

East Central Ontario Regional Council
Guidelines to Help Communities of Faith
Amalgamate Well - November 2023

The decision of two or more Communities of Faith (COF) to amalgamate is often difficult and emotional, and usually, it follows much prayerful deliberation. While Communities of Faith may decide to amalgamate for many reasons, often they have discerned that they simply cannot continue to carry out their ministry alone. There may be grief, but also excitement and relief as two or more Communities of Faith join to form something new.

The following steps are intended to help Communities of Faith do this work well by identifying and addressing many of the matters that require particular energy and attention.

BEGINNING THE PROCESS

1. A Community of Faith should reach out to neighbouring Communities of Faith to determine interest in amalgamation. This could be done by the governing body or by asking the region to facilitate a conversation about possibilities. The Staff Lead or the Minister, Support to Communities of Faith and Right Relations could support Communities of Faith in beginning this process.
2. Whether you involve the region now or at the time of decision-making, it's a good idea to keep the region informed of steps you are taking.
3. When talking with other Communities of Faith, it is important to determine what you have in common and if both or all the Communities of Faith are interested in amalgamating. For an amalgamation to be successful, it is helpful to have similar beliefs, values, and missional goals.
4. If two or more Communities of Faith are interested in a possible amalgamation, the governing bodies, or a designated group from the Communities of Faith, would develop a proposal to amalgamate.

DECIDING TO AMALGAMATE

1. Each Community of Faith meets separately to consider the proposal to amalgamate. Notice of the meeting, and its purpose, is read during public worship for two Sundays. The meeting may take place the next day (Monday) or any time after that.

Quorum for the meeting:

A meeting of the Community of Faith or pastoral charge may take place only if a minimum number of full members is present, as follows:

- a) for Communities of Faith or pastoral charges with 100 or more full members, at least 20 full members must be present.
 - b) for Communities of Faith or pastoral charges with between 30 and 99 full members, at least 10 full members must be present;
- and

- c) for Communities of Faith or pastoral charges with fewer than 30 full members, at least 1/3 of the full membership must be present. (Manual 2019, B.5.5)
2. If the decision for all Communities of Faith involved is affirmative, the governing bodies contact the regional council. Representatives of the regional council hold separate meetings with each Community of Faith to hear their opinions on the proposed amalgamation.
3. The Covenant Support Team together with the Mission Through Property Team of the regional council recommends to the Regional Council whether to approve the amalgamation and an amalgamation date is set.
4. A Community of Faith's life does not end when it amalgamates with another Community of Faith. Rather, the Community of Faith continues to exist in ministry as the new amalgamated Communities of Faith.
5. The regional council and the amalgamated Communities of Faith enter into a new covenantal relationship.

Consultation with the regional council is encouraged throughout the amalgamating process. The Pastoral Relations Minister or the Minister, can direct you to the resources who can assist you.

PROPERTY

When Communities of Faith amalgamate, the result is often an excess of equipment, furnishings and even buildings. Decisions need to be made about which items are needed by the ministry of the amalgamated Communities of Faith, and what can be declared surplus.

The regional council consults with the Communities of Faith on the property needs of the newly amalgamated Community of Faith. A Community of Faith may ask its governing body to represent it in this consultation.

The regional council may decide that some of the Communities of Faith' property will not be needed for the new amalgamated Community of Faith. Any property that will not be needed is called "surplus property."

The regional council is responsible for all surplus property after the amalgamation and decides how to use the surplus property for the benefit of the United Church.

Before an amalgamation, the trustees of a Community of Faith hold all property for that Community of Faith. After an amalgamation, the trustees:

- i) hold the surplus property for the United Church, to be used as the regional council decides; and
- ii) hold all other property for the new amalgamated Community of Faith.

This change is automatic when the amalgamation takes place. The regional council may choose to appoint its own trustees for surplus property. East Central Ontario Regional Council has a property management agreement with TUCC and may ask TUCC to manage surplus property on behalf of the region. The region will also consult with the United Property Resource Corporation/Kindred Works to determine if surplus assets/Property are suitable for Affordable Housing development, should be held in the Regional Trust Fund for future United Church Regional Ministries or sold with net proceeds held in the Regional Trust Fund or disbursed to Church ministries according to Regional guidelines for Communities of Faith who are disbanding or Amalgamating.

GIFTS AND BEQUESTS

Gifts made to the previous Communities of Faith automatically go to the new amalgamated Communities of Faith, even if the gift document refers to the Communities of Faith by its former (pre- amalgamation) name. "Gifts" include bequests made in a person's will.

AS YOU PREPARE TO AMALGAMATE

Decisions to be Made

1. Determine staffing needs for the amalgamated Communities of Faith
2. Agree upon the name of the amalgamated Community of Faith
3. Determine where the amalgamated Community of Faith will meet
4. Discern the Living Faith Story (ministry vision) for the amalgamated Community of Faith
5. Create a governance structure for the amalgamated Community of Faith
6. Create a newly merged historic roll for the amalgamated Community of Faith

Honour Your History:

- Set the date for the last worship service for each Community of Faith. Consider who you might invite, special music, reception details etc.
- Plan a celebration honouring the years of faithful ministry or hold a series of special events in the time leading up to the final service.
- Arrange for registers (baptism, wedding, burial, historic roll), minutes and other documents from each Community of Faith to be sent to the archives.

Care for your Members:

- Communicate with all members about the amalgamation, letting them know that their membership will be carried into the newly amalgamated Community of Faith. This may also be an opportunity to update your membership roll.
- Adherents also need to know about the amalgamation.
- Ensure everyone knows when and where the community of faith will be gathering for worship. Provide updated contact information.

Care for your Staff:

- Give proper notice to lay staff. Consult with a lawyer if needed.
- Give proper notice (90 days) to all ministry personnel, called or appointed as needed.
- Give proper notice to ADP.
- Fill out Record of Employment forms, final tax documents etc.

Care for your Finances:

- Arrange for the final charitable tax return to be filed for each Community of Faith.
- Arrange to have Canada Post forward all mail to the new address for one year to ensure nothing gets missed.
- Determine what charitable number will be used for the amalgamated Community of Faith and notify CRA of the changes.
- Update the church name on any investments and bank accounts.
- Update signing authorities.

Care for your Property:

- If you have a cemetery, arrange for ongoing management which might mean transfer of operation and maintenance to local municipalities. The Bereavement Association of Ontario.
- Sort through all the furnishings and items belonging to the Community of Faith. See if other United Churches have a need for anything, such as hymn books, laptops, chairs, banners etc. While remembering that trustees are responsible for ensuring fair market value is received, you may choose to have a silent auction for items that do not have a high resale value which will no longer be needed. Remember that items donated to the church cannot be given back to donor families, (CRA rules) but they are welcome to purchase them if they are for sale. Items may also be donated to other United Church Communities of Faith and United Church recognized ministries.
- For any item with a higher retail value, such as a grand piano, solid silver or brass items etc. it is best to seek an appraisal and consult with the Mission Through Property Team before selling.

THINGS TO DO AFTER THE AMALGAMATION

- Start with a celebration service.
- Consider ways to help people get to know one another, for example name tags, small group activities, fun gatherings, or a directory. Enroll in Fresh Start workshops to help build a healthy Community of Faith
- Communicate well and often to keep people informed.
- Consider starting a new tradition that represents the new Community of Faith
- Be gentle with one another.

AMALGAMATIONS INVOLVING MORE THAN ONE REGIONAL COUNCIL

If the amalgamation involves Communities of Faith that are within the bounds of more than one regional council, the regional councils involved must.

- a) each approve the amalgamation as a change in the

- covenantal relationship between that regional council and the applicable Community of Faith;
- b) agree on any conditions to be included; and
 - c) get the approval of the General Council. The General Council may make adjustments to the boundaries of the regional councils involved as a result of the amalgamation.

For assistance with any of these steps please contact

Darren J. Liepold (Rev.)
Pastoral Relations Minister
East Central Ontario Regional Council
1 (800) 268-3781 ext. 6116
DLiepold@united-church.ca

Submit information to the Covenant Support Team and /or the Mission Through Property Team for consideration, including:

- *A decision to amalgamate*
- *A change of name*
- *A governance model*
- *Property and asset considerations*

Contact information can be found on the ECORC website www.ecorcuccan.ca for these teams.

Please see the following pages for excerpt from the United Church Manual, 2023

The Manual, 2023

G.1.4 Amalgamation of Communities of Faith

G.1.4 Amalgamation of Congregations

Congregations considering amalgamation must jointly develop a proposal for amalgamation, including a ministry plan for the amalgamated congregation and the resources required. The process for an amalgamation is set out below. The congregation and regional council are each responsible for the steps assigned to them.

Please consult your regional council for resources for ministry plan format. (2022)

G.1.4.1 Decision by Congregations

Each congregation meets separately to make a decision on a proposal to amalgamate, including the proposed amalgamation, the ministry plan, and the resources required. (2022)

G.1.4.2 Regional Council Consultation

The regional council holds separate meetings with each congregation to hear their opinions on the proposed amalgamation.

G.1.4.3 Regional Council Decision

The regional council makes a decision on whether to approve the amalgamation as a change in the covenantal relationship between the regional council and each of the congregations.

G.1.4.4 New Covenant

The regional council and the amalgamated congregation enter into a new covenantal relationship.

G.1.4.5 Property

The regional council consults with the congregations on the property needs of the new amalgamated congregation as set out in the ministry plan. A congregation may ask its governing body to represent it in this consultation. (2022)

a) Surplus property of amalgamating congregations: The regional council may decide that some of the congregations' property will not be needed for the ministry plan of the new amalgamated congregation. Any property that will not be needed is called "surplus property." (2022)

b) Use of surplus property: The regional council is responsible for all surplus property after the amalgamation and decides how to use the surplus property for the benefit of the United Church.

c) Change in property ownership: Before an amalgamation, the trustees of a congregation hold all property for that congregation. After an amalgamation, the trustees

- i) hold the surplus property for the United Church, to be used as the regional council decides; and
- ii) hold all other property for the new amalgamated congregation. This change is automatic when the amalgamation takes place.

G.1.4.6 Amalgamations Involving More Than One Regional Council

If the amalgamation involves congregations that are within the bounds of more than one regional council, the regional councils involved must

a) each approve the amalgamation as a change in the covenantal relationship between that regional council and the applicable congregation;

b) agree on any conditions to be included; and

c) get the approval of the General Council. The General Council may make adjustments to the boundaries of the regional councils involved as a result of the amalgamation.

G.1.4.7 Congregation Continues to Exist

A congregation's life does not end when it amalgamates with another congregation. Rather, the congregation continues to exist in ministry as the new amalgamated congregation.

G.1.4.8 Gifts and Bequests

This section (G.1.4.8) applies to gifts made to a congregation that has amalgamated, whether the gifts are made before or after the amalgamation. "Gifts" include bequests made in a person's will. The gift automatically goes to the new amalgamated congregation, even if the gift document refers to the congregation by its former (pre-amalgamation) name.

There are resources about amalgamations to assist congregations and regional councils. See the Congregational Board of Trustees Handbook available from the General Council Office.

General Council Office.