to STEP FOUR for more details in this regard.

4. Celebrating again; JOINTLY

Rejoice, Rejoice and again I say Rejoice³

Remember the benefits of celebrations as outlined in STEP 6

They are helpful in raising spirits and feeling good about past achievements, along with looking forward to the future.

5. Post-Merger – New Joint Council Governance

After a successful merger and time of celebration, creating a new joint Council is recommended. Its tasks should involve making a 'good thing better' e.g. by reviewing, amalgamating and/or improving:

- communications – internal and external, spiritual, social, outreach and advertising material
- compliance (legal, Synod, MoU, ACNC etc)
- financial delegations
- resources and their uses
- WHS and training
- creating reporting cycles.

To ensure operations continue to run smoothly both in the present and in the future, the Church Council, plus members from the congregation, should look at how things are currently work, and how to make them better.

APPENDICES

A Merging Success Story

In the 1990s, two neighbouring Congregations (one with Presbyterian roots, the other with Methodist ones) started to talk about working and worshipping together because each was without a minister. Both Congregations lost significant numbers of people and donations. They lived in the same neighbourhood and all were members of the Uniting Church – even though there were differences in theology.

The two Congregations decided to share the minister and services once a month. This situation worked well. However, the minister was doubling up on meetings, e.g. two church councils a month, and other administrative functions. Some of the parishioners were interested in a deeper relationship between the two Congregations and this idea was shared informally.

In time a vote to combine both Congregations was proposed and was successful. It resulted in new opportunities to work together, like combining mission programs, community engagement and fundraising. The successful mission component of the combined Congregation was inspiring.

Next, the two Congregations decided to sell one property and demolished both churches. This was done to share both Congregations' sense of loss. Funds from the property sale helped establish new buildings that were better suited for worship, engagement and the needs of the current time. This was a very welcomed change within the local community.

The sense of unity and commitment to these initiatives encouraged everyone to raise funds, undertake more outreach and encouraged new members.

The Congregation grew in love and mission and have never looked back.

.....

Some leanings from the story include:

- ensuring equality of loss and equality of reward to reduce feelings of rivalry;
- undertaking pastoral care to help those with feelings of loss and disappointment;
- knowing when to move on and focus on the potential good news;
- understanding some members will leave, but ensuring it is on good terms with pastoral sensitivity;
- not focusing on bricks and mortar or the sentimental value of it;
- focussing on making a good thing even better; and
- keeping your 'Eyes on the Prize'.

Change Management

Reasons for change ⁴

The world is constantly changing, socially, economically, spiritually which results in a constantly evolving environment. For example, mobile phones have revolutionised communication methods and the way we interact over the past 20 years.

Organisations, including churches, need to learn to become comfortable change as well.

Therefore, the ability to manage and adapt to organisational change is essential. Due to the growth of technology, modern organisational change is largely motivated by external events rather than internal factors. When discussing businesses, the organisations that adapt quickest tend to be the most successful.

However, churches have a different model and often find adapting to change considerably harder. None-the-less, churches need to address and learn how to handle change to continue to thrive, flourish and add meaning back into their community.

Change models

There are many successful change management models available. The following one is shaped like a pyramid and consists of four stages:

1. Determine Need for Change
2. Prepare & Plan for Change
3. Implement the Change
4. Sustain the Change

This is the model identified in this Pathway.

Project Management

Project management is generally described as:

- identifying all the tasks that are required to achieve the project goal in a timely, cost effective manner and that meets all the client's requirements.

Task 1 - Project Plan

This task defines the Big picture: e.g.

- Project goal (vision) and key objectives;
- Major tasks (to be broken down to more manageable steps in a later process);
- Resource management (time, finance and staff);
- Obtaining approval at key, designated hold-points from the client (e.g. the Congregation, Presbytery, and Synod).

Task 2 – Time management

'Time is money' is accurate. So, it's important to:

- Identify all tasks, their objectives and their length;
- Identify the resources required;
 - both human (paid/unpaid) and
 - physical items (owned / borrowed / hired / purchased)
- Know how much time has been allocated to a task and stick to it;
- If the scope increases, discuss implications and funding models early before proceeding with the change; and
- Use planning / project management software to help record and track these things.

Task 3 – Record keeping

- Keep track of all payments, in or out and keep financial records up to date at all times;
- Keep good records of all you do (phone calls, meetings) and confirm by email;
- Good records will reduce rework and provide accountability and transparency. They also help move forward once a decision has been made, and can be produced if someone wishes to revisit old conversations, so that old ground is not recovered; and
- Use standard templates for meeting minutes and other project documentation.

Task 4 – Legal compliance

Legal compliance is essential. Short cuts are not recommended as they can cause untold problems at the time and/ or down the track. In addition, mistakes can erode any initial benefit in time or funds as well as undermining respect.

There are many people who can help with legal requirements, e.g. from Synod, the local Town Council especially for matters about property, the taxation department, local school etc.

Mission Pathways

The idea to transgress and then ask for permission later is not a good one. It could be very expensive and depending on the transgression, it could shut down the project.

Task 5 - Delegation, Roles and Responsibilities

No one can do everything and the work in this Pathway re **Forming the Team** encourages spreading tasks and responsibilities around the Congregation.

Typically, a project requires expertise in:

- planning
- meeting management
- PR and communications
- finance
- pastoral care
- and more.

These skills are seldom found in one person, so it is recommended that a well-rounded team is formed with clear assignment of roles.

Team theory is useful, especially for the team leader, who may, at times, be left wondering what is happening in the team. The theory notes that there a number of stages that need to be addressed before the team will work well. The main stages are:

- forming – setting up the team, ‘getting to know you’
- storming- starting the project, allocating for key roles and responsibilities
- conforming – settling down to the tasks at hand
- performing – successfully working together to create the designated product.

In addition, team theory recommends a rounded team with some of the following personalities (depending on the task at hand):

- **The Leader:**
is responsible for maintaining calm, managing conflicts, maintaining communications and keeping everyone on course. A good leader knows how to delegate.
- **The Team Player/s:**
are enthusiastic and willing to help and/ or compromise. They are enthusiastic and work together for a common good.
- **The Researcher:**
asks questions and then finding their own answers. If you need more information to complete your analysis, it’s important to have a strong researcher who can get it. Researchers often ask the overlooked questions that can avert a future impediment.

Mission Pathways

- **The Communicator:**
is generally friendly, has many contacts, happy to talk in most situations and provide lucid ideas and is persuasive.
- **The Planner:**
is self-motivated, forward looking, on time, organised and happy to organise others.
- **The Pastoral Carer:**
is patient, caring, insightful regarding others, happy to support others, and give emotional and spiritual support.

There are other useful skills, like being artistic, etc.

Delegating, at times, is useful as it reduces stress on the team leader. Micro managing can also be exhausting hence the need for different responsibilities. Each person involved and should have a delegated responsibility with clear guidelines of expectations and timeframes.

Task 6 - Stakeholders

A stakeholder is someone who can affect or be affected by the project.

It is important to know who the project stakeholders are; and to understand their needs. It may not be possible to satisfy everyone but it is important the concerns and interests are considered during the planning process.

Task 7 – Meeting management

When a group of people start reviewing a situation or making changes, the process generally revolves around meetings. It's been a tried and tested operation dating from the Greeks!

Meetings obviously comprise of discussions and negotiating in order to arrive at an agreed decision. The UCA is fortunate in having a successful method of consensus decision making. When using the Pathways document, we recommend continuing to use this model.

Previous experience has also shown that the Pathways model provides a relatively quick way to reach a robust and defensible outcome, whether it is for a new partnership or a merger or perhaps a decision to wait for further guidance.

Some useful tips for meeting management suggest:

- a) including ALL stakeholders, from early planning meetings to the end of the decision making process,
- b) specifying at the start of the process, an agreed timetable (which includes discussion, prayer and decision making),
- c) setting some house rules, e.g. politeness, e.g. IB4U (as in 'I feel that you...'),
- d) using consensus voting unless the congregation agrees otherwise,
- e) use the 4 Step strategic Planning process, as defined in the Pathways, page 16.

Mission Pathways

This process of Mission Planning can be done in a day, if necessary, assuming the discussion revolves around a minor issue only. Needless to say, undertaking the process in four weeks or possibly four months is better as it allows time for thought and research.

Task 8 - Project records and closure

Keeping timely, clear records can help the project stay on time, keep on budget, maintain quality control and reduce costs by eliminating rework.

Final records are also important. They are useful in assessing if the project met its objectives; helping identifying if similar projects are undertaken in the future or to clarify any issues arising at a later date.

The Church Council records should also record and retain a completed set of any final / signed documents from the project team, noting a more detailed and thorough set of paper reside with the project.

Task 9 - Project closure then celebrations

This step is important and should be done as soon as possible after completion.

- Getting feedback from stakeholders;
- Assessing project resources, issues and the quality of the outcomes against the initial plan;
- Producing and disseminating a post project report; and
- Celebrating a successful project!

Risk Management

Potential risks are to be found everywhere – on the street, in the car and at home. A risk could have a small impact at the time, but the ramifications could be extensive.

The concept of risk is well documented elsewhere⁵ and an international standard exists⁶ for its measurement, assessment and mitigation.

Some possible risks likely to be found during a merger process include:

- Legal risks – e.g. insurance, public indemnity, property issues;
- Spiritual risks – e.g. a loss of spiritual commitment;
- Emotional risks – e.g. serious feelings of sorrow and loss;
- Social risks – e.g. disagreements and loss of friendships; and
- Financial risks – e.g. increasing building maintenance demands.

Once a potential risk is identified it should be assessed in terms of:

- Likelihood of the risk;
- Extent of the risk;
- Management of the risk.

It is useful to address the risk process early in the process to help identify risks, their impact and management. Assigning the risk register to someone with experience in risk management is strongly recommended. Prior to starting a project, the risk assessment should be discussed by the project team and key stakeholders.

It is important for the Congregation or project manager to include the Synod when exploring the risk, especially as Synod is familiar with risk management and may have to bear the brunt of any issues.

⁵A very helpful document is *The New South Wales Government, NSW Treasury Risk Tool Kit* Reference: TPP12-03a : ISBN 978-0-7313-3567-1. www.treasury.nsw.gov.au.

⁶ ISO 31000 2009 – Risk Management Principles and Guidelines.

Strategic Management – Planning for the Future

At times, an organisation (which is just as appropriate for our congregations), may wish, or need, to look at how the organisation is faring. For example, there may be a need to look at finances and identify opportunities for fundraising and/or controlling existing spending levels based upon forward projections.

This section describes a simple outline to address this situation. A plan of this nature aims to clarify the existing situation, identify where the organisation wishes to go, and determines a method to get there.

1. What do we have? An inventory

This is the inventory referred to in the body of this Pathway. The inventory should identify items in the following categories:

- All physical items (e.g. location, buildings, property etc.);
- Social aspects (e.g. Congregation's age, interests, regional factors, projects and outreach activities, the local community and its interests etc.); and
- Economic factors (e.g. the Congregation's finances, local economics, funding options etc).

2. Where is it going?

The next stage is to analyse the items noted in the Inventory. The goal is to identify strengths, weaknesses, opportunities and threats (a SWOT analysis) of the Congregation and their local community.

Once this analysis is completed, it is much easier to identify where the Congregation may wish or need to go and or direct resources.

Analyses all items and assigns to a category (i.e. as a Strength or Opportunity).

For example, a new high- rise development will bring new people to the area and thus can be classified as an Opportunity.

Likewise, rezoning of the area for industrial uses could be classified as a Threat due to less people living in the immediate area.

It is possible that a situation could be identified in two categories.

For example, a new high development opportunity identified above could also remove the adjacent playground which was used as the playgroup's outside area, and thus be classified a threat.

Mission Pathways

3. Where do we want to go?

This section identifies:

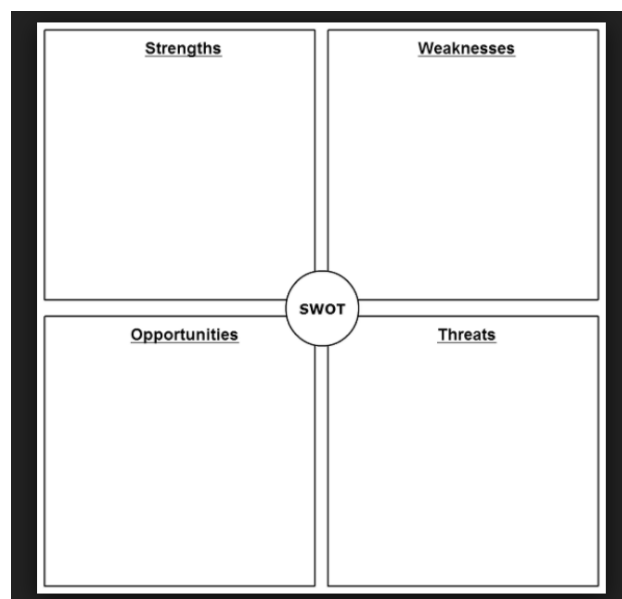
- values (usually single words such as caring, equality, honesty),
- principles (usually ranking items like: A is stronger than B, or Caring is more important than making money),
- outcomes (e.g. what is our vision or mission?)

Good governance occurs when decisions are based pre-established values and principles. The formation of values and principles should be well discerned and then documented.

How to form this into a Strategic Plan

Using Question One and Two: What do we have? Where is it going:

1. Break into groups and allocate the inventory identified items to assign to the SWOT. Forming a large-scale map as per below maybe of use in this step.



2. Regather so that the whole group can look at the sheets in sequence and assign a spokesperson to comment on their assessment.
3. Rank all the items in S/W/O and T so that the top 8 are noted for further assessment.

Question Three: Where do we want to go?

1. Break into four groups corresponding to a SWOT category: e.g. 'Threats'. Each new group is to align the top 8 items to the predetermined values, principles and outcomes, so determine any match.

Mission Pathways

How do we get there?

The answers to Question 3 should guide this process along with the Step outlined in this Pathway.

All proposed actions should be tested by the group; and summarised for a Congregational meeting. This process and the results should be minuted and be used to commence a mission plan.

The RSL Concept

Consider the RSL and who is eligible for membership?

Typically, upon entry to an RSL you will see a map like this, with boundaries marked



Construct a similar map for your Congregation

- Who are your UCA neighbours within a 5km radius
- What other denominations are on the map?
- What Support and Community Services exist within this area?

Why not have conversations with them?

The Presbytery could also be of us in establishing an initial conversation and relationship if there is not already one established.

COMMENTS AND RESPONSES

The draft Mission Pathways was circulated to a number of people, especially to Jim Mein SCC Chairperson, (now retired), Ann Hogan, SCC Chairperson and Graham Perry, SCC Presbytery Minister. They – and others - have all kindly – and most helpfully - commented on the Pathways document in order to:

- Reduce overlaps including with other documents,
- Ensure clarity of text,
- Ensure the Pathways will be useful.

Responses to Comments

1. Naming

There may be a confusion of name and naming rights due to other documents which have recently been produced, where 'pathways' has also been included in the Name.

As this document is the product of a Synod initiative, we have not changed the name, at this time. In addition, the title clearly describes the document content and intent.

Consequently, we are leaving the name as it is. However, we are open to change, based on suggestions from Synod and other interested parties.

2. Using Pathways

The specific reasons and triggers for using Pathways are generally included in the document.

However, we take on board suggestions that there are other opportunities to look at, and ways to use, Pathways. Suggestions include:

- a) Placing the document on the UCA website,
- b) Encouraging all congregations to undertake regular reviews of their church and congregation, using the Step 4 Strategic Plan in Pathways,
- c) And/or Presbyteries may consider using the document as a step in the Life and Witness considerations,
- d) Presbytery or Synod could provide an annual reminder that the Mission Pathways document is available on line and a hard copy could be available.

3. Cost/ benefits

Cost/benefit analysis is generally reviewed strictly in terms of finances. However, while keeping track of finances is essential, there are always additional issues to be addressed, including time issues, location and emotional issues. Addressing these other issues in a caring and professional manner may provide benefits that are more important than finances.

Mission Pathways

We consider that these matters are sufficiently covered in relation to Pathways' goal. However, if additional information is required, there are many people, both inside and outside the Uniting Church, who can be consulted if necessary.

4. A broader vision

We, the authors of this document, are committed to using Jesus' Great Commission with its focus on mission and growth as the key to what we are trying to achieve: that is - mission and growth and a personal experience of the love of God.

However, we take on board comments regarding a broader vision for the Pathways, especially when addressing mergers.

The following comments from the *Basis of Union* should inspire us to undertake new mission endeavours.

The Uniting Church recognises that it is related to other Churches in ways which give expression, however partially, to ... unity in faith and mission.

Recalling the Ecumenical Councils of the early centuries, the Uniting Church looks forward to a time when the faith will be further elucidated, and the Church's unity expressed....

It thankfully acknowledges that the uniting Churches were members of the World Council of Churches and other ecumenical bodies... It remembers the special relationship which obtained between the several uniting Churches and other Churches of similar traditions and will continue to learn from their witness and be strengthened by their fellowship.

5. Managing change

We believe using the Mission Pathways can result in meaningful outcomes between congregations. While much of the Pathways is original, much of it is also based on successful outcomes in other congregations and organisations, in Australia and overseas.

We, the authors, have had extensive experience in strategic planning and would be happy to help other congregations to undertake the partnering or merging program.