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### Joining Together and Getting to Know You: A Case Study German Evangelical Martin Luther Church of Ottawa Inc. and Mount Calvary Lutheran Church Ottawa

Gudrun Curri

Marianne Thornton

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# **'Joining Together and Getting to Know You' – A Case Study German Evangelical Martin Luther Church of Ottawa Inc. and Mount Calvary Lutheran Church Ottawa**

**Gudrun Curri and Marianne Thornton<sup>1</sup>**

## **Introduction**

### **Purpose**

**T**he purpose of this case study is to provide readers/students some insights about factors critical to a successful joining of two congregations based on feedback from a sampling of congregation members, pastors, councils and the synod involved in a German/English language church. Other churches in similar situations might benefit from the lessons learned about the impact on the congregation(s) of the merger and the challenges members face belonging to 'one church' which consists of two congregations.

### **Research Question**

What has been the experience of congregation members, pastors and the synod involved in the joining of Mount Calvary Lutheran Church (MCLC) operating in English with the German Evangelical Martin Luther Church of Ottawa Inc, (MLK) operating in German. Although both share the Lutheran faith and came together for mutual benefit, their approaches to culture, language, rituals and outreach to the community differ.

### **Literature Review**

Many small churches in Canada are confronted by declining populations, aging members, aging church structures and loss of revenue.(Cheung, 2019) The literature on small churches facing these challenges is well documented and includes books and articles as well as case studies, cf. (Cheung, 2019; Munshaw, 1996; Puddicombe, 2013) Due to the short time available for the project, the literature review was limited to an online search on recent church amalgamations and mergers in Canada.

### **Definitions**

In this case study:

- 'Congregation' refers to the Mount Calvary Lutheran Church or the German Evangelical Martin Luther Church of Ottawa Inc. as they existed prior to the joining together on January 1, 2018.
- 'Merger' or 'Amalgamation' is used to describe the process by which the two congregations joined together.

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<sup>1</sup> Dr. Gudrun Curri is a retired associate professor at Dalhousie University in the Faculty of Management teaching organizational change and international management. Marianne Thornton, is a retired Physiotherapist and lifelong active member of the Lutheran Church. She currently calls Martin Luther, Ottawa her church home. The authors wish to thank the council and pastors of Martin Luther Church/Kirche, Ottawa. The authors are not aware of any conflict of interest to declare.

- 'Martin Luther Church/Kirche' refers to the German Evangelical Martin Luther Church of Ottawa Inc. prior to the merger, and to the two congregations joined together and operating as one church after the merger.

### Disclaimer

The authors of the study fully understand that from a strictly legal point, this was not a merger but the dissolution of an unincorporated church body and the acceptance of all its members and property by an established incorporated church. However, in terms of analyzing the process and its outcome and identifying organizational, cultural and institutional challenges, the authors felt it is best to use the generic meaning of merger and amalgamation for this case study.

It should be noted that the results of the case study are not the opinion of the synod or of either author, but rather reflect the records of both congregations prior to, during and after the process, as well as the views of the individuals who were interviewed. Accuracy of the review of minutes was verified with a council member of each congregation. Background information was reported based solely on council minutes from both congregations. Responses to questions in Outcomes are taken from transcribed interviews with no attempt to modify or interpret what was said. In some instances, comments have been paraphrased.

The intent of this paper is not to study the legal, fiscal, or technical process of the coming together, but rather the personal and cultural process.

### Project Design and Methodology

Approval was received from the MLK Council to complete the study, which was designed and completed by two members of the merged church, one from each of the former separate congregations. They developed an open-ended interview guide consisting of six major questions (see Appendix 1) and used this to conduct interviews. Ten individuals who were part of the merger process were invited to participate in face to face interviews and all agreed to take part. The interviewees included the Bishop of the Eastern Synod of the Evangelical Lutheran Church in Canada (ELCIC), the pastors of the two congregations, a member of the church staff, and six members representing both congregations. It is accepted that the richness and depth of qualitative data compensate for small samples. Interviews were conducted jointly by the two researchers. To gain meaningful information interviewees were informed about the nature of the study and assured confidentiality. To establish trust with the participants the term 'amalgamation' was used during the interviews rather than the Synod term 'merger'. To ensure accuracy, permission was obtained to tape record the interviews. The interview tapes were reviewed, summarized, and coded to ensure confidentiality. To analyze the data, the interview questions were converted into research statements (see Discussion). The two researchers summarized the interview data and scored the responses to the research statements using the seven-point Likert scale.

To understand the history of the merger the research team reviewed church records, minutes of council and congregation meetings as well as correspondence of both churches going back to 2013. Next the background information thus obtained was organized chronologically for each church.

## Background

### Mount Calvary Lutheran Church (MCLC)

At the 2013 Annual General Meeting, (AGM) the pastor at the time said that to survive financially ‘things would have to happen differently in future’. At about this time MLK, which was also facing challenges, approached MCLC to explore possibilities of shared ministry. However, there were no follow-up discussions and a memorial donation in 2014 helped with the finances.

In 2015 the congregation was advised by the pastor that MCLC should be ‘exploring ways to work with other churches in the community to share/complement each other’s outreach activities’. In other words, a ‘direction change was required’ for the sake of more effective ministry and sustainability of the worshipping community.

An interim pastor was in place from 2015-2016. A new pastor arrived in January of 2016. After the 2016 AGM finances were reviewed and strategizing began. Due to unexpected maintenance expenses \$10,000 had been withdrawn from investments. Static membership, declining revenue, deferred maintenance costs, and a shrinking volunteer base were reported, and it was noted further that most members lived more than 3km from the church. Taken together these issues raised the wider question of the future of the church. Specifically, what options were available?

The pastor worked with the council to develop several options: merging with another of the Lutheran Churches in Ottawa, dissolving the congregation, remaining as a worshipping community with the Synod maintaining the property and allowing the people to continue worshipping without cost and without the possibility of calling a pastor, merging with a neighboring Anglican Church, or continuing in the current state.

In October 2016 the council of Martin Luther Church/Kirche (MLK) suggested a friendly get-together with the MCLC council to explore potential models for sharing ministries. Although the previous conversation had yielded no result, there seemed no reason not to try again. Subsequently the MCLC council met with the Assistant to the Bishop of the Eastern Synod to talk about the way forward.

By early January 2017 the MCLC church council decided to recommend to the congregation at the AGM that the most viable option would be to pursue a merger with MLK. Property rights of MCLC would be lost if a merger took place with a local Anglican church, and none of the other Lutheran Churches had indicated a desire to engage in conversations about amalgamating. Continuing in the current format was not considered an option. At the 2017 AGM, the finance report was presented, including a long-range forecast of 3-5 years that MCLC could sustain the status quo with a part time pastor. The congregation agreed that engaging MLK in further discussions about merger would be appropriate.

In March 2017 representatives of the councils from MLK and MCLC met to talk informally about the potential for a partnership. That informal conversation led to more formal discussions. In June 2017 both congregations voted to work toward the model of one-church-two- congregations. Over the course of the year, several initiatives were undertaken to more fully engage the two congregations. Finally, at separate congregational meetings on Sept 24, 2017, the members of each congregation voted independently to merge as German Evangelical Martin Luther Church of Ottawa Inc., located at 933 Smyth Road, Ottawa. The merger would be based on the proposals set out in a draft covenant for a merged ministry. On November 5, 2017 the members of MCLC approved the official merger agreement.

The Eastern Synod of the Evangelical Lutheran Church in Canada approved the dissolution of MCLC and its merger with MLK effective January 1, 2018. This meant the formation of one church, meeting in one building, with one council that would include members from each of the two congregations, two weekly worship services (one conducted in English, and one in German), and continuation of all the programs associated with each of the original congregations. It was understood that the long-term goal was the eventual emergence of an amalgamated congregation served in two languages. Work to effect a smooth transition began in earnest led by the two councils and pastors. The transition included several joint worship services, the highlight of which was the celebration of MCLC's 60th anniversary and the dedication of Mount Calvary Hall for Fellowship.

#### [German Evangelical Martin Luther Church of Ottawa Inc.](#)

At the March 2013 Annual General Meeting, the construction of a 42-storey condo building immediately adjacent to the church was announced. Objections previously addressed to the Ottawa City Building Planning Committee due to the negative impact on the church building had been dismissed. Throughout the summer of 2013 council considered several options concerning what to do in light of the planned high-rise building construction next door. One, the developer offered to build a new church including space for the church-sponsored German Kindergarten, but the location offered was unacceptable to the congregation. Two, MLK offered to sell the property to the developer but the developer did not accept the asking price. Three, a third party offer to purchase the church was also rejected by council.

During the fall of 2013, MLK contacted three Lutheran churches to discuss possibilities for a merger or amalgamation. One church proposed a one-year trial based on the one-church-two congregation concept but there was no interest from the other two. A temporary move to another Lutheran church was considered but rejected. During that time Mount Calvary Lutheran Church (MCLC) expressed interest in sharing facilities and creating a possible partnership. By the end of the calendar year donations to MLK were down significantly despite the successful annual Sauerkrautessen fundraiser.

At the 2014 AGM in March it was decided to initiate discussions with Mount Calvary Lutheran Church (MCLC) to consider a one-church-two-congregation merger. In the summer, the developer again offered to purchase the church property with possession by January 2015 and to assist the MLK in either locating temporary accommodation or moving outright to another location. The developer had previously built a church as part of a condo construction but retained ownership of the 'new church' property. Council was not convinced that the congregation was interested in selling the church property or moving elsewhere and advised the developer accordingly. There was a smaller deficit than expected due to reduced maintenance at the end of 2014.

At the April 2015 AGM council reported that despite considerable efforts it had not been possible to find a partner church in 2014. By the fall of 2014 diminishing contributions from the congregation again became a concern. However, it was noted that the Book Circle was well attended, and the Sauerkrautessen fundraiser had again been successful. Following the visit of a representative of the Evangelische Kirche in Deutschland in October and the release of the Ottawa Ministry Area Leadership Team Report in November the MLK congregation addressed, among others, these three questions:

- How does MLK define itself?
  - German speaking congregation, German Kindergarten, cultural events for German speaking audiences (Sauerkrautessen, German Book Circle, German movies)
- What limits MLK?
  - Shrinking financial resources, aging and shrinking congregation, less German immigration
- How could the Ottawa Ministry help?
  - Find a partner church and explore merger/amalgamation options

The pastor and chair of council attended a meeting of the Ottawa Ministry Area Leadership Team to discuss common concerns and possible co-operation among Lutheran churches in Ottawa.

At the April 2016 AGM the 10% decrease in contributions by church members was attributed to the aging of the congregation and the failure to attract new and younger members; yet the Kindergarten was well attended. The noise of the condo construction next-door was negatively affecting the church; however, the compensation from the developer for the construction work had avoided a budget deficit.

In early 2017 the pastor from MCLC (in her capacity as Dean of the Ottawa Ministry Area) suggested a meeting of all the Lutheran churches in Ottawa to discuss possibilities for co-operation. At the same time the MCLC pastor was invited to attend the 2017 AGM at MLK and given permission by her council to do so. She explained that her congregation had shrunk to the point that it was difficult to find volunteers to assist with worship services and activities. She indicated that the congregation had to decide whether to close or continue by the end of the year. If no solutions were found by that time the synod would call for closure. However, the congregation was willing to consider merging with MLK provided the following conditions were met:

- MLK pastor conducts two worship services every Sunday - one in German, one in English
- MCLC gifts their church property to MLK
- MLK guarantees that the church building on Smyth Road will be completely restored using the funds realized from the sale of the MLK property
- The offer expires June 30, 2017

In early June a joint church service at MCLC was attended by more than 100 church members including roughly 70 from MLK who reported feeling welcomed. However, they noted that the service was different and there was little light in the MCLC church building. To meet the June 30 deadline MLK held a Special Congregational Meeting (SCM) to review and to accept the inspection reports of the MCLC property addressing moisture, air quality, asbestos, etc. The SCM on June 25<sup>th</sup> granted approval to continue co-operation discussions with MCLC (54 yes, 2 abstentions).

At a second SCM in September the congregation approved with the required two-thirds majority (79 to 11) a motion to accept all members of MCLC as members of MLK; transfer the MCLC church property to MLK; accept responsibility for restoration of the MCLC property and proceed with the sale of the MLK property. The pastor explained that both church councils were working on a "Shared Ministry Agreement" to serve as a guideline for the amalgamated congregation. He stressed that a lot of work and effort would be required

to welcome the new members and truly become one church with two congregations with two languages. An amalgamated church council would be elected, and planned changes would take effect at the beginning of 2018.

## Outcomes

As indicated earlier the intent of this case study was to identify the factors motivating members of the two congregations, their pastors and the synod both prior to the merger and during the ensuing period of transition. The interview responses are grouped and reported by interview questions. As noted earlier the term “amalgamation” was used during the interviews rather than the legally correct term “merger”.

### What were the triggers for the amalgamation of the two churches?

While there were a number of different reasons given, two were mentioned by all:

- The shrinking congregation, aging members, fewer younger members, declining volunteers, lack of vitality
- Decreasing financial resources

Not surprisingly, for respondents from MLK the construction of the high-rise condo next door was an issue:

- Construction noise, blocked light, being in the shadow of a skyscraper, not fitting in the neighbourhood
- Need to look at different options to continue as a church and retain its German identity

Respondents from MCLC shared the following issues:

- Need to look at different options to continue as a church
- Desire to start making decisions early so you will have something to pass on
- Our trajectory if we continue as is – death of the congregation

### What are the similarities and differences between the two churches?

A quick comparison of responses shows that ‘differences’ are twice as frequent as ‘similarities’. Congregational culture ranks at the top of the differences:

- Members of the MCLC are more like a traditional congregation focused on community outreach; MLK members are more like members of a club serving German expatriates
- The MLK congregation is more interested in culture, less in the church mission, and is more inwardly focused on serving the German-speaking community; the MCLC congregation is more outward focused on improving the lives of others
- Although both congregations are members of the Lutheran Church, they are not the same:
  - German liturgy and style of worship at MLK is simple with a focus on lovely hymns; MCLC English liturgy leans more toward Catholic/Anglican traditions
  - Eucharist at MLK is offered once a month, at MCLC weekly
  - Pastor’s robe at MLK is black, at MCLC it is white

While fewer similarities were identified respondents mentioned the following:

- Loyalty to the core of 'what it means to be Lutheran'
- Sharing of direct or family German heritage and history
- Enjoyment of music and fellowship by sharing food

From today's perspective, what has gone well, what were the most difficult challenges?

The numbers of responses for both questions are more or less equal. There is considerable agreement among respondents respecting what has gone well:

- The amalgamated church council is working well together focusing on amalgamated ministry. While some changes were perceived as arbitrary, overall the merger was a very well managed process from beginning to end. Council members were mindful of each other's needs, e.g. co-presidents, lots of documentation, transparency
- Both pastors played a critical leadership role leading up to the merger in communicating with the congregations and the councils. Thereafter, the remaining pastor from MLK has been praised for his responsiveness, adaptability, willingness to step up and continued leadership
- The once-a-month amalgamated worship service for the two congregations combines features of both liturgies; the traditions of the German church and the traditions of the English church and is bilingual
- The loss of membership in either congregation has been relatively small mostly due to location. Some unexpected additional members have joined. Surprisingly, some German speaking members are attending the English service because there is now a choice of time to worship

Responses about difficult challenges are more plentiful and varied depending on whether the interviewee was a member of one of the former congregations, a pastor, or council co-president:

- Difficulty getting to know each other with separate worship services
- Both groups lost part of their identity, and many can only see what they lost. Challenge to get the groups to come together
- Cultural differences: German group says things very directly, English group hesitates, is less confidently forthcoming (typically Canadian, eh?)
- Concern about the possible loss of German language and culture
- Physical differences having traditional, symbolic meaning: relocation of the crucifix, reinstallation of stained-glass windows from the MLK church, eternal flame
- Pastor providing two separate worship services (one in English and one in German) on Sunday mornings with very little time between
- managing congregation's expectations; implementing major, or minor changes; overcoming resistance because 'it was never done this way before'

What would you do differently, knowing what you know today?

There was overwhelming agreement among all participants that more attention should have been paid prior to the merger to the differing congregational cultures:

- Have more time to talk about what you as an amalgamated congregation want to be, where you see your special mission
- More conversation ahead of time about how to merge our differing worship cultures
- Bring people together more frequently in advance. They need to know each other, worship together, have conversations, and be comfortable to be partners in a new way
- Know more about each other prior to merger, e.g. styles of worship, worship space
- Know how the MCLC congregation felt about the amalgamation as they had little choice

In terms of practical advice some noted that:

- No one had previous experience with church amalgamations; no consultant was engaged to help with the process, yet technical experts were hired to assess condition of building and grounds and provide financial advice
- A tutorial on the amalgamation/merger process would have been helpful
- It would have been helpful to know more how truly amalgamated congregations come about
- Social events can make a difference in the process of getting to know each other
- More communication between council chairs would have been helpful throughout the entire process of the amalgamation
- Another council retreat would be a good plan

[What do you plan to continue creating in the amalgamated Martin Luther Church/Kirche?](#)

The majority of respondents emphasized the need for the congregation to move towards:

- No longer saying 'their church' to saying 'this is our church'
- Dealing with the frustrations that people experience with their loss
- Good communication, offer opportunities for feedback (suggestion box not well used)
- Conversations in the kitchen; people come together over food
- Discussions at coffee time are very important; is a time of mixing groups
- Both congregations need to bring their vulnerabilities to the table and share
- Combined fellowship time between worship services
- Respondents also stressed the importance of new outreach programs to fulfil the church's commitment to improve the life of others in need:
  - Participating in student meal preparation and serving at 'Open Table' (where local churches provide a meal to university students) worked well as it was a new idea to both groups and carried out as one congregation
  - Offer music, conversation, drop in for food, cooking classes for low income families, nutrition education
  - Outreach brings people in; need to rebuild inside and reach out

[What advice would you give other churches that are experiencing a shrinking congregation and/or financial difficulties?](#)

The respondents were unanimous in their responses that ignoring the situation, hoping it will get better, will only lead to the church's downfall:

- Get real! Face the reality. If you don't do anything about it acknowledge that you will not survive
- Talk to each other; don't wait until the last minute to come together. Take a leap of faith rather than complain
- The numbers don't lie, accept that you may not grow, be honest with yourselves
- It is not a failure if you have 30 people on Sunday in a big church building. It is reality
- Don't fall victim to the 'boiled frog syndrome'

Based on their own experiences, respondents offered a number of suggestions and advice:

- Feelings and value systems of both congregations have to be managed
- Soft skills (e.g. listening, asking for and providing feedback, managing emotions) are as critical as the hard skills (e.g. accounting, finance, asset management)
- Congregations need to take the risk of thinking and behaving outside the box
- Fear and anxiety at the front end of the process are debilitating
- Although the process is scary you need to find ways to keep going
- People only change when the perceived pain of change is seen as less than the pain of the status quo

Respondents also offered a number of practical suggestions:

- The message should be – it is not working, we need to be smart, think about legacy
- Practice the art of the possible, be tolerant, and learn from the other group; accept that there is no ideal solution
- Work on common projects, fellowship important
- Plan ahead, talk informally with other Lutheran churches in Ottawa and the Synod about possible amalgamation
- Try to find a neutral resource person who is knowledgeable about amalgamation/mergers, knows about organizational change, and can work with people from both congregations
- Good communication is critical, repeat and repeat

## Discussion

The purpose of this case study was to investigate the reasons and motivation for two Lutheran congregations, one English speaking and the other German, to merge/amalgamate. It is hoped that the findings might inform other congregations, pastors, church councils, synods, students when addressing the various stages of mergers/amalgamations, namely investigating, considering, planning, deciding, and implementing a merger/amalgamating with another church(s). While each situation is unique, they often share triggers. In addition to driving the initial investigation these will continue to affect the change process by influencing motivation, decision-making and timing. (Curri, 2002)

In the case under consideration the triggers were different for each church. It took roughly two years for each congregation to accept that the status quo was no longer acceptable. During that time, as in corporate mergers, experts conducted property assessments to determine property value and condition, maintenance issues, etc. Options to find a partner(s), to sell, to close the church were investigated diligently. In contrast, little attention was paid to discovering the values and traditions of the prospective congregations,

their similarities and differences. Would either congregation be willing and able to accept changes to accommodate the values and traditions of the other congregation? What would an amalgamated church look like? What previous and new activities would the amalgamated church support? What would it take to move from saying 'their' church to 'our' church?

The assumption was that because both congregations belonged to the Lutheran Church and each would have its own Sunday worship service there would be no difficulty in coming together as one church with two congregations. However, as one respondent stated, the MLK worship services follow German church traditions as opposed the MCLC North American traditions which are closer to the Anglican and Catholic Church traditions. After the one visit of the MLK congregation to the MCLC Sunday worship service, it was noted in the MLK minutes that the worship service was different, and the inside of the church was dark. No one commented that the worship service was in English. There was no follow-up debriefing after the visit. The MCLC congregation did not attend a Sunday worship service at MLK, although one was offered in English once a month.

The interview results have shown that there was limited effort towards the congregations 'getting to know each other', experiencing each other's worship services, etc. prior to the amalgamation. This reinforces the lack of understanding of senior administrators of organisational change and development. (Curri, 2002) An important first step in creating 'one church with two congregations' would have been to provide greater opportunity for members of both congregations to meet to help people to accept the change. In theory the model of 'one church, two congregations' was accepted by both congregations as it seemed the least challenging option for the members to accept. In reality, it turns out to be more difficult than anticipated to create one church with an amalgamated congregation with two different worship services and two different visions of ministry. Moving forward, it is important that the congregations, the pastor and church council accept that 'Joining Together and Getting to Know You' requires long-term effort and commitment.

In any merger or amalgamation, leadership plays a significant role. (Curri, 1997, 2001; Eastern Synod of the Evangelical Lutheran Church in Canada, 2019) In many Evangelical Canadian Lutheran churches there are various levels of leadership: pastor, council, synod. (Eastern Synod of the Evangelical Lutheran Church in Canada, 2019) The congregation, however, has final decision-making authority in most matters. If, how, and when mergers occur, all three levels play an important role in developing, analysing, and negotiating possible agreements. While these discussions usually take place at the council and synod level, it is critical that the pastor keep the congregation informed, listen to concerns, identify issues, and keep close contact with his/her counterpart. It is essential that the pastor have a deep understanding of the congregation and enjoy its trust and at the same time have the capacity to communicate up and down the decision-making levels.

The data show that in this case, both pastors were highly respected and trusted within their congregations. They have demonstrated their ability to work together at the formal and informal level. This is one of the reasons why the second attempt to join the two churches was accomplished in a very short time. They committed themselves to the task, were creative and flexible in order to achieve the goal of one church, two congregations. They both agreed that it would have been helpful to know more about amalgamation and how challenging it is, especially in the period following the actual merger.

There was also significant effort demanded from the councils in terms of dealing with the legal, financial, accounting, structural, and organizational issues before and after the

merger had taken place. Deciding to share the council presidency between the two members, one from each congregation, was a critical factor in gaining the trust of both congregations. Going forward, keeping the congregation informed, asking for feedback, opening council meetings to congregation members unless personal matters are on the agenda, will be important strategies in building 'one' church. While it has been proven that language is not a barrier to the amalgamation of churches in Canada, it will be a challenge to retain the German language cultural activities in the future.

Although the Eastern Synod of the ELCIC has the highest decision-making authority, its role in this merger process was rather limited. Over the years the synod has gained considerable knowledge about the challenging task of bringing congregations together in order to sustain the Lutheran Church in Canada. (Eastern Synod of the Evangelical Lutheran Church in Canada, 2019) It should be an important resource for assisting congregations when facing a financial crisis, shrinking membership, deteriorating church buildings, or seeking partner churches in order to continue as a Lutheran church. However, it is the pastor and/or church council that much reach out to the synod for support when they identify the need. In addition, the synod could provide teaching support to theological faculties or seminaries for preparing pastors for managing expectations and concerns of congregations during an amalgamation, for deciding whether a proposed partnership meets their needs and hopes and for providing guidance during implementation. Offering seminars to congregations, pastors, council members and theology students on how to successfully merge Lutheran churches in distress could be part of the synod's functions in support of the congregations.

## Conclusion

In conclusion, the purpose of the case study was to highlight the critical importance of understanding and managing the cultures of joining congregations before, during and after a coming together and the important role pastors play in the process. How well pastors, councils and synods understand and apply 'soft' skills of helping congregations to come together and to get to know each other will ultimately decide the future of the church.

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## Appendix 1 - Interview Questions

- 1) What were the triggers for the amalgamation of the two churches?
- 2) What are the similarities, the differences between the two churches?
- 3) From today's perspective:
  - a) What has gone well in the amalgamation/merger of MCLC and MLK?
  - b) What are the most difficult challenges to amalgamate/merge the two churches?
  - c) What were some positive surprises?
  - d) What were some negative surprises?
- 4) Looking back:
  - a) What would you have wanted to know about amalgamation/mergers of organisations before you needed to act?
  - b) What would you do differently, knowing what you know today regarding the amalgamation/merger of the two churches?
- 5) Looking to the future:
  - a) What do you plan to continue the creation of the new Martin Luther Church/Kirche in the short term, in the long term?
- 6) What advice would you give churches that are experiencing financial difficulties or shrinking congregations?