

# **CROSSROADS UNITED CHURCH**

## **The Story of the Amalgamation of Queen Street United Church and St. Margaret's United Church**

On January 1, 2010, Queen Street United Church, Kingston and St. Margaret's United Church amalgamated to become Crossroads United Church. This is an account of the process leading to the amalgamation, partly for the records of Crossroads United Church, partly for information that Kingston Presbytery and other congregations may find helpful.

Prepared by Dan Norman, Secretary of the Joint Amalgamation Committee, with the aid of information and comments from the late Steve Brady, Angharad Holmes, Norman Rice, Lesley Kimble, Ann Lablans. Much of the report was prepared in early 2010 but other matters delayed concluding the report until early 2011. This has allowed brief reporting on the first year of our amalgamated life. It is hoped this account may be useful to others considering or dealing with amalgamation. The Status and Role of incumbent ministers during an amalgamation process became a major and time-consuming issue in our process, and this report includes **recommendations** (in the sections on **MINISTERS**) that Presbytery (or the wider church) provide clear written guidance to congregations on this issue. Also, there is a **recommendation** (in “**A Proposed Timeline...**”) that Presbytery provide guidelines on steps required in an amalgamation process since this also caused some problems.

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## **Queen Street considers Amalgamation**

In 2006, Queen Street United Church was in its 143<sup>rd</sup> year at the corner of Queen and Clergy Streets in downtown Kingston. Its building had twice been struck by fire, rebuilt and rededicated in 1887 and 1920; in the 1920 fire the walls and tower were left standing. Founded as a Methodist mission church, Queen Street continued that tradition and, in many respects a typical United Church congregation, served street people and others disadvantaged in the downtown core of modern Kingston. Its concern for outreach included strong support of the Mission and Service Fund.

The congregation had been blessed with significant financial assets, thanks to bequests. By 2006, however, the congregation was, like most United Churches, experiencing some decline in membership and running operating deficits that were significantly reducing its capital. The large building was also a drain on financial resources and human energy: within the past decade, \$400,000 had been spent, with considerable fundraising, to restore the structure of the tower, and now further major building repairs were required. During 2007 the congregation began to explore the possibility of paying for the repairs by selling some of its houses on its large lot. In October 2007 the congregation voted by a large majority to sell all four houses it owned (on the same block of real estate as the church) to pay for repairs. In November, Kingston Presbytery approved the plan to sell but suggested options other than building repairs be considered. Some members of the congregation also questioned whether spending so much on building repairs was good stewardship and a Special Congregational Meeting in December voted to establish a Visioning Committee on options for the congregation.

The options included:

1. Repairing the fabric of the building and continuing and revising the life of the congregation. This would have required significant fundraising, financial capital, and human energy, leaving less to cover deficits and maintain the congregation's mission.
2. Selling the property (the church building and four houses) and using the proceeds to re-establish the congregation in another building. Problems would have included finding an appropriate building to purchase or the prohibitive cost – both in finances and in human energy to find a site and build a new one.
3. Moving to the building of Kingscourt United Church which had recently closed. The building was available at no cost but was some distance from the downtown location of Queen Street.
4. Amalgamation with another United Church. The natural partners for Queen Street might seem to have been other historic downtown congregations Chalmers U.C. and Sydenham Street U.C., with whom Queen Street had enjoyed a long tri-church association for summer worship. Both would have welcomed the Queen Street congregation but neither was interested in giving up its identity in an amalgamation.

At the Annual Congregational Meeting of March 2008, there was an initial report on these options. By this time, the congregation was worshipping in the Hall in the basement to save heating costs, but early in April, part of the sanctuary ceiling fell in and the sanctuary was declared unsafe for worship. In May, 2008 the congregation approved the exploration of amalgamation with St. Margaret's. The expenditure of so much money on repairs and so much congregational energy in considering repairs and fundraising were significant factors in this decision, with concerns about good stewardship..

## **St. Margaret's Situation**

St. Margaret's was founded in 1954 on what was then the western fringe of the city of Kingston, about 3km from downtown. Population had already leapt over correctional services land into Kingston Township to the west. After amalgamation of municipalities in 1998, St. Margaret's is now considered

fairly central in the city. St. Margaret's too had lost its first building by fire, and a new mostly accessible and fire-safe building was dedicated in 1963. The building is in generally good repair and is unlikely to require huge maintenance expenditures (a concern to Queen Street members).

It had been created to serve post-war housing filled with young families, and at one time in the 1960's had 400 children registered for Sunday School. (Queen Street also had a very large Sunday School at that time – a boom era for the United Church.) Over the years, St. Margaret's had engaged in various activities in support of the disadvantaged in the north end of Kingston. It also maintained an operating budget item for support of local agencies including the Theological College and Ryandale Shelter. It also had a strong record of support for the M&S Fund. By 2008, however, the neighbouring population aged and changed and seniors moved into apartments near the church. Thus St. Margaret's membership was disproportionately senior (Queen Street had a somewhat more varied age profile), and declining in number. “Meeting budget” became an increasing concern and there were fewer people of an age willing and able to take on major responsibilities. The lay leadership had recognized for some years that amalgamation would be necessary but it wasn't obvious who might be a good partner and no actual steps were taken.

### **Beginning Steps**

As a step in exploring amalgamation, in February 2008, Queen Street's minister, the Reverend Laurie McKnight-Walker, spoke over coffee with the Reverend David Iverson, the minister of St. Margaret's (who was planning to retire in June 2008). Mr. Iverson reported this inquiry to the Chair of St. Margaret's Church Council. On March 2, four lay member of St. Margaret's Council met with four from Queen Street to discuss the idea. St. Margaret's people indicated that they understood amalgamation to be the formation of a new congregation uniting the two congregations, with a new name rather than the absorption of one into the other. Given the problems with Queen Street's building, it was thought that an amalgamated congregation would worship in St. Margaret's building. The Queen Street group was encouraged by this attitude and agreed to include it as an option in the list of possible future directions for Queen Street. Both groups agreed to take the matter to their congregations.

St. Margaret's Official Board met on March 25, and, itself favouring amalgamation, decided to present the possibility of amalgamation to the congregation. At a Special Congregational Meeting on April 13, 2008, St. Margaret's voted very positively to continue exploring amalgamation with Queen Street. It also appointed a Visioning Task Force to see what members regarded as important to maintain, and what members hoped for in an amalgamated congregation. Queen Street also continued to engage in its visioning. After discussion of options at a congregational Workshop on April 26, Queen Street voted on May 4 to explore amalgamation with St. Margaret's. On June 15, 2008 a Special Congregational Meeting at Queen Street asked Kingston Presbytery for permission to sell all of the church property, to invest the proceeds in trust and to present to Presbytery a plan for the allocation of the proceeds, and this request was approved. The decision to sell the church building itself was a painful one for many in the congregation.

After some Task Force preparation, St. Margaret's conducted its congregational visioning as part of the Annual General Meeting (non-financial) on May 25. The visioning session indicated that people highly valued “welcoming, feeling of family, caring; commitment to outreach; music and worship; leadership; commitment to youth, social activity”. Current priorities were felt to be “fundraising; outreach; music; fellowship”. Future priorities should include things already valued, but also “spiritual growth; maintaining lay participation in worship”. Priorities for a possible amalgamation included things already valued and “building one community; an equal partnership; clear communication between congregation and planners; possibly a new project”. Hopes included more diversity, less

concern with fundraising and more energy to do things in the community, more people to share tasks.

Queen Street's visioning produced quite similar results: worship and music, outreach into community, spiritual growth, with the added issue of less time, energy and money spend on building concerns.

On May 22, approximately eight people each from Queen Street and St. Margaret's travelled to Belleville, along with Presbytery representative Rev. Dr. George Lavery, to meet with the Rev. Bill Smith,. He had himself taken part in the amalgamation of two United Church congregations and had studied and written a dissertation on church amalgamations. He offered much helpful advice on the important factors in success or failure of amalgamations. Some members of the two congregations adjourned to Tim Horton's before returning to Kingston, and this was useful in creating understanding and good will.

The two Church Councils each appointed nine members to a Joint Amalgamation Committee (JAC) and Kingston Presbytery appointed two representatives, George Lavery and Lynn Freeman. Steve Brady of Queen Street and Norman Rice of St. Margaret's became Co-chairs of the JAC. The committee met for the first time on Sunday evening, June 8 at St. Margaret's. (St. Margaret's location, parking lot and availability made it the venue for all JAC meetings.) Sunday evenings were chosen as the best times for meetings. At the first meetings of the JAC, Rev. Laurie McKnight-Walker, Minister of Queen Street United Church, and Ms. Debbie McCutcheon, Designated Lay Minister at St. Margaret's, attended. (The Rev. David Iverson was about to retire.) With such a large group, inevitably at every meeting some members were unable to attend but at all meetings both congregations were well represented. In any event, it was clear that major decisions would have to be acceptable to a majority in each congregation, and decisions were generally reached by consensus, though sometimes recorded by motions. The JAC met 15 times in 18 months, with some changes in personnel after the first 12 months.

The first meeting on June 8 began with introductory prayer and remarks from the Co-chairs and remarks from George Lavery. Norman Rice then presented a summary of Bill Smith's advice, along with a summary of parts of the dissertation. Steve Brady stated that amalgamation would take at least a year, there were many things to be worked out, and that there was no point trying at this stage to set firm dates. And indeed there were a considerable variety of issues to be addressed, some practical, some dealing with personnel, some about worship and spiritual life, some with promoting mutual knowledge and fellowship.

Some of the issues that arose will be described as they developed, but there was one broad issue, which was at times troubling to the process.

## **MINISTERS: STATUS AND ROLE OF MINISTERS IN THE AMALGAMATION PROCESS**

### **Appointment of a Supply Minister at St. Margaret's**

The Rev. David Iverson, minister of St. Margaret's, retired in June, 2008. Presbytery had approved a Joint Needs Assessment and a Joint Search for a successor was under way, with a short list established by June 2008. Presbytery advised that the search must be suspended because of the amalgamation discussions and instead St. Margaret's should seek the appointment of a Supply Minister. There was a general understanding that each congregation should have its own minister through the amalgamation process. St. Margaret's asked its Search Committee members to seek a Supply Minister. Some of the short-listed candidates were asked if they were interested. In due course, towards the end of August, St. Margaret's requested that Kingston Presbytery appoint the Rev. Nadene Grieve-Deslippe as Supply Minister. She was then a Supply Minister at a congregation in Belleville Presbytery with an

appointment to the end of December, but that congregation and Belleville Presbytery had agreed that she could leave to take up the St. Margaret's appointment at the end of November, 2008. Unfortunately the process was delayed by some mishandling of paperwork in September and the lack of a Kingston Presbytery quorum in October so the official approval only took place in November.

The problem was compounded when Presbytery Pastoral Relations Committee was unsettled by a concern raised about the appointment and made it a condition that a mediated process was required to ensure that Rev. McKnight-Walker and Rev. Grieve-Deslippe could work effectively together. However Presbytery was unable to ever make this process occur and the ministers and congregations found their own ways to work together.

The uncertainties around this appointment were very unfortunate. They created unneeded stress for the ministers, the Church Councils and the JAC, they consumed JAC time that could have been better spent, and they diminished the confidence and trust in Kingston Presbytery of some on the JAC and in the two congregations. (It should be emphasized, however, that the JAC greatly appreciated the work and contributions of Presbytery's representatives [Lynn Freeman and George Lavery, and Jim Reynolds who replaced George Lavery in the summer of 2009]. Also, in later stages of the process, Presbytery, its Executive, and its Pastoral Relations Committee were very helpful and prompt.)

### **Status of Ministers in an Amalgamating Congregation**

From the beginning, perhaps based on the conversation with Rev. Bill Smith, and confirmed by our understanding of comments by Rev. George Lavery, members of the JAC understood that in the event of amalgamation, incumbent called ministers would leave (be terminated, without cause?) and that the new congregation would proceed through Joint Needs Assessment and Joint Search to call its own ministerial staff. This view was supported by a clear statement in an Ottawa Presbytery document on amalgamation. (Of course, the problem did not arise in the same way for appointed ministerial staff whose appointments are made with a stated term.)

Members of the JAC communicated this understanding to the congregations over the next months, and became an issue of much concern to some members of both congregations because of their attachments and perhaps because of a sense of unfairness at the possible termination.

This understanding was clearly implicit in a document the JAC sent to Presbytery ("A Proposed Timetable of Work and Decision") in April 2009. Presbytery Executive responded with concerns (discussed later in this story) about this proposal on May 7 but did not directly refer to the issue of the status of the called minister.

Uncertainty over this issue continued, however, particularly over an end date for the called minister at Queen Street and the possible effective date of an amalgamation. At its meeting of July 26, 2009 the JAC asked Lynn Freeman to obtain a clear statement on this issue. Rev. Bob Fillier, Co-Chair of Kingston Presbytery Pastoral Relations Committee replied in September, 2009. The important points are as follows (some explanation justifying the conclusions was given in terms of the Manual of the United Church of Canada):

- The called position of Rev. Laurie McKnight-Walker "rolls over into the new [amalgamated] congregation."
- The appointments of Rev. Nadene Grieve-Deslippe and Designated Lay Minister Debbie McCutcheon were made until June 30, 2010 [and after amalgamation become Crossroads appointments until that date] and terminate on that date unless they are appointed again by Presbytery.
- "However ... the wisdom is such that it is very helpful and beneficial for the newly

amalgamated congregation to select its own ministry personnel.”...To achieve this either “the current ministry personnel requests a change in pastoral relationship – effectively resigning ...” or [Manual 46.1] “at a duly called ...meeting of the pastoral charge the call is ended without cause.”

The JAC accepted that it must abide by this decision but Presbytery might wish to consider some questions that were raised. (1) What would happen if two congregations decided to amalgamate, each with a called minister, but the amalgamated congregation could only afford one position? (2) How would “ending without cause” comply with employment standards legislation? (3) How come Ottawa Presbytery has a different policy? [Partial answer: There is no clear national policy and other Presbyteries are not bound by Ottawa's policy.]

In the end, this problem disappeared for the amalgamated congregation when Rev. McKnight-Walker accepted a call to St. Paul's-Eastern United Church in Ottawa in November 2009. With amalgamation approved to take effect on January 1, 2010, the appointments of Rev. Grieve-Deslippe and Ms. McCutcheon became Crossroads appointments until June 30, 2010.

### **Recommendation to Kingston Presbytery**

*That Kingston Presbytery (or General Council) be prepared to give to congregations considering amalgamation early clear advice and instruction, with a written policy, concerning the status of called and appointed ministerial staff in the event of an amalgamation.*

### **Role of Ministers in Amalgamation Discussions**

The Joint Amalgamation Committee understood, as advised by George Lavery, that amalgamation was a “congregation driven” process. It was therefore decided at the second meeting of the JAC on July 13, 2008 that the ministerial staff would not be invited to meetings of the JAC unless their input was requested on particular issues. They would receive minutes of the meeting (which were going to be posted publicly in the church), and they might be requested to participate in discussions on particular issues.

The issue arose again a year later in a sub-committee established to create a Statement of Purpose and Mission for the amalgamated congregation. At that time, it was still the general understanding in the JAC that incumbent called and appointed ministers might be interested in applying for the ministry positions in the amalgamated congregation (though we had received by then Presbytery's “wisdom ... that it is very helpful and beneficial for the newly amalgamated congregation to select its own ministry personnel”). It was felt that they should not be in a position to define Purpose and Mission to fit their own skills and interests, thus giving them an advantage in the subsequent search. This was not a reflection on the individuals concerned but rather a recognition that people should not be in a position of possible conflict of interest. This issue could arise even where it is clear that an incumbent called minister may “roll over” into the amalgamated congregation but the amalgamating congregations wish to redefine the Purpose and Mission of the new congregation. On the other hand, there was some concern about excluding ministers from discussions where their knowledge and wisdom could be valuable. The committee did not include the ministers in the preparation of the Statement.

### **Recommendation to Kingston Presbytery**

*That Kingston Presbytery give guidance on the issue of incumbent ministers participating in amalgamation discussions that may affect their possible role in the amalgamated congregation should amalgamation occur.*

## **Resuming the Narrative of the Amalgamation Process**

The first JAC meeting on June 8, 2008 included a significant review of events to date and thoughts about the tasks ahead. It was clear it would take many months and at this early date it was fruitless to speculate on timelines. There were many areas to cover and some of this first meeting was devoted to these. However, eventually, working groups were set up to deal with these and to bring recommendations to the JAC. In most cases, these groups consisted of the members of the corresponding committees in the two congregations (or a subset of these committee members).

Worship: Because Queen Street sanctuary was unusable, and Queen Street was likely to decide on June 15 to ask for permission to sell all their land and buildings, it was clear that worship should be joint and located in St. Margaret's building. The initial inclination was to do this as soon as feasible and a date in September was tentatively agreed, with Queen Street being asked to decide if this was appropriate. In subsequent meetings, Queen Street decided it wished to have several more services in the old building, including a 144<sup>th</sup> Anniversary service in November. Eventually, the first joint worship was on November 23. There was some concern because Rev. Grieve-Deslippe would arrive for her first service as Supply Minister of St. Margaret's on November 30, but it was decided that this was not a problem.

Several members of Queen Street attended worship at St. Margaret's during the summer months (while Queen Street took part in tri-church services with other congregations downtown and St. Margaret's continued its worship right through the summer.) This began the desired “getting to know you” that promoted positive feelings about amalgamation.

The fact that Queen Street sanctuary was unusable and that the congregation had decided to sell the building took off the table one issue that may be harder to resolve in other amalgamation discussions. Also very important, joint worship in one fixed site helped members of both congregations become more comfortable with each other and with the idea of amalgamation. However, this also raised concerns about “ownership” by the joint congregation of what had been the church home solely of St. Margaret's. It is worth noting that a few Queen Street members believed that the best approach would be to sell both churches and build a new church. This approach did not gain many supporters and was never really officially considered in our context. – the difficulties and effort and time involved seemed unnecessary and a substantial drain on a mostly ageing congregation. This may have contributed to the loss of some Queen Street members.

The Worship subcommittee (actually the combined congregational worship committees) began more intense discussions in September to reconcile minor differences in the orders of service and in other worship practices. All ministry personnel were fully engaged in the work of this committee. The committees continued as a joint committee for dealing with worship right through to amalgamation and beyond until new Crossroads committees were formed. The occasional grumbles from members of both congregations made it clear that even minor changes in details of the worship service needed to be dealt with carefully during the amalgamation process.

Youth Worship/Sunday School: Each congregation had its own program and personnel to run their respective programs. They met and worked together but eventually settled on a system of alternating responsibility for the children. Children attended adult worship until the children's time and then left for their own program.

Ministry & Personnel: It was recognized immediately that this was a sensitive issue. Indeed, throughout the process, some members of both congregations expressed concerns about the future employment of ministers and other staff – both in terms of fairness and in terms of their support for individuals. Until amalgamation each congregation's M&P committee had obligations to its own

employees, but clearly some shared discussion and understanding was required. The question of ministry is discussed above. Both congregations had capable and well-liked organist/music directors and secretaries. Both would continue to employ these people until amalgamation and Crossroads plans to retain them all with some revision of times and duties. Both congregations had janitorial work done on a contract basis, and it was understood from the outset that when Queen Street handed over its property to a buyer, the Queen Street contract would end and due notice was given. Due to the challenging and sensitive nature of ministry and personnel issues during the amalgamation process it was imperative that a strong and capable Ministry and Personnel Committee was available. Much of this work was handled outside formal committee structure. Also the M&P Committee was instrumental in consolidating differing job descriptions and work structure/expectations.

Music: The organist/choir directors from the two congregation met with the joint Worship Committee and then began jointly to plan the music for worship. They alternated Sundays playing preludes, offertory and postludes on the organ and both organ and piano were played to support the singing of most hymns. One accompanies anthems, the other conducts. Each congregation had a choir of about 10 with an imbalance of voices but when put together the joint choir fortunately had four fairly balanced parts. Except for the summer, this joint choir has sung every Sunday since joint worship began and the congregation has indicated great satisfaction with the fuller, livelier sound. More generally, the congregation seems pleased with all the music, including regular volunteer clarinet support for hymns and anthems and one Sunday a month with music also provided by guitars.

Fellowship: It was recognized from the outset that good fellowship events were needed to promote the unifying of the new congregation. For several months, each congregation continued with its own events (mostly suppers) with some crossover of helpers and attenders. As the process continued, more events became truly events of the amalgamating congregations.

Finance: During the amalgamation process, issues such as how and where each congregation would count collections, what visitors' envelopes should say, and how loose collection should be divided were simply resolved. Queen Street offered to pay for any building costs directly attributed to joint use of the building (such as some additional heating, an additional phone line, and installation of the Queen Street dishwasher in St. Margaret's) but not for routine operating costs until Laurie McKnight-Walker left in November 2009. With her departure, (and with amalgamation approved) Nadene Grieve-Deslippe agreed to be the supply minister to the joint (soon to be amalgamated) congregation, and Queen Street shared her salary costs for the last month. The two Finance Committees joined to form the Finance Committee of Crossroads.

Outreach: Outreach. This is an area where the congregations had very compatible visions. As noted earlier, both congregations were committed to outreach in the community in various ways and both were strong supporters of the Mission and Service Fund. Both made grants to Queen's Theological College, Ryandale Shelter and other organizations. Both congregations made space available for some social organizations at no cost or low cost for activities and fundraisers. Both congregations sent food and sometimes money to Food Banks. Both congregations had Benevolent Funds that could be used to assist occasional crisis requests for such things as rent support or bus fare for someone to visit family in a nearby city. Queen Street focused on its downtown neighbourhood and used Benevolent giving to provide tickets for inexpensive meals at Martha's Table and modest food vouchers for those in need. Over the decades, St. Margaret's supported initiatives in north Kingston, particularly at St. Matthew's United Church.

Queens Street also ran a free neighbourhood breakfast on the last Sunday of each month. With the move from downtown, attendance dropped sharply. Also, some volunteers chose not to continue with the amalgamation so the program was dropped. ( An attempt to revive it in Sydenham Street United

Church's building late in 2010 was unsuccessful.)

During the amalgamation process, the two committees did meet and discuss and did help each other but really operated independently until amalgamation. Crossroads expects to continue the commitments to outreach and mission of the two founding congregations.

Property: People at Queen Street remained occupied with issues of their own property and the issues around the sale of property and disposal of movable property. As discussions continued, they did ask for information about the state of St. Margaret's building as they didn't want to move to a situation where building problems and related fundraising would be major issues. St. Margaret's roof was replaced in 2002 and the heating system was overhauled in 2004 with two new high-quality boilers. There was a need for ongoing repairs and improvements elsewhere but nothing that would provoke a crisis or major fundraising.

### **Major Steps in Early 2009**

Communication to the people of both congregations was clearly essential as the process developed, and was frequently discussed in the JAC. The JAC distributed an "Amalgamation Update" in February and "Frequently Asked Questions" (with answers) in March. It was also felt that in early March it would be valuable for each congregation to hold its own congregational discussion meeting so that people could more freely express and discuss their concerns and their priorities for congregational life and their hopes about amalgamation. These meetings would be a preparation for a joint congregational meeting to discuss the issues together. The separate congregational meetings took place on March 8 and the hopes expressed were very similar: both felt worship, music, spiritual renewal and growth, community, welcoming and mutual support, and outreach were important and both hoped that if there was to be amalgamation it would lead to real coming together as one body, openness to change, and renewed vigour.

The joint meeting started with a brown bag lunch on March 29 following worship. Table groups, each with a mix of people from the two congregations, were led by a member of the JAC through a prepared agenda covering themes and topics raised in the separate meetings. These JAC facilitators had met first for breakfast to prepare for the discussion. When the table group discussions were completed, the facilitators took turns stating to the whole meeting valued qualities and hopes raised in their discussions – but they could only make one statement on each theme until all tables had made their statements after which they could make a second statement. When a theme was exhausted, we moved on to another theme and repeated the process. (This allowed each table group to contribute on each theme rather than have the first reporter make several statements and leave other tables with nothing new to contribute.) A rather imprecise voting took place to try to assign priorities to themes. The meeting was marked by much goodwill and good humour. Some written responses were also collected. The results essentially confirmed the priorities and hopes named at the congregational meetings. A summary of the results of the discussion was presented to the joint congregational worship in April.

### **A Proposed Timeline – Presbytery's Response**

By March 2009, the JAC was optimistic that both congregations were likely to choose amalgamation and decided that we should ask Kingston Presbytery to confirm a timeline proposed by the JAC. The proposal (made to Presbytery in April) hoped to hold decisive amalgamation votes in each congregation on May 31, 2009. Some other important tasks (choice of congregational name, governance model, purpose and mission statement) were to be accomplished in the Fall. The goal was

to achieve amalgamation so that we could appoint a Joint Needs Assessment Committee in June, have the Assessment report approved by January 2010, establish a Joint Search Committee in January, and call a minister for July 1, 2010.

*“A Report to the People and Staff of Queen St. & St. Margaret's United Churches from Kingston Presbytery Executive”* dated May 7, 2009, indicated that the proposed timeline was not acceptable. While the Executive hoped that “you [Queen Street and St. Margaret's] are able to move the amalgamation forward...”, they expressed concerns. Specifically:

1. It was premature to hold “final” congregational votes on amalgamation.
2. Before voting on amalgamation, a name must be chosen for the amalgamated congregation, and vision and mission must be made clear.
3. A JNAC can only be established for a single existing congregation and therefore cannot be established until the amalgamation has actually been approved and realized.

Curiously, no requirement was stated for determining a governance structure, and no mention was made at this time of Presbytery's (later expressed) opinion that the incumbent called minister “rolled over” to the amalgamated congregation, so no JNAC could have been established until that issue had been resolved (see earlier discussion). It would have been very helpful to the JAC (and saved time) if it had known Presbytery's requirements and expectations much sooner in the process.

### **Recommendation to Kingston Presbytery**

*That Presbytery (or some higher court of the church) provide a document clearly stating requirements that congregations must meet before requesting approval of an amalgamation. It would be useful if this document also gave suggestions for effective ways to proceed with amalgamation discussions. (See Appendix 4).*

The Executive's Report did encourage the two congregations to have Congregational Meetings on May 31 to determine whether the congregations were still committed to trying to achieve amalgamation. The JAC was temporarily discouraged by this response, but accepted that it could not proceed without Presbytery's blessing and cooperation, so it proceeded with the May 31 meetings, recommending that:

**Queen Street United Church (St. Margaret's United Church), called to God's purpose, commits to undertake with St. Margaret's United Church (Queen Street United Church) the next steps, including developing a vision, mission and a new name, for an amalgamated congregation.**

After some joint discussion, the congregations separated for the vote. St. Margaret's voted decisively in favour with only a handful of negative votes. The vote was closer for Queen Street, which had decided that important decisions should be made by a 2/3 majority: 71% voted in favour of the motion. With hindsight, one speculates that some of the dissenters chose to go elsewhere at this point in the process.

A second motion at both meetings was to disband the existing Joint Amalgamation Committee and reconstitute it with some continuing and some new members. Phill Purchase succeeded Steve Brady as one co-chair while Norman Rice continued as the other co-chair. It was important for the amalgamation process both before and after this renewal, that JAC members did not hesitate to raise concerns vigorously but always did so with good will and confidence that all were listening and speaking in good faith.

## **Name; Purpose and Mission; Governance**

The renewed JAC met on June 14, 2009 and established one subcommittee to determine a process for selecting a name for the amalgamated congregation, a second to draft a statement of vision and mission, and a third to propose a model of governance. The goal was to bring these matters for decision at a congregational meeting in September to prepare for a final amalgamation vote on November 1 in order to have the decision approved by Presbytery in November.

The subcommittees worked diligently over the summer and brought first drafts to a JAC meeting on July 26. Since both congregations had worked with a Council and Committee structure, governance was fairly easily resolved with a Council with committees (one of the models allowed by the Manual). The “Naming Committee” presented a process for inviting suggested names from the congregation. After some discussion, it was agreed that these should be in writing (or sent by computer) with the proposer's name and a rationale for the name. Any person was allowed to suggest more than one name. The subcommittee would judge these partly by the rationale, partly if a name was suggested by more than one person. It would present a shortlist to a congregational meeting for a vote.

To avoid controversy over the appropriate character of a “vision” statement, that subcommittee presented a draft Purpose and Mission Statement. After some discussion, the subcommittee was asked to consider some of the questions and suggestions raised.

At the same meeting, the joint Finance committee presented a “Theoretical Budget”, based on information about current staff costs as well as property and maintenance costs at St. Margaret's. The budget was optimistic about the financial viability of the new congregation.

During August, the Naming, Purpose and Mission, and Governance Subcommittees made revisions to their proposals and brought them to the JAC at a meeting on August 30. They were asked to consider very minor revisions and to present their proposals at a congregational meeting on October 4. Presbytery was to be asked if these matters could be decided at a joint meeting of the two congregations and Presbytery responded that this would be acceptable. The recommendations on Purpose and Mission and on Governance were approved. On the Name for the congregation, a sequence of votes gradually whittled down the number of possibilities. Ties on two votes meant that four votes were needed to settle on the name Crossroads United Church. Presbytery approved the congregations decisions at its October meeting. (The Purpose and Mission statement is attached to this account as an Appendix.)

## **Sale of the Queen Street Property and Use of the Proceeds**

The Queen Street property, consisting of the Church building itself and four houses all on one large lot, was up for sale by the middle of 2008. An early unsatisfactory offer was declined but eventually, in 2009, a better offer was received. After some negotiations and revisions of the offer and counter-offer, an agreement was reached and concluded in November, 2009. As part of the process, Queen Street obtained severances so that the houses and the church were on separate properties, a requirement for the purchaser to obtain financing for the purchase. As part of the final deal, Queen Street took back a \$250,000 mortgage for the church property and agreed to rent the building for two years from the date of sale in November at a modest rent. It would recoup some of the cost of renting and maintaining the building by subletting space to a Montessori school that had been a tenant for some years. (Subsequently, in mid-2010 the purchaser found it advantageous to pay off the mortgage, to enter into a direct agreement with the school, and to modify the rental agreement to relieve Crossroads of the costs but allow use the former sanctuary until June 2011 for storage until stained glass windows and the organ could be properly removed.)

As part of the process of preparing for the sale, Queen Street congregation established a committee to recommend use of the proceeds of the sale. Allocations recommended were approved by the Queen Street congregation on November 1 and subsequently by Kingston Presbytery. Allocations included:

- \$200,000 to establish a Queen Street United & St. Margaret's United bursary fund at Queen's Theological College (now Queen's School of Religion);
- \$100,000 for use by Kingston Presbytery to continue Queen Street's outreach (the project subject to approval by Crossroads' Council);
- \$200,000 to realize the Purpose and Mission of Crossroads United Church;
- \$250,000 to be held as a Manse Fund (additional to \$68,000 in St. Margaret's Manse Fund);
- \$100,000 for building improvements at the amalgamated church.

In addition, funds were set aside to provide for costs of the sale (real estate, lawyers, etc.), costs of moving, other costs of amalgamation including costs of some building improvements at the St. Margaret's building. (Note: Queen Street also already had \$300,000 in unrestricted funds which were transferred to Crossroads.)

### **Final Decision**

With name, purpose and mission, and governance settled and approved by Presbytery, it was time for congregational meetings to finally decide whether to amalgamate. It was originally hoped that these could occur in October but it was found that November 8 was the earliest practicable date. Originally the proposed date of amalgamation was January 31, 2010 because it was felt that some financial issues at Queen Street would need time to resolve. However, these were resolved more quickly and the date was changed to January 1, 2010, following General Council Office's advice that dealing with the Canada Revenue Agency would be much simpler with that date.

Following worship on November 8, there was a joint congregational discussion of the issues, at which some continuing feeling of loss of the old church names was expressed by a few and responded to by others. There was also some clarification of practical issues. As required by Presbytery, St. Margaret's congregation retired to the church hall to meet with Presbytery representative Lynn Freeman as chair, and Queen Street congregation met in the sanctuary with Presbytery representative Jim Reynolds as chair. The motion was:

**That [Queen Street United Church / St. Margaret's United Church]request Kingston Presbytery to amalgamate Queen Street and St. Margaret's congregations into a new congregation to be named Crossroads United Church, effective January 1, 2010.**

Both congregations voted in favour, Queen Street 37-0 , and St. Margaret's 48-2. (A number of people who had been present for worship that morning did not stay for the meeting: some were dependent on rides from others, some thought the outcome was certain without their votes, and some were not members on the Historic Roll of either congregation. Those who were opposed to the amalgamation had already absented themselves from joint worship.) A celebration of the decision followed. However, some Queen Street people who were convinced amalgamation was the right choice and were committed to making it work still felt some pain. Some pain was due to finally cutting ties with building that had been the locus of so much of their faith life, some was due to the loss of some long-time church friends who had chosen not to be part of the amalgamated congregation.

The results were reported to Kingston Presbytery Executive and it presented the following motion to Kingston Presbytery on November 17, 2009:

**That Kingston Presbytery amalgamate the Pastoral Charges of Queen Street United Church and St. Margaret's United Church to form Crossroads United Church, effective January 1, 2010, pursuant to Section 334 of The Manual 2007.**

The motion was carried by Presbytery.

### **Arranging Some Details**

- **Interim Committees.** It was agreed by both Church Councils and the Joint Amalgamation Committee that, until Crossroads Committees could be elected at a congregational meeting early in 2010, committees on all the various aspects of church life would be formed by combining the corresponding committees of the two congregations. Moreover chairs of committees would be determined by these *ad hoc* committees themselves. The Council of Crossroads was to consist of all members of the Councils of the two founding congregations and Lesley Kimble (then Chair of St. Margaret's Council) would be Chair until a new chair was elected. (Grant Gilliland, the Chair of Queen Street Council, resigned as he chose not to become part of Crossroads, although he had worked cooperatively and in good faith to ensure that the amalgamation process was carried out fairly and properly.). Presbytery informally approved this interim arrangement which worked well with no discord arising.
- **Joint Needs Assessment.** With Supply Minister and Designated Lay Minister appointments ending June 30, 2010 it was clear that the new congregation required a Joint Needs Assessment. The Joint Council scheduled a Congregational Meeting of Crossroads for January 10 and had a committee prepare a slate of nominees. That meeting duly requested that Kingston Presbytery form a Joint Needs Assessment Committee and elected congregational members to the JNAC. Presbytery Executive and Pastoral Relations, recognizing the need for a JNAC, had already informally begun seeking Presbytery representatives for the committee. In January Presbytery approved the formation of the JNAC with three Presbytery representatives (Lynn Freeman, David Holden, Rev. Terry Deline).
- **Canada Revenue Agency.** We were advised both by General Council Office and by Canada Revenue Agency (CRA) that we should deal with our charitable registration number by having one congregation request CRA to approve a name change to Crossroads effective January 1, 2010 (in our case we chose St. Margaret's since its address and phone number would be used by Crossroads) and having the other congregation (Queen Street) terminate its registration on the same date. To support this change, the Charities Division of CRA required a letter from "head office" (General Council Office) confirming Presbytery's approval of the changes. It took just over three months for the Charities Division of CRA to confirm the change of name (perhaps wanting to see final financial reporting for 2009 from Queen Street and St. Margaret's before approving the change). It was also necessary to notify the Payroll Division of CRA (since we have to ensure that payroll deductions are properly dealt with). We were told (and found) that the two divisions of CRA do not seem to communicate with each other. Since churches are a tiny fraction of Payroll's work, junior staff there had difficulty understanding how we existed and had a "business number" without having articles of incorporation (we are covered as a

“branch” of the United Church of Canada). Having an effective date of amalgamation of January 1 facilitated our dealings with CRA.

- **Banking.** It required some explanation, discussion and a copy of the letter from General Council Office to persuade our bank to open an account in the name of Crossroads to start on January 1, since Crossroads did not exist when these discussions were taking place. We kept both congregations' accounts alive for some time after amalgamation to deposit cheques payable to Queen Street U.C. or to St. Margaret's after December 31, 2009 or to pay late invoices payable by one of the two congregations.

### **Crossroad's First Year – Selected Events and Issues**

We have discovered that the first year has been a busy one, as the new congregation had to carry out all the usual annual tasks and events of a medium sized congregation as well as deal with several issues specific to creating one united congregation from two congregations of generally compatible minds and attitudes but somewhat different policies and traditions.

- **Covenanting Service** The Covenanting Service between Crossroads United Church and Kingston Presbytery took place on Sunday January 31, 2010. Kingston Presbytery Chair Mary Lil Megginson presided over the covenanting and shared with Rev. Nadene Grieve-Deslippe in the Sacrament of Communion. It was also the occasion of a congregational celebration.
- **Emerging Spirit Workshop** Crossroads hosted a one-day Emerging Spirit Workshop on Saturday February 20. It was well attended by Crossroads members, as well as some members of area churches. The general consensus was that it was somewhat disappointing in not giving us ideas for becoming a more effective congregation.
- **First Annual Meeting** At this meeting on March 21, 2010 we elected Ann Lablans as Chair of Church Council and members of the various committees. A budget for 2010 was approved.
- **Reappointment of Supply Minister and Designated Lay Minister** Since it was clear that we could not call new ministerial staff before July 1, 2011, the congregation requested and Kingston Presbytery approved the re-appointment of Rev. Nadene Grieve-Deslippe as Supply Minister and Ms. Debbie McCutcheon as Designated Lay Minister until June 30, 2011.
- **Approval of Joint Needs Assessment and Creation of a Joint Search Committee** A Joint Needs Assessment was approved at a congregational meeting in June and also by Kingston Presbytery in June. The congregation elected its members for a Joint Search Committee and Presbytery appointed its members so the Search Committee could begin in September.
- **Establishing Policies** The two founding congregations had somewhat different policies and processes on various issues. Rev. Nadene Grieve-Deslippe (and others) urged that a policy book (or binder) should be created with written policies or processes on issues such as Weddings, use of the Benevolent Fund, and Congregational Care. Considerable progress has been made but work remains to be done.
- **Building Improvements** The most urgent improvement completed was improving the washrooms and making them truly accessible. Portions of the roof were re-roofed (the 2002 re-roofing having proved defective in some respects). Courtyard windows were substantially improved. This work used up the funds from the sale of Queen Street property allocated to such improvements and future work will use other capital funds and/or money raised for the purpose.
- **Changes** Queen Street had three major stained glass windows, while St. Margaret's had been

designed not to accommodate such windows. One of the Queen Street windows was successfully installed in the Crossroads narthex, and determining a way to install a second in the sanctuary is a high priority of the Council. The fate of the third remains to be determined. A Sanctuary Committee has proposed other changes to the Sanctuary which Council will work on. One goal is to make it more functional, another to make it feel like Crossroads Sanctuary not just St. Margaret's. This work has so far been funded from the Amalgamation Fund created by the Queen Street sale.

- **Fellowship and Fundraising** Both congregations had had fellowship suppers and a bazaar. To varying extents, some of these events were also designed to raise funds for congregational costs as well as promoting community. While the number of events at Crossroads in 2010 was similar to the number in either of the two congregations in recent years, there was some fatigue among organizers of such events also. There is some feeling that more fellowship events are needed.
- **Financial Results for the First Year** Our Operating Expenses for 2010 (excluding some non-recurring items and capital expenses) were \$272,027. Our Revenue was \$268,839, so the deficit realized on these regular recurring items was \$3,188.
- Congregational giving (by envelopes, PAR, two Special Collections, and Extra Gifts but not memorial gifts) at Crossroads in 2010 was \$177,319, much less than the total for Queen Street and St. Margaret's in 2009 which was \$226,290. This decline of 22% is due mostly to the falling away of some members because of the amalgamation, but also due to a number of people moving away (often to seniors' homes) or dying.
- Crossroads sent \$49,959 to the Mission and Service Fund in 2010. Queen Street and St. Margaret's contributions to M&S in 2009 totalled \$52,733. The decline in M&S giving was thus 5.3%.

## APPENDIX 1

### **FACTORS THAT HELPED THE AMALGAMATION PROCESS**

1. Queen Street was faced with the need to make a major decision about its future. The partial failure of the roof and the resultant inability to use the sanctuary made repairs prohibitively expensive and alternatives even more desirable.
2. St. Margaret's recognized the need for it to amalgamate, and was willing to consider a real amalgamation with a new name rather than simply the absorption of another congregation.
3. Because one building needed costly repairs and the other was a good building in fairly good repair, the decision about where an amalgamated congregation would worship and work was simplified.
4. People of both congregations participated in the process with good will and good faith, and shared similar expectations and hopes for the life of a congregation.
5. The ministers worked hard to maintain good will and support the process.
6. The Joint Amalgamation Committee did a good job of keeping the congregations informed – a crucial requirement.
7. The members of the Joint Amalgamation Committee were willing to work hard and meet frequently to keep the process moving. They were supported by very helpful Presbytery representatives to the JAC.
8. While there were some early issues with Kingston Presbytery, in the latter half of 2009 communication between the JAC and Presbytery Executive was excellent and this made it easier to set and keep to a desired timeline.

## APPENDIX 2

### **Members of the Joint Amalgamation Committee**

There were, in effect, two committees, one functioning from June 2008 to June 2009, and a successor with (many members continuing from the earlier committee) from June 2009 to November 2009. Membership on the first will be denoted by ( I ), on the second by ( II ).

**Co-chairs:** Steve Brady ( I ); Grant Gilliland (acting, in Steve's absence Jan – Apr 2009); Norman Rice ( I,II ); Phill Purchase ( II ).

**Presbytery Representatives:** Lynn Freeman ( I,II ); George Lavery ( I ); Jim Reynolds ( II )

**Secretary:** Dan Norman ( I,II )

**Other Members:** Allan Baer ( I,II ); Mark Bee ( I,II ); Margaret Brady ( I ); Hart Cantelon ( I ); Elaine Carr ( II ); Sally Crouch ( I ); Karen Elliott ( I,II ); Grant Gilliland ( I,II ); Jan Hartgerink ( I,II ); Becky Hill (II); Angharad Holmes ( I,II ); Lesley Kimble ( I,II ); Ursula King ( I ); Mary Macdonald ( I ); Anne Mansfield ( II ); Marie Miller ( II ); Doreen Noble ( I,II ); Gerda Paterson ( I ); Kay Purchase ( I ), Phill Purchase ( I,II ); Susan Reid ( II ); Ron Swain ( I,II ); Joan Tompkins ( II ).

**Note:** Bob McKean ( I ) and Linda Roberts ( II ) each attended one meeting but withdrew because they were unable to attend further meetings.

## APPENDIX 3

### **CROSSROADS UNITED CHURCH, KINGSTON, ONTARIO**

#### **Purpose Statement**

*Crossroads United Church, as a congregation of the United Church of Canada, is a welcoming and supportive community of Christians that gathers to worship, seeks spiritual growth and humbly works to advance God's justice in the world.*

#### **Mission Statement**

**Crossroads United Church is a congregation of the United Church of Canada.**

#### **We are a welcoming and supportive community of Christians,**

- Seeking to be kind and caring
- Affirming our own and others' self-worth in authentic relationships
- Providing a place where all people can feel safe and welcome
- Offering opportunities for fellowship

#### **We gather to worship,**

- Celebrating God's presence joyfully
- Engaging all ages intentionally
- Listening for God's wisdom in word, scripture and Christ's teachings
- Praising God through music, prayer and the Sacraments

#### **We seek spiritual growth,**

- Learning through youth worship and Sunday School
- Seeking meaning and understanding through questions, reflection and discussion
- Growing through Bible study and other study groups
- Being open to new opportunities for spiritual development and expression

#### **We humbly work to advance God's justice in the world,**

- Living with respect in God's creation
- Seeking to understand and respond to the needs of others locally and globally
- Sharing ourselves, our time, talent and treasures through outreach initiatives
- Promoting the Mission and Service of the United Church of Canada
- Supporting the peaceful resolution of human conflict

**September 14, 2009**

## APPENDIX 4

### **Suggestions for General Guidelines for Congregations Considering Amalgamation**

It would be desirable for Presbytery (Conference? the national church?) to provide a statement to guide congregations in an amalgamation process. The following is a suggestion of some ideas that might be included in such guidelines. Since pastoral charges vary (rural, urban, small, large, historic, recent, liberal, conservative) the guidelines should mostly be flexible and suggestive rather than detailed and prescriptive. Also, preferably, brief. However the guidelines should clearly state any **requirements** of Presbytery or the wider church. What would appear from Crossroads experience to be **requirements are stated in bold type**.

1. Beginning: an informal meeting of leaders of congregations considering amalgamation with someone from “outside” with experience and knowledge of amalgamations. Start “getting to know you” and understanding expectations.
2. Respective Church Councils must recommend to Congregation Meetings that the congregations continue exploration of amalgamation.
3. Congregational Meetings should be held to obtain approval for continued exploration. Informing and involving the congregation throughout the process is crucial. Newsletter articles and/or pages of “frequently asked questions” are very useful tools for communication of issues and process. Extra Congregational Meetings (possibly brief, after worship) should be held at appropriate stages of the process, to ensure that the congregation is still “on board” with the idea of amalgamation and is having issues discussed openly, in public. Joint congregational meetings are often desirable so all members of congregations understand concerns of each of the two congregations and see that matters are being discussed openly.
4. Congregations should choose members for a Joint Amalgamation Committee (JAC) to discuss issues. **Presbytery will appoint representatives to this JAC** (at least two, to increase chances that at least one is always available for a meeting). A fairly large committee may work best because the task of this committee is to see whether it can find a consensus within each congregation, and if that is accomplished, within the combined congregation. Members must be prepared to meet often and work hard in subcommittees so that the process does not lose momentum. Depending on circumstances, this committee may play a role in discussing (with the cooperation of Councils) issues such as sharing of financial costs, joint worship and fellowship events during the amalgamation process.
5. **Presbytery must advise the JAC and the Church Councils of the Status and Role of Ministers in the Amalgamation Process (see Crossroads Story of the Amalgamation, Section on MINISTERS).**
6. Congregational Visioning Meetings (properly prepared) should be held to determine what is important in each congregation and desired in an amalgamation. Following this within a few weeks with a Joint Congregational Visioning Meeting will help discern whether the congregations are sufficiently of like mind for an amalgamation to have good prospects of success. A Joint meeting can also promote getting to know members of the other congregation. Careful preparation for such meetings is important to create mixing and stimulate honest discussion. It may be appropriate at about this stage to ask each congregation at a Congregational Meeting if they still wish to continue the process.
7. **If the amalgamation will involve the sale of church building, land, and/or disposal of movable assets, Presbytery must require the selling congregation to follow United Church**

- policies and get Presbytery approval for proposed use of the proceeds of the sale.
8. **Presbytery should advise the JAC that the congregations will have to reach agreement on certain issues and gain Presbytery approval of their decisions on these issues before Presbytery will deal with a request to amalgamate the congregations. A Presbytery representative should chair (or at least be present at) meetings to decide the following issues.**
    - **A statement of Vision (or Purpose) and Mission;**
    - **A system of Governance, at least in outline (some details may be left until later);**
    - **A Name for the Amalgamated Congregation;**
  9. **A decision on where the amalgamated congregation will worship and conduct its life and mission.** (This could be a thorny issue and some sensitivity is needed in deciding when to address it. However, it was not an issue for Crossroads JAC, though it may have been for Queen Street United.)
  10. Note that it is not necessary that all of these issues be resolved at one meeting. However, since by this point there will have been several congregational meetings, it is convenient if they can be dealt with at one meeting. Since Vision/Mission, Name and Governance will apply to the amalgamated congregation, it seems wise to have the congregations meet jointly to approve the resolution of these issues should this be feasible. (Kingston Presbytery allowed this in the case of Crossroads.)
  11. When Vision/Mission, Governance, Name, Place of Worship have been approved by Presbytery, the congregations may hold a Congregational Meeting to request that the congregations be amalgamated. It may be useful to start with a Joint Congregational meeting to discuss the question. Then **the two (or more) congregations meet separately (in the Church Hall and the Sanctuary, for example) for Congregational Meetings chaired by representatives of the Presbytery for further discussion and the vote. If the congregations vote in favour of the amalgamation, the result is reported to Presbytery requesting it to amalgamate the congregations. (Should this be reported by an officer of each participating congregation or by the Presbytery representatives chairing the meetings?)**
  12. Once amalgamation is approved by the congregations (and even before approval of the amalgamation by Presbytery) the Joint Amalgamation Committee may recommend to the Councils (or Boards) an interim arrangement for governance and committees to serve until a Congregational Meeting of the amalgamated congregations can elect its members for committees and the Council or Board. At Crossroads, simply combining the respective bodies from the two congregations served satisfactorily. However, legally some functions (e.g. Ministry and Personnel, Finance) remain the responsibility of the participating congregations until the official date of amalgamation, and each congregation must file a final financial statement with Canada Revenue Agency.
  13. **A Joint Needs Assessment Committee cannot be created until the amalgamation has been approved by Presbytery and is officially in place.** It may be desirable, however, to have a JNAC functioning as soon as possible. Once the congregations have approved the amalgamation they may wish to begin preparing for a JNAC by jointly seeking candidates for the committee and making plans for an amalgamated congregational meeting to request the formation of a JNAC. At the same time Presbytery Executive and Pastoral Relations Committee may begin looking for members to appoint to the JNAC once it is clear that the amalgamation will take place.