

Amalgamation Readiness Assessment

A practical tool to help congregational leaders discern where they actually are - not where they wish they were.

How to Use This Assessment

- This is a discernment tool, not a test to pass or fail.
- It works best when completed by multiple leaders (governing body, staff, key lay leaders) and/or congregation.
- Rate each statement based on your current lived reality.
- Differences in scores are often more important than averages.

Rate the statements and then total the value of each set.

Rating Scale:

- 1 = Not true / Not present
- 2 = Mostly untrue / Rarely present
- 3 = Mixed / Inconsistent
- 4 = Mostly true
- 5 = Very true / Consistently present

Sense of Call & Purpose

Reflection question: *What would we say God / the Spirit is inviting us into at this moment?*

Statement	1	2	3	4	5	Total	Average
Our conversation about amalgamation is rooted in Call/Purpose, not just survival.	☐	☐	☐	☐	☐		
We can clearly articulate why we are exploring this now.	☐	☐	☐	☐	☐		
Leaders share a common understanding of what we hope amalgamation could make possible.	☐	☐	☐	☐	☐		
We have named hopes and fears honestly.	☐	☐	☐	☐	☐		

Leadership Capacity & Health

Reflection question: *What additional support would leaders need to take this on sustainably?*

Statement	1	2	3	4	5	Total	Average
Our current leadership is stable enough to hold a complex process.	☐	☐	☐	☐	☐		
Leaders generally trust one another and can disagree respectfully.	☐	☐	☐	☐	☐		
Decision-making processes are clear and followed.	☐	☐	☐	☐	☐		
We have enough energy and resilience to do this work well.	☐	☐	☐	☐	☐		

Congregational Awareness & Engagement

Reflection question: *Who feels heard so far — and who may not?*

Statement	1	2	3	4	5	Total	Average
The congregation understands why amalgamation is being discussed.	☐	☐	☐	☐	☐		
People feel safe asking questions or expressing concern.	☐	☐	☐	☐	☐		
Communication has been open, consistent, and timely.	☐	☐	☐	☐	☐		
Congregational grief and attachment are being acknowledged.	☐	☐	☐	☐	☐		

Relationship with Potential Partner Congregation(s)

Reflection question: *What assumptions are we making about the other congregation(s)?*

Statement	1	2	3	4	5	Total	Average
There is existing trust or goodwill between congregations.	☐	☐	☐	☐	☐		
We have taken time to learn about one another's culture and history.	☐	☐	☐	☐	☐		
Differences have been named honestly.	☐	☐	☐	☐	☐		
We are relating as partners, not as rescuers or competitors.	☐	☐	☐	☐	☐		

Systems, Assets & Practical Realities

Reflection question: *Which practical realities are we avoiding — or underestimating?*

Statement	1	2	3	4	5	Total	Average
We have a clear picture of our financial reality.	☐	☐	☐	☐	☐		
Property issues have been named (even if unresolved).	☐	☐	☐	☐	☐		
Governance and polity requirements are understood.	☐	☐	☐	☐	☐		
We are realistic about the workload involved.	☐	☐	☐	☐	☐		

Emotional & Spiritual Readiness

Reflection question: *What emotions are shaping this conversation right now?*

Statement	1	2	3	4	5	Total	Average
We have acknowledged grief related to change or potential endings.	☐	☐	☐	☐	☐		
There is space for lament as well as hope.	☐	☐	☐	☐	☐		
Leaders are modelling calm, prayerful presence.	☐	☐	☐	☐	☐		
We are attentive to anxiety rather than driven by it.	☐	☐	☐	☐	☐		

Scoring Summary

Average Personal Summary

Take the scores for each section and divide by the number of statements (4) to calculate an average score (1–5). Place average personal score in chart.

Note: For another way to calculate readiness. Use the *Amalgamation Readiness Calculator*. It is an auto filling excel sheet.

Average Group Score

Take the scores from all participant's section totals, add them together per section, and divide by the number of participants. Place average Group score in chart.

Section	Average Personal Score	Average Group Score
Sense of Call & Purpose		
Leadership Capacity & Health		
Congregational Awareness & Engagement		
Relationship with Potential Partner Congregation(s)		
Systems, Assets & Practical Realities		
Emotional & Spiritual Readiness		
Total		
Total Average Score (total / 6)		

Interpreting the Results

4–5 range: Ready for active exploration and decision-making.

2.75-4 range: Early discernment — invest in trust-building and clarity.

1–2.75 range: Pause to focus on leadership health, communication, and pastoral care.

Final Discernment Question

Given where we truly are today, what is the most faithful next step — not the fastest one?