

CHURCH MERGER CHECKLIST

INQUIRY PHASE

- Clerks of Session notify Presbytery's Stated Clerk of informal conversations between two sessions.
- Sessions vote on whether to continue to the Exploration Phase (EP).
- If approved, Sessions call congregational meetings for each church on the same day.
 1. Explain intent and next steps.
 2. Receive nominations for serving on Exploration Committee (EC)
- Each Session identifies up to 5 people to serve on EC
- Clerks of Session send letter to Stated Clerk of Presbytery with names of EC members.
- Council designates representative(s) to participate in process.
- EC contracts with a Consultant to guide EP (approved by Council before incurring costs).

EXPLORATION PHASE

- EC develops three-year strategic mission plan.
- Sessions provide regular opportunities for joint worship and/or social events at both locations.
- EC provides opportunities for dialogue and feedback with both congregations on draft strategic mission plan and process.
- EC recommends to Sessions whether to proceed to the Joining Phase (JP) or dissolve the EC.
- If vote of EC is to proceed, EC schedules a joint Session meeting and sends recommended strategic mission plan to the Sessions.
- At joint Session meeting, elders either vote to proceed to the JP or to dissolve the EC.
- Results of the joint session meeting vote, next steps, and timeline for merger are announced simultaneously to each congregation during Sunday worship.

JOINING PHASE

- Merger Committee (MC) is formed.
- MC presents final strategic mission plan to Council for comment and changes.
- MC prepares Plan of Union, including provisions for:
 - Mission strategy
 - Election of officers
 - Church Buildings, including trust clause
 - Transfer of Removable Assets
 - Pastoral Leadership
 - Financial Review
 - Articles of Incorporation, By-laws, and Manual of Operations
 - Worship
- MC sends draft Plan of Union to Stated Clerk for Council review and comment.
- After review and incorporation of changes from Council, MC recommends Plan of Union to Sessions and provides draft.
- MC requests joint Session meeting
 - Sessions may modify Plan of Union, but both sessions must vote on the same version.
- If Plan of Union is modified by Sessions, new Plan of Union is provided to Stated Clerk for Council review.
- If both sessions approve the Plan of Union, they prepare timeline for congregational voting.
 - Determine date for sending Plan of Union to each congregation
 - Determine date for informational time prior to voting.

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- Call for the congregational meetings which will be held on the same day.
- If both sessions do not approve the Plan of Union, they call congregational meetings on the same day to inform that the process will not continue.
- Plan of Union is voted on by both congregations on the same day, conditioned on Presbytery approval.
- If Plan of Union is approved by both congregations, it is sent to Stated Clerk with a request for it to be placed on Presbytery meeting docket.
 - If either congregation votes not to merge, the process ends.
- Presbytery assembly votes on merger.
- If merger is approved, Stated Clerk reports dissolution of both congregations and creation of new congregation to Office of the General Assembly and Board of Pensions.
- Clerk of Session of new congregation files articles of incorporation and any other state or federal filings for non-profit, tax-exempt status.