



**ORTHODOX  
CHURCH in  
AMERICA**

**Metropolitan Council Meeting**

**Fall 2016**

**Other Reports**



**Meeting of the Metropolitan Council  
September 19 to September 22, 2016  
Other Reports**

**Table of Contents**

1.	Proposed Agenda	
2.	Minutes from Spring 2016 Meeting	
3.	Current Metropolitan Council List	
4.	19 <sup>th</sup> All American Council Report	Fr. Eric G. Tosi
5.	Survey from 18 <sup>th</sup> All American Council	Fr. Eric G. Tosi
6.	SOCA Review	ADN Joseph Matusiak
7.	Additional Readings on Legal Challenge	Angela Parks, esq.
"		
:	0*****Tgcf lpi u"qp'Ngcf gtuj k *****RF P 'Rgyvt'F cplrej kemiEj ctrgu'Clcrgv'	



## Meeting of the Metropolitan Council September 19 to September 22, 2016

### Metropolitan Council Agenda

All housing, meals and meeting are at Seminary of the Immaculate Conception located at 440 W. Neck Road, Huntington, NY 11743 (about 15 minutes west of the Chancery) Phone: (631)423-0483.

#### Sunday, September 18

##### *Arrival Day*

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
9:00 AM	Divine Liturgy	Chancery	Chancery Staff
All Day	Transport	Airports	Chancery Staff

Transport to and from the airport to the Seminary

#### Monday, September 19

##### *Arrival and Retreat: Protodeacon Peter Danilchick and Charles Ajalat on "Christian Leadership in the Church"*

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
All Day	Transport	Airports	Chancery Staff
8:00 AM	Breakfast	IMC	IMC
9:30 AM	Retreat Session I	IMC	PDN Peter
12:30 PM	Lunch	IMC	IMC
1:30 PM	Retreat Session II	IMC	Charles Ajalat
5:30 PM	Dinner	IMC	IMC
7:00 PM	Reception at IMC		

*Any needed committee meetings can be scheduled for this evening*

**Tuesday, September 20**  
***Metropolitan Council***

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
8:00 AM	Breakfast	IMC	IMC
9:00 AM	Metropolitan Council		
	A. Agenda: Introduction		Fr. John Jillions
	B. Roll Call/Approval of Minutes		Fr. Eric G. Tosi
	C. Welcome - New Members		Metropolitan Tikhon
	D. Metropolitan's Report		Metropolitan Tikhon
	E. Major Goals for Upcoming Year		Metropolitan Tikhon
12:30 PM	Lunch	IMC	IMC
1:30 PM	F. Pension Plan Report - Decision on Retired Clergy Plan		Mary Buletza/Maureen Ahern
	G. Chancellor's Report - ORSMA - SMPAC		Fr. John Jillions Cindy Davis Dr. Al Rossi
	H. Secretary's Report - Planting Grant/Mission School - AAC Recommendation - IT Report - Communications/website redesign Report - Archives Report		Fr Eric G. Tosi     Alex Liberovsky
	I. External Affairs		Fr. Leonid Kishkovsky
	J. Legal Report		Angela Parks, esq.
5:30 PM	Dinner	IMC	IMC
7:00 PM	New Member Orientation		MC Leadership

**Wednesday, September 21**  
***Metropolitan Council***

7:30 AM	Transport to St. Sergius Chapel		Chancery
8:00 AM	Divine Liturgy		Metropolitan Tikhon
9:30 AM	Breakfast	Chancery	Chancery Staff
10:30 AM	Transport to IMC		Chancery
11:00 AM	Metropolitan Council	IMC	
	K.	Stewards of the OCA report	ADN Joseph
	L.	Internal Auditors	John Skrobat
	M.	External Auditors	Tony Pennella
	N.	FOCA Report	Marge Kovach
	O.	Committee Updates	Committee Chairs
12:30 PM	Lunch	IMC	IMC
1:30 PM	Metropolitan Council	IMC	
	P.	Treasurer's Report	Melanie Ringa
	Q.	2017 Budget Presentation	Fr. John Dresko
	R.	Open Discussion	Metropolitan Tikhon
5:30 PM	Dinner	IMC	IMC
7:00 PM	Standing Synod Meeting		

**Thursday, September 22**  
***Metropolitan Council***

8:00 AM	Breakfast	IMC	IMC
9:00 AM	Metropolitan Council	IMC	
	S.	Strategic Planning Session	Metropolitan Tikhon

- T. Open Discussion Metropolitan Tikhon
- U. Other Business/Committee Meeting Issues
- V. Next Meeting and Dates established

12:30 PM Lunch IMC IMC

*Transportation to the airports all day. For those staying for the St. Sergius celebration, they will be moved to the East Norwich Inn until Saturday.*

**Friday, September 23**

*Open*

**Saturday, September 24**

*St. Sergius Day*

9:00 AM Transport to Chancery

10:00 AM Hierarchical Liturgy

Reception follows

*Transportation to the airports after Reception.*



**MINUTES  
of the Joint Meeting of the Standing Synod  
and the 2016 Spring Session of  
the Metropolitan Council**

**Tuesday, February 16 – Thursday, February 18, 2016  
Immaculate Conception Seminary, Huntington, NY**

---

*These draft minutes are subject to approval at a subsequent meeting of the Metropolitan Council*

**PARTICIPANTS**

**STANDING SYNOD**

His Beatitude, Metropolitan Tikhon  
His Eminence, Archbishop Benjamin

His Eminence, Archbishop Michael  
His Grace, Bishop Paul

**METROPOLITAN COUNCIL**

**CHURCH OFFICERS**

Archpriest John Jillions, *Chancellor*  
Melanie Ringa, *Treasurer*

Archpriest Eric Tosi, *Secretary*

**MEMBERS ELECTED BY THE ALL-AMERICAN COUNCIL**

Archpriest Chad Hatfield  
Archpriest Antonio Perdomo  
Archpriest Thomas Moore

Maureen Jury  
Katherine Vitko  
Larry Skvir

**DIOCESAN REPRESENTATIVES**

**Diocese of Alaska**

Archpriest John Dunlop

Patrick Pletnikoff

**Albanian Archdiocese**

Archpriest Joseph Gallick (*except Tuesday morning*)

Donna Dimitri (*except Thursday*)

**Bulgarian Diocese**

Priest Martin Watt

Deacon Esteban Vazquez

**Archdiocese of Canada**

Archpriest Anatoliy Melnyk

Priest Justin Mitchell

**Diocese of Eastern Pennsylvania**

Archpriest Timothy Hojnicky

Susan Schlasta (*except Thursday*)

**Diocese of the Midwest**

Archpriest Alexander Kuchta (*except Thursday*)

Robert Graban (*except Tuesday morning*)

**Diocese of New England**

Archpriest Robert Dick (*except Thursday*)

David Zavednak

**Diocese of New York/New Jersey**

Archpriest John Shimchick

James P. Kornafel

**Diocese of the South**

Priest Joseph Lucas

Angela Parks, Esq. (*except Tuesday*)

**Diocese of Washington**

Priest John Vitko

Elizabeth Mikhalevsky (*except Tuesday*)

**Diocese of the West**

Archpriest John Dresko

Wesley J. Smith, Esq.

**Diocese of Western Pennsylvania**

Priest Nikolai Breckenridge

Dr. John Schultz

**ABSENT**

None

**GUESTS** (*for all sessions unless otherwise indicated*)

Protopresbyter Leonid Kishkovsky (*Director of External Affairs and Interchurch Relations*)

*– Thursday morning*)

Raymond Boyd (*Stewardship Assistant - Wednesday morning*)

Judge E.R. Lanier (*OCA General Counsel – except Thursday*)

Alexis Liberovsky (*recording secretary*)

**TUESDAY, FEBRUARY 16, 2016**

Metropolitan Tikhon celebrated a prayer service at 9:08 AM on Tuesday morning to open the meeting at the Immaculate Conception Seminary.

**A. Agenda: Introduction (attached)**

The meeting was then called to order. Regarding the meeting’s agenda, Fr. Eric Tosi announced that Cindy Heise and Dr. Albert Rossi would not be present to deliver reports and, therefore, the ORSMA and SMPAC reports would be presented as part of the Chancellor’s report. He also informed the meeting that Fr. Leonid Kishkovsky would likely deliver his External Affairs report this afternoon. He added that there would likely be a brief report on the Pension Plan on Thursday, although Ted Bazil would not be presenting it, as indicated in the agenda. Fr. Tosi then requested a motion to approve these changes to the agenda.

**A.1. MOTION KUCHTA/ZAVEDNAK – To approve the agenda for this meeting as amended. CARRIED.**

**B. Roll Call/Approval of Minutes of Previous Meeting (attached)**

Fr. Tosi then conducted the roll call and announced guests who would be present at various points during this meeting (see participants list). Fr. Justin Mitchell was congratulated on his ordination to the priesthood just a few days before this meeting. Fr. Tosi requested approval of Alexis Liberovsky as recording secretary for the



meeting, which was accepted without objection. He presented the draft minutes of the previous meeting of the Metropolitan Council on September 22-24, 2015 for approval.

**B.1. MOTION FR. J. VITKO/DICK -- To accept the previous meeting minutes of September 22-24, 2015 as presented. CARRIED.**

**C. Metropolitan's Report**

Metropolitan Tikhon welcomed everyone to the meeting, particularly the new members of the Standing Synod and the Metropolitan Council. He presented his wide-ranging report on his own ministry along with other significant activities in the OCA, categorizing them in the context of the following four pillars of the Guiding Framework for the Orthodox Church in America entitled "*The Apostolic Work of the Church*", which he has been preparing:

- I – The Spiritual Life
- II – Stewardship
- III - Evangelism and Outreach
- IV – External Relations: Long-Term Goals

He stressed that the fundamental reason we are here as the Church is to provide all of mankind with the possibility of entering the kingdom of heaven. He noted that drafting of the Framework is nearing completion along with brief videos to accompany release of the Framework. He highlighted the work of Department of Pastoral Life, ORSMA and SMPAC as facets of promoting and safeguarding spiritual life in the Church. Accomplishments in stewardship reported by the Metropolitan included the annual diocesan chancellors and treasurers meeting, the Stewards of the Orthodox Church in America (SOCA), optimization of OCA Chancery operations, particularly through the efforts of the Human Resources Committee, as well as the work of the Metropolitan Council and the Archives Advisory Committee. He requested consideration of a full-time Secretary to the Metropolitan.

Following a recess at 10:42 AM, the session resumed at 11:07 AM.

Metropolitan Tikhon continued his report, underscoring evangelism and outreach through the newly established Mission School as well as through OCA communications and website personnel. In highlighting the Church's endeavors in external affairs, His Beatitude spoke of the recent consultation of Office of External Affairs and Interchurch Relations. He also reflected on the importance of ongoing work in this area and shared his experiences during recent interviews on PBS and BBC. He indicated the significance of his upcoming visit to Finland. Extensive discussion and questions ensued.

**D. Guiding Framework Session I**

In order to review, especially for new members of the Council, the Guiding Framework for the Orthodox Church in America entitled "*The Apostolic Work of the Church*", which he has been preparing, Metropolitan Tikhon delivered an abbreviated PowerPoint presentation outlining the four pillars of the Framework. Release of the Framework to the Church in a challenging manner and other related issues were discussed.

Following a recess for lunch at 12:35 PM, the afternoon session was called to order at 1:35 PM.

**G. Chancellor's Report (attached)**

Archpriest John Jillions, Chancellor, summarized his attached written report. He noted the importance of reclaiming our Church's vision and history. He highlighted some of the historical events leading to the granting of our autocephaly. He then briefly reported on the work of the Department of Pastoral Life, Board of Theological Education/Diaconal Vocations Program, ORSMA (Office for Review of Sexual

Misconduct Allegations), and SMPAC (Sexual Misconduct Policy Advisory Committee), as well as various clergy matters that are addressed on an ongoing basis. Discussion and questions ensued.

## **H. Secretary's report (attached)**

Archpriest Eric Tosi, OCA Secretary, summarized his attached written report. He spoke of the work of the Committees of the Metropolitan Council. He highlighted the importance of health insurance and other benefits for clergy. He indicated the need to redesign the OCA website and presented the attached prospectus for this proposed project.

### **H.2. Archives Advisory Committee (attached)**

Alexis Liberovsky, Committee Secretary and OCA Archivist, summarized the attached written report and indicated that the environmental assessment of the OCA Archives for which the Council had allocated funding at its last meeting had to be postponed but would be rescheduled in the near future.

Fr. Tosi then reported on initial preparations that will soon be underway for the next All-American Council. Discussion and questions on the Secretary's report ensued.

Following a recess at 3:11 PM, the session resumed at 3:46 PM.

The Legal Report was moved to the following day due to the absence of Angela Parks, who was delayed during travel to the meeting.

## **K. Metropolitan Council Committees**

### **K.1. Charity (attached)**

Archpriest Alexander Kuchta summarized the Committee's attached report. He additionally reported that a charity webpage is being prepared for the OCA website. In discussion, the reasons for the establishment of this committee were noted, particularly the misuse of charity appeal funds years ago. The webpage would clearly state the purpose of the committee and the funding it provides and would provide possibility for donations but would not be a church-wide charity appeal as in the past. It was agreed that this page should be posted along with a donate button on the OCA homepage.

### **K.2. Ethics**

Archpriest Thomas Moore, Committee Chairman, indicated that the Committee has nothing to report at this time.

### **K.3. Human Resources**

In the absence of the Committee's Chairperson, Elizabeth Mikhalevsky, who was delayed to the meeting by her mother's illness, Fr. Tosi reported that she was scheduled to discuss the revision of the attached Employee Handbook and other task assigned to the Committee by His Beatitude.

### **K.4. Internal Governance (attached)**

Archpriest Chad Hatfield presented the committee's attached report and detailed the process for soliciting bids to engage an external auditing firm.

#### **K.4.A. MOTION – HATFIELD/JURY – To engage D'Arcangelo & Co., LLP of Rye Brook, NY as the external auditor for the Orthodox Church in America. CARRIED.**

It was noted that the Metropolitan Council had previously approved by electronic ballot the appointment of John Skrobot and Dimitri Pletz as internal auditors. To fulfill the requirements of the OCA Statute, recommendations for another internal auditor were solicited and the responsibilities of the position were discussed.

The committee structure of the Metropolitan Council was discussed at length, especially in terms to fulfilling the responsibilities of the Metropolitan Council outlined in the OCA Statute.

The session was adjourned with prayer at 4:51 PM.

After dinner, an orientation session was conducted for the newly elected members of the Metropolitan Council.

### **WEDNESDAY, FEBRUARY 17, 2016**

Following the celebration of a Divine Liturgy at Saint Sergius Chapel at the OCA Chancery at 8:00 AM, the meeting was opened with prayer led by His Beatitude, Metropolitan Tikhon at the Immaculate Conception Seminary at 11:02 AM.

#### **J. Stewards of the OCA (attached)**

Raymond Boyd, Stewardship Assistant, delivered the attached PowerPoint presentation on the Stewards of the OCA (SOCA). Discussion and questions ensued.

#### **I. Legal matters (attached)**

##### **I.1. MOTION PARKS/FR. J. VITKO – To move into executive session. CARRIED.**

In executive session Angela Parks, Chairperson of the Legal Committee and Judge E.R. Lanier (OCA General Counsel) presented confidential details of their attached report, which was followed by discussion and questions.

##### **I.2. MOTION DRESKO/GALLICK – To move out of executive session. CARRIED.**

Following a recess for lunch at 12:28 PM, the afternoon session was called to order at 1:36 PM.

#### **L. Treasurer's Report (attached)**

Melanie Ringa highlighted the attached Treasurer's report with a PowerPoint presentation, particularly sharing the final financial results for 2015 and very preliminary figures for the beginning of 2016. In conjunction with budgeting for renovation for the OCA Representative's apartment in Moscow, a discussion ensued on the role of the Representation Church. Concerning budgeted OCA funding for seminaries, the following motion was made.

##### **L.1. MOTION DRESKO/PLETNIKOFF – That the funds designated for seminaries in the 2016 budget be apportioned in equal amounts among the three theological schools of the Orthodox Church in America. CARRIED.**

In conclusion, Ms. Ringa reiterated the need for a third internal auditor as required by the OCA Statute.

#### **M. Financial Development Committee**

Fr. John Dresko proposed the following motion.

**M.1. MOTION DRESKO/HATFIELD – That the Financial Development Committee be subsumed into the Finance/Investment Committee of the Metropolitan Council. CARRIED.**

**N. Finance/Investment Committee**

Fr. Dresko, the new Committee Chairman, discussed the work of the Committee and the budget process, particularly for staff, including the hiring of a full-time secretary to the Metropolitan. He indicated the challenges and adjustments of working under the provisions of the financial resolution adopted at the 18<sup>th</sup> All-American Council. Financing for the next All-American Council was also discussed.

Metropolitan Tikhon led the Council in singing “*Memory Eternal*” for Protopresbyter John Meyendorff to mark the 90<sup>th</sup> anniversary of his birth today.

Following a recess at 2:44 PM, the session resumed at 3:31 PM.

**P. Open Discussion**

Metropolitan Tikhon led an open discussion on a variety of issues including efficient use of time at Metropolitan Council meetings, the organization of the OCA administration, particularly the competencies of departments and the interaction of all entities. It was suggested that departmental work should reflect the four pillars of the Guiding Framework presented by Metropolitan Tikhon. Among numerous issues discussed were communication, clergy health and priestly formation.

The Recording Secretary noted that this is the first meeting of the Metropolitan Council in recent history where all Council members are in attendance.

The session was adjourned with prayer at 5:33 PM.

**THURSDAY, FEBRUARY 18, 2016**

The morning session was opened with prayer at 9:00 AM.

**R. Pension Board Report (attached)**

Fr. Eric Tosi read the attached report on the OCA Pension Plan submitted by Priest Gleb McFatter, Chairman of the Pension Board. In spite of a negative return on Pension Plan investments for calendar year 2015, ending market value of plan assets at December 31, 2015 was \$24,249,348. Current active participating membership in the Plan is 335 (the highest number to date) and 174 people receive monthly benefits.

**T. External Affairs Report**

Protopresbyter Leonid Kishkovsky, Director of External Affairs and Interchurch Relations, delivered an oral report highlighting the following issues:

- The upcoming Great and Holy Council;
- The recent meeting of Patriarch Kirill with Pope Francis. He particularly noted the pastoral letter of Metropolitan Tikhon regarding this meeting and the Metropolitan’s television interviews on PBS and BBC concerning the meeting, which provided a significant American Orthodox witness on the matter;
- Recent developments in the Assembly of Canonical Orthodox Bishops of the USA and other Assemblies around the world;
- Recent events in other Orthodox Churches worldwide and their jurisdictions in America;

- The recent consultation on OCA External Affairs and Interchurch Relations that took place at the Chancery in January, under the leadership of Metropolitan Tikhon;
- The work of a various talented people who have represented the OCA in external and interchurch relations over many years.

Metropolitan Tikhon provided further insights on the Assembly of Canonical Orthodox Bishops and other matters. Extensive discussion of the report and related issues ensued.

Following a recess at 10:53 AM, the session resumed at 11:20 AM.

#### **U. Other Business/Committee Updates**

Elizabeth Mikhalevsky and Fr. Chad Hatfield reported on the meetings of the Human Resources and Internal Governance Committees that convened the previous evening. Fr. Tosi noted that the next Council meeting is scheduled for September 19-22.

#### **S. Guiding Framework Session II**

Metropolitan Tikhon asked for a consensus on a topic among the four pillars of the Guiding Framework for a retreat prior to the next meeting of the Council. The consensus was that the retreat topic should be Spiritual Life and more particularly clergy health. The Internal Governance Committee will take this into consideration in planning the retreat. Preparation of videos to accompany release of the Guiding Framework was discussed. The work of the OCA departments and the availability of other resources for the Church were further deliberated.

Fr. Tosi provided significant new statistical information on parishes in various jurisdictions from Alexei Krindatch, Research Coordinator of the Assembly of Canonical Orthodox Bishops of the USA, which was discussed by the Council.

#### **V. Adjournment**

In conclusion, Metropolitan Tikhon thanked the Council for a productive meeting, noting the significance of full attendance by all the Council members. His Beatitude declared the meeting adjourned at 12:24 PM.

The meeting was concluded with a closing prayer

Respectfully submitted,

Alexis Liberovsky,  
Recording Secretary

# Metropolitan Council

*As of August 16, 2016*

His Beatitude Metropolitan Tikhon  
*Archbishop of Washington and Metropolitan of All America and Canada*  
6850 North Hempstead Turnpike  
Syosset, NY 11791  
(516)922-0550  
Email: [metropolitan@oca.org](mailto:metropolitan@oca.org)

## Officers of the Orthodox Church in America

Archpriest John A. Jillions (Chancellor)  
10 Galway Place  
Huntington, NY 11743-6229

Home: 516-549-2124  
Email: [jjillions@oca.org](mailto:jjillions@oca.org)

Archpriest Eric G. Tosi (Secretary)  
140 Summers Street  
Oyster Bay, NY 11771-3710

Home: 516-922-3504  
Email: [egtosi@oca.org](mailto:egtosi@oca.org)

CH, ET, IG

CD, HR, IG, LE

Melanie Ringa (Treasurer)  
29 Wellsville Avenue  
New Milford, CT 06776-2720

Home: 860-210-7933  
Email: [mringa@oca.org](mailto:mringa@oca.org)

FI

## Members elected by All-American Council

### Members elected at 16<sup>th</sup> AAC for Six-Year Term

Archpriest Chad Hatfield  
27 Maria Lane  
Yonkers, NY 10710-2007

Cell: 914-364-0219  
Work: 914-961-8313 ext 339  
Email: [hatfield@svots.edu](mailto:hatfield@svots.edu)

Maureen Jury  
5921 Lennox Hill Drive  
Plano, TX 75093-8054

Home: 972-403-0222  
Email: [jurydos@verizon.net](mailto:jurydos@verizon.net)

IG

CH, FI

### Members elected at 18<sup>th</sup> AAC for Six-Year Term

Archpriest Anthonio Perdomo  
520 West Rosemary Avenue  
Pharr, TX 78577-0667

Cell: 956-358-8875  
Work: 956-781-6114  
Email: [padreantoniop@att.net](mailto:padreantoniop@att.net)

Katherine Vitko  
6220 Loch Raven Drive  
McLean, VA 22101-3133

Home: 925-667-6451  
Email: [kittyv70@gmail.com](mailto:kittyv70@gmail.com)

CH, ET, HR

HR, IG

<b>Members elected at 18<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest Thomas Moore 634 Wren Road Lexington, SC 29073-9106</p> <p>Cell: 803-318-6093 Church: 803-926-8744 Email: <a href="mailto:frthomas@holyapostles.org">frthomas@holyapostles.org</a></p>	<p>Larry Skvir 156 Whitemarsh Way Delran, NJ 08075-2216</p> <p>Cell: 609-220-6176 Home: 856-461-9474 Email: <a href="mailto:lskvir@aol.com">lskvir@aol.com</a></p>
CH, ET	FI
<b>Alternates elected at 18<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest Elijah Mueller 110 East 55<sup>th</sup> Street Chicago, IL 60615-5112</p> <p>Home: 312-714-9775 Email: <a href="mailto:ElijahNMueller@sbcglobal.net">ElijahNMueller@sbcglobal.net</a></p>	<p>Michael Strelka 1809 North Ridge Avenue Arlington, IL 60004-3748</p> <p>Home: Email: <a href="mailto:michael.strelka@gmail.com">michael.strelka@gmail.com</a></p>
<b>Members Elected by Diocese</b>	
<b>Diocese of Alaska</b>	
<p>Archpriest John Dunlop 414 Mission Road Kodiak, AK 99615-6329</p> <p>Home: 907-486-0950 Email: <a href="mailto:frjohn@sthermanseminary.org">frjohn@sthermanseminary.org</a></p>	<p>Subdeacon Patrick Pletnikoff PO Box 71484 Fairbanks, AK 99707-1484</p> <p>Cell: 907-378-6818 Email: <a href="mailto:patrickjeremyp@yahoo.com">patrickjeremyp@yahoo.com</a></p>
CH	FI
<b>Albanian Archdiocese</b>	
<p>Archpriest Joseph Gallick 3 Wildwood Drive Southborough, MA 01772-1989</p> <p>Home: 508-481-2028 Email: <a href="mailto:Jgall41080@aol.com">Jgall41080@aol.com</a></p>	<p>Donna Dimitri 1901 Beverly Road Burlington, NJ 08016-1114</p> <p>Cell: 609-685-1651 Email: <a href="mailto:donnadimitri@gmail.com">donnadimitri@gmail.com</a></p>
HR	LE
<b>Bulgarian Diocese</b>	
<p>Priest Martin Watt 1411 Wilson Avenue Ames, IA 50010-5463</p> <p>Cell: 515-357-0948 Home: 515-337-1192 Email: <a href="mailto:frmarty@amesorthodox.org">frmarty@amesorthodox.org</a></p>	<p>Popadia Christine Monkowski 12267 Woodside Court Strongsville, OH 44136-4258</p> <p>Cell: 440-554-9396 Email: <a href="mailto:theacvcm@gmail.com">theacvcm@gmail.com</a></p>
FI, IG	

<b>Archdiocese of Canada</b>	
<p>Archpriest Anatoliy Melnyk 1175 rue Champlain Montreal, QC H2L 2R7 Canada</p> <p>Office: 514-522-2801 Email: <a href="mailto:montreal.sobor@gmail.com">montreal.sobor@gmail.com</a></p>	<p>Deacon Nicholas Svetlovsky 486 Boyer Crescent L'Île Bizard, QC H9C 2S3 Canada</p> <p>Home: 514-620-0434 Email: <a href="mailto:niclovsky@hotmail.ca">niclovsky@hotmail.ca</a></p>
IG	FI
<b>Diocese of Eastern Pennsylvania</b>	
<p>Archpriest Timothy Hojnicky 624 Allenview Drive Mechanicsburg, PA 17055-6181</p> <p>Cell: 717-645-5281 Email: <a href="mailto:thoj@hotmail.com">thoj@hotmail.com</a></p>	<p>Susan Grancey Schlasta 1744 Lakeland Drive Scott Township, PA 18433-3117</p> <p>Cell: 570-840-9544 Email: <a href="mailto:sschlasta@gmail.com">sschlasta@gmail.com</a></p>
ET	ET
<b>Diocese of Midwest</b>	
<p>Archpriest Alexander Kuchta 7 Cumberland Court Cary, IL 60013-1912</p> <p>Home: 847-516-6025 Email: <a href="mailto:akyxta@fastsurf.us">akyxta@fastsurf.us</a></p>	<p>Robert Graban 29541 Oakview Street Livonia, MI 48154-4463</p> <p>Cell: 313-702-1300 Email: <a href="mailto:RGraban@yahoo.com">RGraban@yahoo.com</a></p>
CH, CM	FI, IG
<b>Diocese of New England</b>	
<p>Archpriest Robert F. Dick II 34 Fairfield Street Maynard, MA 01754-1743</p> <p>Cell: 978-793-2350 Office: 978-897-4364 Email: <a href="mailto:rfd2@earthlink.net">rfd2@earthlink.net</a></p>	<p>David Zavednak 65 Hyla Lane Northford, CT 06472-1247</p> <p>Home: 203-484-4071 Cell: 203-215-1792 Email: <a href="mailto:dzaved65@gmail.com">dzaved65@gmail.com</a></p>
FI	IG
<b>Diocese of New York and New Jersey</b>	
<p>Archpriest John Shimchick 24 Colmar Road Cherry Hill, NJ 08002-1206</p> <p>Home: 609-315-2894 Office: 856-665-2491 Email: <a href="mailto:FrJS@aol.com">FrJS@aol.com</a></p>	<p>James P. Kornafel 16 Schaeffer Lane Freehold, NJ 07728-2809</p> <p>Home: 732-462-3388 Email: <a href="mailto:jimmyk@optonline.net">jimmyk@optonline.net</a></p>



<b>Romanian Archdiocese</b>	
Open	Open
<b>Diocese of South</b>	
Priest Joseph Lucas 8510 NW 138 <sup>th</sup> Terr Apt 1902 Miami Lakes, FL 33016-6593  Home: 305-332-4454 Email: <a href="mailto:joseph.lucas@yahoo.com">joseph.lucas@yahoo.com</a>	Angela Parks, esq Director of Regulatory Programs Alabama State Bar PO Box 671 Montgomery, AL 36101-0671  Work: 334-269-1515 Email: <a href="mailto:angela.parks@aol.com">angela.parks@aol.com</a>
HR	LE
<b>Archdiocese of Washington</b>	
Archpriest John Vitko 6220 Loch Raven Drive McLean, VA 22101-3403  Home: 925-667-6451 Email: <a href="mailto:john.vitko@gmail.com">john.vitko@gmail.com</a>	Elizabeth Mikhalevsky 309 Yoakum Parkway #611 Alexandria, VA 22304-3931  Home: 571-483-0388 Email: <a href="mailto:lisamik56@gmail.com">lisamik56@gmail.com</a>
	CH, HR
<b>Diocese of West</b>	
Archpriest John J. Dresko 1747 Crystal Downs Ave Las Vegas, NV 89123-2413  Cell: 860-833-4921 Email: <a href="mailto:fatherjohn@lasvegasorthodox.com">fatherjohn@lasvegasorthodox.com</a>	Wesley J. Smith, Esq 19525 Barlow Court Castro Valley, CA 94546-3205  Home: 510-886-8609 Cell: 510-501-6642 Email: <a href="mailto:wesley@discovery.org">wesley@discovery.org</a>
FI, HR	LE
<b>Diocese of Western Pennsylvania</b>	
Priest Nikolai Breckenridge 150 Elmtree Road New Kensington, PA 15068-4636  Cell: 570-604-4277 Home: 724-337-8162 Email: <a href="mailto:nikolai.breckenridge@gmail.com">nikolai.breckenridge@gmail.com</a>	Dr. John Schultz 11 Ralston Lane Weirton, WV 26062-5535  Cell: 304-479-5071 Home: 304-748-1223 Office: 304-723-3967 Email: <a href="mailto:jpswv@comcast.net">jpswv@comcast.net</a>
	ET, HR
<b>Committee Codes:</b>	
CH = Charity ET = Ethics FI = Finance/Investment	HR = Human Resources IG = Internal Governance LE = Legal <b>Bold/Italic = chairperson</b>

**FROM: Archpriest Eric G. Tosi, Secretary**  
**TO: Holy Synod and Metropolitan Council**  
**DATE: February 22, 2016**  
**REF: Metropolitan Council Committees**

The following is the organization of the Metropolitan Council for the current term. Each member volunteered to serve on the different committees. Each committee has a member of the Lesser Synod and an officer of the Church.

1. Currently these are the established committees. Charity, Ethics, Finance/Investment, Human Resources, Internal Governance, Legal. These committees must have at least three members of the MC to be qualified under NY State non-profit law. The Financial Development Committee was merged with Finance Investment committee.
2. There are special committees that must have at least 1 member under NY State Non-profit law and have qualifications to serve. They are legal and charity.
3. There is an Internal Auditor Committee which is mandated by the AAC and is comprised of qualified external people who report to the MC.
4. There are 32 members (Metropolitan), 3 officers, 4 at large and 24 diocesan)
5. Each MC member should be a member of one committee and all should serve
6. Additional membership on a committee from outside the MC should be termed consultants and approved by Metropolitan and Metropolitan Council
7. Each committee chair will be chosen within the committee and be responsible for all meetings, communication and present a report at each meeting
8. Each committee should be a mix of clergy and lay and take into account skill sets

**Charity (Special and needs 501©3 charitable training):**

**Fr. Alexander Kuchta (chair)**  
**Bishop Melchisedek (Synod Liaison)**  
Fr. John Jillions (Chancery Liaison)  
Fr. John Dunlop  
Fr. Thomas Moore  
Fr. Antonio Perdomo  
Maureen Jury  
Lisa Mikhalevsky

**Ethics:**

**Fr. Thomas Moore (Chair)**  
**Bishop Alexander (Synod Liaison)**  
Fr. John Jillions (Chancery Liaison)  
Fr. Timothy Hojnicky  
Fr. Antonio Perdomo  
Dn. Esteban Vazquez  
Susan Schlasta  
Dr. John Schultz

**Finance/Investment:**

**Fr. John Dresko (Chair)**  
**Bishop Irene (Synod Liaison)**  
Melanie Ringa (Chancery Liaison)  
Fr. Robert Dick  
Fr. Justin Mitchell  
Fr. Martin Watt  
Bob Graban

Maureen Jury  
Jeremy Pletnikoff  
Larry Skvir

**Human Resource:**

**Lisa Mikhalevsky (Chair)**  
**Archbishop Nathaniel (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
Fr. John Dresko  
Fr. Joseph Gallick  
Fr. Joseph Lucas  
Fr. Antonio Perdomo  
Dr. John Schultz  
Katherine Vitko

**Internal Auditors:**

*Not a Committee per MC but reports to MC as through  
AAC amendment to statutes*  
**John Skrobot**  
**Dimitri Pletz**  
**Theodora Blom**

**Internal Governance:**

**Fr. Chad Hatfield (Chair)**  
**Bishop Melchisedek (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
Fr. Anatoliy Melnyk  
Fr. Martin Watt  
Bob Graban  
Katherine Vitko  
David Zavednak

**Legal (Special and needs legal qualifications):**

**Angela Parks (Chair)**  
**Archbishop Nikon (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
Wesley Smith  
Donna Dmitri  
*Gregory Nescott (consultant)*  
*Judge E. R. Lanier (consultant)*

# **Preliminary Report for the 19th All-American Council**

## **Archpriest Eric G. Tosi**

### **1. Introduction**

The 19<sup>th</sup> All-American Council will be held in 2018. As such, planning has begun for sites and dates that would adhere to the guidance from the Holy Synod. Dn Peter and Ilchuk and I prepared a prospectus on the requirements for the AAC. We once again contracted Conference Direct as our AAC partners as they have assisted us successfully for many years. Roxanne Kramer was once again assigned as our representative. As a note, we do not pay Conference Direct but rather they get their fees from the hotel that we choose. They have much more clout and influence on the negotiating process and can search every major hotel in every city throughout North America.

Following the prospectus process and the search process, Conference Direct came back to us with a list of possible cities and sites. There were initially some 18 cities throughout the United States that were part of the bidding process. After more negotiations this was brought down to nine and eventually three finalists. It should be noted that the OCA does have a series of contract assumptions which some cities can meet and some cannot. In addition, local Convention and Visitors Bureaus (CVB) are brought into the process as they offer incentives such as paying for site visits and funding opportunities.

### **2. Preplanning Assumptions**

The Holy Synod has directed these preplanning assumptions. These assumptions are:

- A. The Council should be held in the summer so that there could be more family participation. This is important as part of the negotiations with the potential Council sites. There should be activities for families as well as consideration of the weather.
- B. That there should once again be a "youth" component to the Council. The last AAC in Atlanta, while not as large as previous youth components, was highly successful. Their final presentation was one of the highlights of the AAC. So once again we will have a youth component.
- C. FOCA held their annual convention in conjunction with the 18<sup>th</sup> AAC in Atlanta. It was the first time this was done and it was also very successful. Not only was FOCA (re)introduced to the OCA but FOCA benefitted with better attendance and outreach. FOCA has asked to once again be a part of the planning process.
- D. The major consideration when planning the AAC is costs. We have been successful in keeping overall costs down or restrained due to shifting to more paperless operations such as electronic registration and reports. The major

consideration is still the bottom line for parishes and their delegates. It is a considerable investment to come to an AAC not only through assessments but travel, hotel and food. We are acutely conscious of this fact and look for sites that have the best pricing in all of these matters.

E. An AAC cannot be run without serious local support. We often utilize up to 100 volunteers during the entire pre-planning and operation of the Council. So we must find a site that can support the AAC with volunteers and not be so much of a strain on the local parishes.

F. The initial list of cities were as follows:

1. Boston (too expensive)
2. Hartford (no space available on dates)
3. Providence (no space available on dates)
4. Dayton (no space available on dates)
5. Wichita (no local committee)
6. Chicago (too expensive)
7. St. Louis (3 hotels bids on AAC – 1 in range)
8. Kansas City (3 hotel bids on AAC – 1 in range)
9. Milwaukee (no space available on dates)
10. Cleveland (1 hotel bid on AAC – not in range)
11. Indianapolis (1 hotel bid on AAC – not in range)
12. Minneapolis (3 hotel bid on AAC – not in range)
13. Detroit (2 hotel bids on AAC – 1 in range)
14. Denver (3 hotel bids on AAC – none in range)
15. Atlantic City (not feasible in cost and support)
16. Erie (1 bid but not large enough to host)
17. Philadelphia (2 hotel bids on AAC – none in range)
18. Baltimore (2 hotel bids on AAC – none in range)

As can be seen, many of the hotels were either too expensive, did not have dates or could not support an AAC. The final list was narrowed down to St. Louis (St. Louis Union Station Hotel by Doubletree), Detroit (Detroit Marriott at the Renaissance Center), and Kansas City (Sheraton Kansas City Hotel at Crown Center). These three sites were visited in July by Dn Peter, Ms. Kramer and myself. We also meet with the CVB at all three cities.

### **3. Decision Points**

A. The first major decision point is the date of the 19th All American Council. Not all of the dates requested are available at all of the hotels. For example, one site only had dates available after July 4 and this would preclude FOCA and other youth activities due to Church camps. Other sites were already filled on our requested dates (focusing on July and August timeframes) which means that future planning will need to happen earlier. A number of sites were

dropped simply because of the dates. However based on calendars, fasts, feasts, etc., the following dates were proposed:

1. Friday, July 6, 2018 – Saturday, July 14, 2018 (Detroit)
2. Friday, July 20, 2018 – Saturday, July 28, 2018 (St. Louis)
3. Friday, July 27, 2018 – Saturday, August 4, 2018 (Kansas City)

B. The next major decision is the location as the choice of city will affect the date of the Council. Note that if Detroit is chosen then we lose FOCA. Involved in this recommendation are many options including local, support, hotel facilities, concessions and price, as well as transportation costs for both delegates and equipment. A major consideration (and consistently articulated to the bidding hotels) was the bottom line. In other words, what was the cost going to be for a parish to send delegates to the AAC. This includes the costs of hotel room, the range of food options in the immediate area, costs of transport to the location, and any possible extra expenses. This also includes a range of family friendly options for the youth component.

After consideration and consultation, it is recommended that St. Louis be chosen as the site of the 19th All American Council. These are the reasons:

1. The hotel costs for Detroit is very high and the dates means we lose FOCA. They also do not want to give us space on Saturday to set up the chapel and they want to double book the hotel with other groups (It is a very large hotel). However, the area is very nice and part of the renovation project, it is in the headquarters of GM so there is a food court and many amenities. The rooms are odd shaped and while they would work, they would be hard to fit in everything without getting some space considerations that the hotel is unwilling to accommodate us. There is no public transportation from the airport but there is easy transportation in the area. The local committee would work fine and there is plenty to do for activities. However, the major issue is the hotel cost, even though the CVB was willing to contribute some modest money to the AAC. They are unwilling, even after major negotiations and concessions, to come down in room price below \$145 a night.

2. Kansas City does have good space and decent pricing. The hotel does not have public transportation to the site and is located in an uninspiring area. The hotel is near to major mall with plenty of food options. There are some things to do for activities. The CVB also offered to contribute some modest money to the AAC. The hotel does want to take back space from the AAC during the week and it would make operations more difficult. It is spread out but not unmanageable. The cost is about the same as St. Louis and there is a local committee that can be utilized if the entire Kansas City Deanery is used. The overall feel to the hotel and space

usage is fine but not inspiring. It would be our second recommendation. The current room price is \$139 a night.

3. The hotel in St. Louis is amazing. It is the old Union Station that has been converted into a hotel. It is compact and beautiful. The main open area is classic art deco and the exhibit area is an open area that leads into the main ballroom. This means more traffic as well as a more interesting interaction. The hotel is served by public transportation, and has a decent number of food options including on site. There are plenty of activities in the area and it is easy to get around downtown St. Louis. The local support would be from the local Kansas City Deanery (which does extend into the St. Louis area) and would work. There are also a number of interesting Orthodox activities in the area to support and visit including FOCUS North America. The dates work perfectly and the hotel has agreed to all of our requests and concessions. They also are part of a network of 19 hotels in the local area and AV costs will be considerably lower due to the hotel’s ability to draw upon these resources. There may be a need for an overflow hotel which is just across the street. The hotel price is well within the range at \$134 (same as Atlanta) and the rooms are very well appointed. The site is impressive and our recommendation for the 19<sup>th</sup> AAC.

**St. Louis Comparison**

<b>Item</b>	<b>Original Offer</b>	<b>Current Offer</b>
Room Rate	149.00	134.00
Staff Rate	99.00	89.00
Parking Rate	25.00 per day	10.00 per day
Complimentary Parking	N/A	10 Vehicles for the week
Food and Beverage Minimum	75,000	60,000
City Incentive	N/A	5,000
Airport Transfers	N/A	5 VIP Round Trips
Comp Rooms	N/A	Up to 40

C. There will be the need to appoint a Preconciliar Commission. The preplanning committee will now morph into the Preconciliar Committee. The PCC requires an Episcopal chair and it is recommended to nominate His Grace Bishop Paul to this position. Fr. John Jillions and Melanie Ringa as officers of the Church be appointed. Fr Eric will be the Chair of the PCC as per his job description and will be assisted by Dn. Peter Ilchuk as Council Manager. Fr. Timothy Hojnicky should be appointed as the Metropolitan Council representative. It is recommended that Becky Tesar as FOCA’s Immediate Past President be appointed. It is recommended that the local clergy chair be Fr. Timothy Sawchak, dean of the Kansas City Deanery and Bob Butchko be the lay

chair on recommendation of His Grace Bishop Paul. They both have been blessed by Bishop Paul to serve. Finally, a representative from the Youth Department should be appointed in order to ensure proper integration of the youth component. It is recommended that we once again appoint Fr. Benjamin Tucci who ran the program in Atlanta. This will bring the PCC to ten people which is the normal and functional size. The final appointments are then recommended to the Holy Synod for approval. For more information on the duties and responsibilities of the PCC, refer to Article III, Section 5 of the Statute.

D. The next decision is on the goals for this AAC. Certainly there are some minor work such as Statute amendments but what is this AAC going to accomplish and build upon after such a successful AAC in Atlanta? Following the last AAC, a number of ideas have been circulating which includes:

1. A serious look into Church and theological education
2. A focus on the parish and parish life
3. The development of youth
4. Developing Church leadership
5. Continuing the theme of expanding the mission and evangelism
6. Church and community service by engaging the local area
7. Other?????

The Holy Synod and the Metropolitan Council will also need to consider any other elements that would desire to be integrated into the AAC. So at this point any suggestions would be helpful to the PCC for consideration.

E. It seems that we hit on a good formula for the AAC in Atlanta. We reduced the plenary sessions to six and had two afternoons of workshops. This should be continued. In addition, the combination of seminars and diocesan assemblies on Monday worked well. The receptions for the seminaries, SOCA and formal dinner on Thursday also worked well. We should also continue the short movies as that was very well received (one idea was that each diocese pick one or two parishes to highlight).

We also wanted to ensure that the body of the Council had an opportunity to speak and ask questions of concerns and that there was a level of transparency. This took a considerable amount of time and often led to a monopoly of the time by a few individuals. But we need to manage it better and keep the AAC as open as possible.

There does seem some who believe that the purpose of the AAC is to discuss major moral and ethical issues and issue statements. This, of course, would take a considerable amount of time and debate. If this is the direction then perhaps many of these issues could be formed into committees which debated prior to the Council and simply bring up recommendations for votes by the AAC. But we must ensure that these issues are within the competence of the AAC.



There are others who believe that the AAC should be primarily social. This presents a whole other way of planning the sessions that would allow for more interaction and less plenary sessions.

What is clear is that whatever the direction, the agenda must reflect the goals of the AAC. There is a considerable cost and time involved and there must be something accomplished that allow people to bring back their parishes to report and know that they have moved the Church forward. There must be a balance of what the Council needs to do and what it would like to do. That is the guidance the PCC needs.

F. We will continue to evolve the electronic registration and reporting process. It saved a considerable amount of time and money and worked well. We learned a lot in Atlanta and have already made plans to integrate the revisions. Other suggestions are welcome. We will look at electronic voting but it still seems to be cost prohibitive.

G. The assessment level will need to be established for this AAC. The new Statute has made this much more flexible and the initial plan is for dioceses to be assessed who will in turn assess their parishes as they see proper. A preliminary budget will be formed based on both Seattle and Atlanta and be submitted for approval in due time.

#### **4. Conclusion and Action Items**

The following action points are recommend to be adopted subject for the approval and guidance of the Holy Synod:

A. The 19th AAC will be held on Monday, July 23 to Friday, July 27, 2018 at the St. Louis Union Station Hotel by Doubletree. The FOCA Convention will be held Saturday, July 28, 2018 to Monday, July 23, 2018 prior to the AAC.

B. The Preconciliar Committee be formed as recommended.

C. Authority is given to discuss with and formulate local chairs and committees as determined by the PCC.

D. A preliminary budget be established and financing method decided.

E. Preliminary theme, goals and direction of the 19<sup>th</sup> AAC be discussed.

F. Preliminary organization of the 19<sup>th</sup> AAC be established.

G. All other operational matters are the purview of the PCC subject to approval by the Metropolitan Council and Holy Synod.

**19<sup>th</sup> All American Council**

**Venue Search Update**

**5/25/16**

**(Prepared by Dn. Peter Ilchuk)**

The Following dates are being researched in no particular order:

1. Friday, July 6, 2018 – Saturday, July 14, 2018
2. Friday, July 13, 2018 – Saturday, July 21, 2018
3. Friday, July 20, 2018 – Saturday, July 28, 2018
4. Friday, July 27, 2018 – Saturday, August 4, 2018

Beginning the search with 15 cities, he is the results of the initial request for proposals:

1. Boston (Rates to high)
2. Chicago (Rates to high)
3. Dayton (Hotel space not available)
4. Hartford (Hotel space not available)
5. Milwaukee (Hotel space not available)
6. Providence (Hotel space not available)

Here is the list of cities and properties that would work for our group in terms of space; we are waiting to hear back on the proposals.

**1. Baltimore**

- a. Baltimore Marriott Waterfront
- b. Hilton Baltimore

**2. Cleveland**

- a. Hilton Cleveland Downtown

**3. Denver**

- a. Denver Marriot City Center
- b. Hyatt Regency Denver at Colorado Convention Center
- c. Sheraton Denver - Downtown Hotel

**4. Detroit**

- a. Edward Village Michigan Hotel and Convention Center (Dearborn)
- b. Detroit Marriot at the Renaissance

**5. Indianapolis**

- a. JW Marriott Indianapolis

**6. Kansas City**

- a. Kansas City Marriot Downtown
- b. Sheraton Kansas City Hotel at Crown Center
- c. The Westin Kansas City at Crown Center

**7. Minneapolis**

- a. Doubletree Bloomington – Minneapolis South
- b. Hilton Minneapolis
- c. Hyatt Regency Minneapolis

**8. Philadelphia**

- a. Philadelphia Marriott Downtown
- b. Sheraton Philadelphia Downtown

**9. St. Louis**

- a. Hyatt Regency St. Louis at the Arch
- b. Marriott St. Louis Grand



**Orthodox Church In America 19th All American Council**

Hotel	City/State	Status	Date Offered	Room Rate
<b>Available</b>				
<b>Atlantic City Convention Center</b>	Atlantic City, New Jersey	Submitted Proposal	<i>TBD June and August New Dates</i> 1) July 6 - 14, 2018 - Room rates too expensive 2) July 13 - 21, 2018 - 2nd Option 3) July 20 - 28, 2018 - Space not available 4) July 27 - August 4, 2018 - 1st Option	\$140 Group Rate
<b>Hilton Cleveland Downtown</b>	Cleveland, Ohio	Submitted Proposal	Only able to offer July 6 - July 14, 2018 close to budget	\$169 Group Rate / \$99 Staff

<b>Detroit Marriott at the Renaissance Center</b>	Detroit, Michigan	Submitted Proposal	The only set of dates available: July 6-14th	\$145.00 Group Rate / \$109 Staff
<b>Sheraton Erie Bayfront Hotel &amp; Bayfront Convention Center</b>	Erie, Pennsylvania	Submitted Proposal	Fri, 22-Jun-2018 to Sat, 30-Jun-2018 (Alt) Fri, 06-Jul-2018 to Sat, 14-Jul-2018	\$159 group rate / \$99 Staff \$175 group rate
<b>Sheraton Kansas City Hotel at Crown Center</b>	Kansas City, Missouri	Submitted Proposal	Fri, 06-Jul-2018 to Sat, 14-Jul-2018	\$139. ROH, \$129 Suite Upgrades, \$119 Staff. We only have July 6-14, 2018 available.

<b>Marriott St. Louis Grand</b>	St. Louis, Missouri	Submitted Proposal	We are only able to offer availability near budget for the August 10-18 date option.	\$139 group rate
---------------------------------	------------------------	-----------------------	---	------------------

F&B Minimum	The majority of the ROH rooms will require DOUBLE beds. How many Double Bedded rooms does your hotel have in inventory? How many would be able to be blocked for this group?	For hotels that do not have enough guest rooms or otherwise if an overflow hotel is needed to fill the room block, what is the nearest overflow hotel you would recommend?	Can you meet all of the meeting room needs? If there are any limitations, please list them here.	What is the name and square footage for the proposed Ballroom for the Chapel and Plenary Sessions?
No F&B minimum - \$25,000 Rental + Union Fees. CVB to offset costs up to \$45,000.	The Sheraton has 400	Bally's or Caesars Hotel Casinos committed overflow blocks of 100 at each property at a room rate of \$140	The Atlantic City Convention Center can accommodate all meeting room needs.	Atlantic City Convention Center - Chapel - Hall A and Plenary Sessions -
\$75,000 . Note hotel only has 46,000 sq ft of space so flexibility will be needed to make agenda work and some rooms will need to be turned and repurposed.	249 total; 245 offered to group	500 rooms is max, if need for overflow, Marriott, Drury Plaza, and Westin are all within one block	Some limitations on food functions. Dinner for all attendees and Continental Breakfast for all attendees can we do in the exhibit hall?  Also, some receptions would be	Superior Ballroom 20,778 sq ft

\$55,000 F&B minimum, comp meeting space with 80% pick up of rooms	600 doubles in inventory/500 can be blocked for this meeting	N/A. Hotel has 1298 guest rooms	Yes	Renaissance Ballroom - 25,801 sq ft - divisible by 3 rooms, largest room 13,456 sq ft and other two sides 6,740 sq ft each.
\$55,000 / comp rental	67 Doubles at the Sheraton 113 Doubles at the Courtyard	n/A	Yes	Great Hall Grand Ballroom
\$50,000 <b>Currently negotiating</b> <b>\$28,000 rental</b>	316 doubles, 371 kings	we have a Westin Crown Center across the street. We are a complex hotel and I can book both for you.	yes	Exhibit Hall A (30k sq ft), Exhibit Hall B (15k sq ft), San Fran(2800sf) and Chicago(5000sf) (Youth rooms, Chouteau (2000sf), Empire (4000sf), VanHorn (2000sf)

<p>\$85,000 . Note: still Negotiating space move in on Friday.</p>	<p>We have a total of 493 double rooms, we are able to commit 425 doubles to your group.</p>	<p>We are able to accommodate the entire block at our hotel.</p>	<p>Majestic A-E would be proposed for Plenary Session, it is 15,760 sf and Landmark Ballroom would be proposed for Church Tables and Displays and is 11,094 sf.</p>	<p>Majestic A-E would be proposed for Plenary Session/Chapel, it is 15,760 sf.</p>
--	--	--	---	--



What is the name and square footage for the proposed Ballroom for the Exhibit and Display Set Up?	Is all meeting space complimentary? If no, please indicate any applicable rentals or set up fees here:	Is there a food and beverage minimum? If so, please list.
Atlantic City Convention Center Hall B - 83,400gsf	All meeting space will be covered by the incentive of \$45,000	No
Hope Ballroom 15,729 sq ft	Yes, with \$75,000 f&b minimum	\$75,000

Ontario Hall East - 16,863 sq ft	Meeting space complimentary based upon 80% guest room pick up and F&B minimum guarantee	\$55,000
Great Hall Grand Ballroom	Yes	\$55,000
Exhibit Hall A - 30,000sf	no - Exhibit hall space \$4000 per day - \$28,000 total	yes, \$50,000 min with \$100,000 spend

Landmark Ballroom would be proposed for Church Tables and Displays and is 11,094 sf.	Yes, based upon meeting the \$85,000++ F&B Minimum.	Yes, \$85,000++.
--	---	------------------

<p><b>Are you able to offer all the concessions required &amp; requested? If no, please explain.</b></p>	<p><b>Meeting Room set ups will change many times during the program. Are you able to waive any set up or room changing fees for this group? If no, what are the fees? (Hotels that can waive these fees will be preferred.)</b></p>	<p><b>The Youth will have some of their own events and meals during the convention. Will your hotel agree to special discounted menus that are tailored in proportion and cost for the Youth Functions?</b></p>
<p>The Sheraton Atlantic City Convention Center Hotel can only offer (8) Suite Upgrades at the Group Rate. <b>CVB has agreed to offset costs up to \$45,000</b></p>	<p>Yes - we have 45 meeting rooms so there should be minimal need for meeting room change over.</p>	<p>TBD</p>
<p>No not all complimentary rooms honored, done as complimentary upgrades at group rate Parking is currently \$28 self/\$32 valet, not able to offer comp</p>	<p>Union fees for hotel at TBD at this time, our hotel opening June 1, 2016 so we are still working these details out</p>	<p>Yes</p>

<ul style="list-style-type: none"> <li>• Two complimentary Governor Suites, with adjoining complimentary standard rooms; one for the Metropolitan (head Bishop) plus his aide</li> <li>• Four complimentary One Bedroom Junior type suites for the 1) National Chancellor 2) Secretary 3) Treasurer 4) Director of Communications</li> <li>• One complimentary Junior Suite for the Council Manager</li> <li>• Four complimentary Junior Suites for Bishops</li> </ul>	<p>Hotel does not prefer multiple room changes; however, Hotel will allow some limited room set changes without a charge. Based on what the specific needs are for room set changes, group may incur a charge with the fee depending upon the size of room and room set style.</p>	<p>Hotel Chef will work with the group to offer a youth meal plan within group's budget.</p>
<p>Complimentary parking Complimentary WiFi 1 per 50</p>	<p>To be determined</p>	<p>Yes</p>
<p>staff rooms @ \$119 / (11) suites discounted at \$129 / (9) suites complimentary, 20% disc with AV (PSAV exclusive), complimentary in room internet, 10% discount on F&amp;B for 2018 menu</p>	<p>Meeting room set ups will depend on the # of Changes. we may have enough space that you won't have to make changes.</p>	<p>yes</p>

<p>No, we are able to offer:</p> <ul style="list-style-type: none"> <li>- (2) complimentary one bedrooms Presidential Suites on peak nights of Sun-Thurs.</li> <li>- (4) complimentary Junior Suites on peak nights of Sun-Thurs.</li> <li>- (1) complimentary Studio Suite on peak nights of Sun-Thurs.</li> <li>- (4) complimentary Studio Suites on peak nights of Sun-Thurs.</li> <li>- (6) complimentary standard double rooms on peak nights of Sun-Thurs.</li> <li>- 1/75 complimentary room policy.</li> <li>- (11) upgrades to city view rooms on peak nights of Sun-Thurs.</li> <li>- (30) standard double rooms at \$109 for Staff.</li> <li>- Group rate available (3) days pre/post, based upon hotel room and rate availability.</li> <li>- Waive room re-set fees with meeting 80% attrition.</li> <li>- Complimentary meeting space with \$85,000++ F&amp;B minimum.</li> <li>- 24 hour hold on proposed meeting space.</li> <li>- Complimentary guestroom basic WIFI for all Marriott Rewards Members that pay on own.</li> <li>- Complimentary basic WIFI in meeting space if in-house AV company is selected as the exclusive provider for this program.</li> <li>- 10% discount on 2018 self-parking rates.</li> <li>- Complimentary pre-plan to include: (1) boardroom, (4) complimentary rooms for up to (2) nights, based upon hotel availability.</li> <li>- 15% on AV equipment, if in-house AV company is selected as the exclusive provider for this program.</li> <li>- Hotel will provide at no charge: water coolers in foyer, pads, pens</li> </ul>	<p>We will waive this fee upon meeting 80% of the room block. If that is not met we will put a sliding scale of fees in place.</p>	<p>We are happy to customize menus, our chef can certainly review the requests and put together a cost or work with the budget to put together the menu.</p>
--	--	--

**The OCA is a tax exempt organization. Does your hotel accept Tax Exempt Status? State or Federal?**

The Atlantic City Convention Center will accept Tax Exempt Status State.

Yes

Yes. State/Federal
Yes
yes - both



Yes, state tax.



**ORTHODOX  
CHURCH in  
AMERICA**

---

**19<sup>TH</sup> ALL-AMERICAN  
COUNCIL**

**SO IT BEGINS...AGAIN**

# 19<sup>TH</sup> ALL-AMERICAN COUNCIL

- CONTRACT WAS SIGNED WITH CONFERENCE DIRECT
- DIRECTION RECEIVED
- ORIGINAL SEARCH YIELDED 19 CITIES INTERESTED
- WHITTLED DOWN TO 3 CITIES
- 3 SITES VISITED AND NEGOTIATED
- PRECONCILIAR COMMISSION READY FOR APPOINTMENT
- LOCAL CLERGY AND LAY CHAIR READY FOR APPOINTMENT
- LOCAL COMMITTEE NEEDS VISIT
- ORGANIZATION OF NATIONAL AND LOCAL OPERATIONS
- INITIAL LAY-OUT AND OPERATIONS

# PRE PLANNING ASSUMPTIONS

- IN THE SUMMER SO THERE CAN BE MAXIMUM PARTICIPATION
- COSTS MUST BE, AS A MINIMUM, SAME AS ATLANTA
- HOTEL CAN HANDLE OUR REQUIREMENTS
- CITIES MUST BE ACCESSIBLE
- MUST HAVE SUFFICIENT LOCAL SUPPORT
- YOUTH COMPONENT
- ANNUAL FOCA CONVENTION

# THE 19 FINALIST CITIES WERE:

1. Boston (too expensive)
2. Hartford (no space available on dates)
3. Providence (no space available on dates)
4. Dayton (no space available on dates)
5. Wichita (no local committee)
6. Chicago (too expensive)
- 7. St. Louis (3 hotels bids on AAC – 1 in range)**
- 8. Kansas City (3 hotel bids on AAC – 1 in range)**
9. Milwaukee (no space available on dates)
10. Cleveland (1 hotel bid on AAC – not in range)
11. Indianapolis (1 hotel bid on AAC – not in range)
12. Minneapolis (3 hotel bid on AAC – not in range)
- 13. Detroit (2 hotel bids on AAC – 1 in range)**
14. Denver (3 hotel bids on AAC – none in range)
15. Atlantic City (not feasible in cost and support)
16. Erie (1 bid but not large enough to host)
17. Philadelphia (2 hotel bids on AAC – none in range)
18. Baltimore (2 hotel bids on AAC – none in range)

# THE THREE FINALIST ARE:

Detroit Marriott at  
the Renaissance Center



Sheraton Kansas City Hotel  
at Crown Center



St. Louis Union Station Hotel  
by Doubletree



# COMPARISON OF THE 3 BIDS

<b>Offer</b>	<b>Detroit</b>	<b>Kansas City</b>	<b>St. Louis</b>
Room Rate	\$145	\$139	\$134
Staff Rate	\$109	\$119	\$89
Parking Rate	\$25	\$25	\$10 a day
Comp Parking	None	None	10 per week
F & B	\$55,000	\$50,000	\$60,000
CVB Incentive	\$5,000	\$5,000	\$5,000
Airport Transfer	None	None	5 VIP Trips. Train
Comp Room	11	9	1 per 40 room
Meeting Rooms	Split with other	\$28,000	Entire Hotel
Other	Limited change	Not all available	Overflow
Dates	Friday, July 6, 2018 – Saturday, July 14, 2018	Friday, July 27, 2018 – Saturday, August 4, 2018	Friday, July 20, 2018 – Saturday, July 28, 2018

AND THE RECOMMENDATION IS....

**ST. LOUIS UNION STATION HOTEL**

**FRIDAY, JULY 20, 2018 – SATURDAY, JULY 28, 2018**





# GENERAL TIMELINE

- HOLY SYNOD BLESSES CITY AT FALL MEETING
- APPOINTMENT OF PCC AT FALL HOLY SYNOD
- INITIAL LOCAL MEETINGS – OCTOBER/NOVEMBER
- INITIAL PCC MEETING – NOVEMBER/DECEMBER
- PCC TO ESTABLISH THEME, LOGO, AGENDA AND MATERIAL
- LOCAL COMMITTEE TO ESTABLISH WORKING GROUPS WITHIN AREAS, SET UP LOCAL ACCOUNTS AND CONTACTS, PREPARE SITE
- CHANCERY TO COORDINATE ALL ACTIVITIES
- AAC COMMITTEES APPOINTED 30 DAYS PRIOR

# COMPOSITION OF PCC

## ARTICLE III, SECTION 5

- THE HOLY SYNOD SHALL APPOINT A PRECONCILIAR COMMISSION, NOMINATED BY THE METROPOLITAN COUNCIL. THE PRECONCILIAR COMMISSION SHALL:
  - A. RECOMMEND TO THE METROPOLITAN COUNCIL AND HOLY SYNOD, FOR THEIR APPROVAL AND CONFIRMATION, THE DATES, LOCATION, AND THEME OF THE ALL-AMERICAN COUNCIL;
  - B. ESTABLISH SUCH COMMITTEES AS MAY BE NECESSARY FOR THE PROPER OPERATION OF THE ALL-AMERICAN COUNCIL, SUCH AS A LOCAL FUNCTIONING COMMITTEE, A RESOLUTIONS COMMITTEE, A CREDENTIALS COMMITTEE, AND A TRANSLATIONS COMMITTEE;
  - C. PROPOSE AN AGENDA AND RULES OF PROCEDURE FOR THE ALL-AMERICAN COUNCIL AND SUBMIT IT TO THE METROPOLITAN COUNCIL FOR APPROVAL AND CONFIRMATION BY THE HOLY SYNOD, IT BEING UNDERSTOOD THAT THE AGENDA MAY BE CHANGED BY VOTE OF THE ALL-AMERICAN COUNCIL;
  - D. ESTABLISH AND OVERSEE PROCEDURES FOR REGISTRATION AND CERTIFICATION OF MEMBERS AT THE ALL-AMERICAN COUNCIL;
  - E. ESTABLISH ALL-AMERICAN COUNCIL ASSESSMENTS AND FEES;
  - F. PUBLISH THE AGENDA, NOTICES, AND ARRANGEMENTS FOR THE ALL-AMERICAN COUNCIL AT LEAST SIXTY (60) DAYS PRIOR TO THE DATE SET FOR THE CONVENING OF THE ALL-AMERICAN COUNCIL;
  - G. ENSURE THAT PROPOSED AMENDMENTS TO THE STATUTE, TOGETHER WITH RECOMMENDATIONS OF THE COMMISSION ON CANONS AND STATUTES, ARE PUBLISHED AT LEAST SIXTY (60) DAYS PRIOR TO THE DATE SET FOR THE CONVENING OF THE ALL-AMERICAN COUNCIL;
  - H. NOTIFY MEMBERS OF THEIR CERTIFICATION AT LEAST THIRTY (30) DAYS PRIOR TO THE DATE SET FOR THE CONVENING OF THE ALL-AMERICAN COUNCIL; AND
  - I. ASSURE THAT ALL REPORTS TO THE ALL-AMERICAN COUNCIL ARE IN WRITTEN FORM AND THAT THEY ARE PUBLISHED AT LEAST THIRTY (30) DAYS PRIOR TO THE DATE SET FOR THE CONVENING OF THE COUNCIL.

# 19<sup>TH</sup> AAC PRECONCILIAR COMMISSION

- BISHOP PAUL (SYNOD)
- ARCHPRIEST JOHN JILLIONS  
(CHANCELLOR)
- ARCHPRIEST ERIC G. TOSI  
(SECRETARY AND  
SUPERVISOR)
- MELANIE RINGA  
(TREASURER)
- DN. PETER ILCHUK  
(COUNCIL MANAGER)
- PRIEST TIMOTHY HOJNICKI  
(MC REPRESENTATIVE)
- ARCHPRIEST TIMOTHY  
SAWCHAK  
(LOCAL CLERGY CHAIR)
- BOB BUTCHKO  
(LOCAL LAY CHAIR)
- PRIEST BENJAMIN TUCCI  
(YOUTH)
- BECKY TESAR  
(FOCA)
- *ARCHPRIEST LEONID  
KISHKOVSKY (CONSULTANT)*

# MANDATED TIMELINE (PER STATUTE)

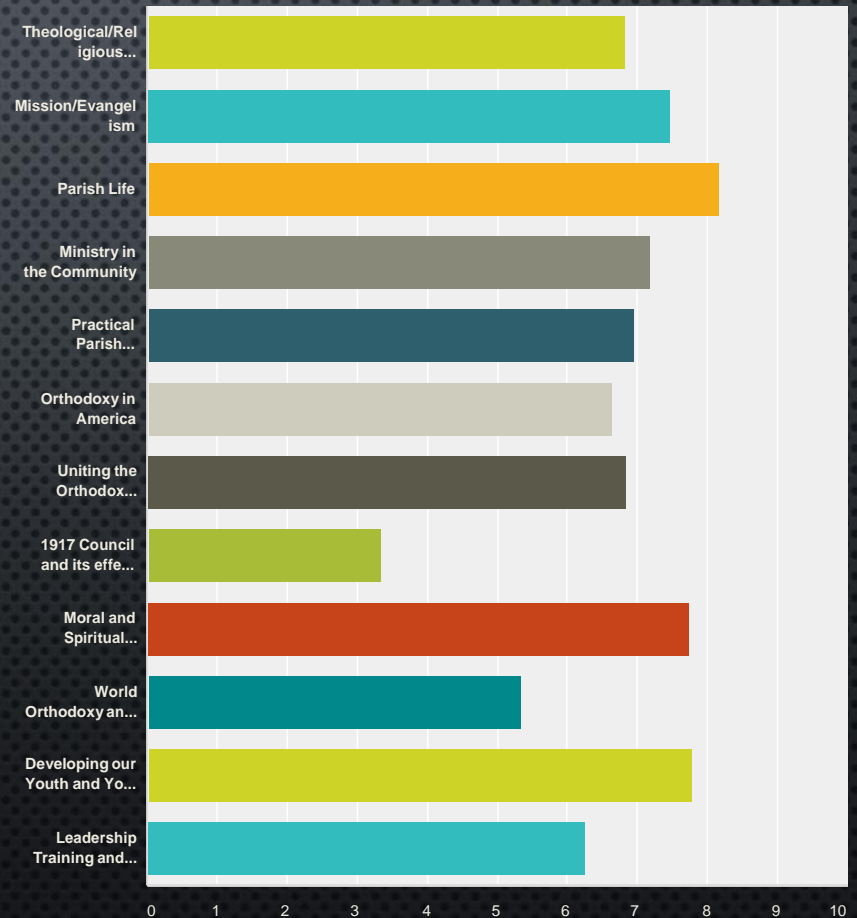
- PROPOSED STATUTE REVISIONS 90 DAYS PRIOR (APRIL 25, 2018)
- PCC TO PUBLISH AGENDA, NOTICES AND ARRANGEMENTS 60 DAYS PRIOR (MAY 24, 2018)
- AGENDA TO BE APPROVED BY HS AND MC AT SPRING, 2015 MEETING (FEBRUARY 2018)
- CHANCERY TO PUBLISH CREDENTIALS AND CERTIFICATION 30 DAYS PRIOR (JUNE 22, 2018)
- REPORTS TO BE DISTRIBUTED BY CHANCERY 30 DAYS PRIOR (JUNE 22, 2018)
- ALL STATUTE CHANGE, RESOLUTIONS, ETC TO BE SUBMITTED 30 DAYS PRIOR (JUNE 22, 2018)

# GENERAL AGENDA FOR AAC

- RESERVATIONS FOR HOTEL CLOSES ON JULY 9, 2018
- TEAM ARRIVAL ON FRIDAY, JULY 20. 2018.
- FOCA CONVENTION SATURDAY, JULY 21 TO MONDAY, JULY 23.
- SATURDAY VIGIL AND SUNDAY LITURGY AT HOTEL.
- COUNCIL TO BE MONDAY TO FRIDAY
- SATURDAY, JULY 28, 2018 TO BE BREAK-DOWN OF SITE

# SOME HIGHLIGHTS FROM LAST AAC SURVEY – TAKEN AUGUST 2015

- 71% WANTED THE AAC IN THE NORTHEAST OR MIDWEST
- 82% THOUGHT IT WAS A GOOD BALANCE ON LITURGICAL SERVICES
- 68% THOUGHT THERE WAS A GOOD BALANCE ON PLENARY SESSIONS AND WORKSHOPS
- 87% WANTED TO CONTINUE THE YOUTH COMPONENT
- NEED MORE TIME BETWEEN PLENARY SESSIONS
- SESSIONS NEED TO STAY ON TIME
- NEED MORE FOOD CHOICES
- VIDEOS WERE A HIT



# SOME CONSIDERATIONS

- DEPARTMENT PRESENTATIONS – PRESENTATIONS SHOULD REVOLVE AROUND THE THEME
- DIOCESAN PRESENTATIONS – HOW CAN THEY INCORPORATE THE THEME WITH PRESENTATIONS
- ALL PRESENTATIONS SHOULD RELATE BACK TO THE THEME
- SPIRITUAL DIMENSION WITH THE YOUTH SHOULD REFLECT THE THEME
- ALL GROUP WORK SHOULD BE THE SAME – DELEGATES SHOULD GO TO WHAT IS NEEDED NOT NECESSARILY WHAT THEY WANT.
- DELEGATES ARE LOOKING FOR THE HOLY SYNOD TO SET PRIORITY AND AGENDA
- DELEGATES NEED TAKE-AWAYS
- NEED TO HAVE CLEAR PRIORITIES FOR THE NEXT 3 YEARS SET AT THE END OF THE COUNCIL
- BACK TO BASICS (CHRISTOLOGY, SPIRITUAL LIFE)
- NEED TO RENEW THE SPIRIT OF THE 1970'S
- PRACTICAL, PRACTICAL, PRACTICAL

# LOCAL COMMITTEES

- LOCAL CLERGY AND LAY CHAIR
- LOCAL SECRETARY
- BISHOP'S WELCOME
- CITY GUIDE
- COUNCIL WORKBOOK
- CREDENTIALS AND REGISTRATION
- EXHIBITS AND DISPLAYS
- FORMAL DINNER
- LITURGICS
- PUBLIC RELATIONS
- SECRETARIAL
- SIGNAGE/WEBSITE
- FOOD AND BEVERAGE
- SOUVENIR BOOK
- YOUTH
- FOCA



# OTHER POINTS

- ASSESSMENTS WILL BE BY DIOCESE
- POSSIBLE VISIT TO FOCUS NORTH AMERICA
- VISIT TO THE OZARK AFRICAN AMERICAN CENTER WITH FR. MOSES BERRY
- MORNING PLENARY AND AFTERNOON OTHER
- YOUTH COMPONENT
- ELECTRONIC REGISTRATION WILL RETURN
- ELECTRONIC VOTING IF WE CAN MAKE THE COST WORK
- EARLY MORNING LITURGY BY MONASTICS/AKATHISTS
- BRING IN ICONS/MONASTIC PRESENCE
- MATUSHKA BREAKFAST/YOUTH BREAKFAST
- OTHER?



**ORTHODOX  
CHURCH in  
AMERICA**

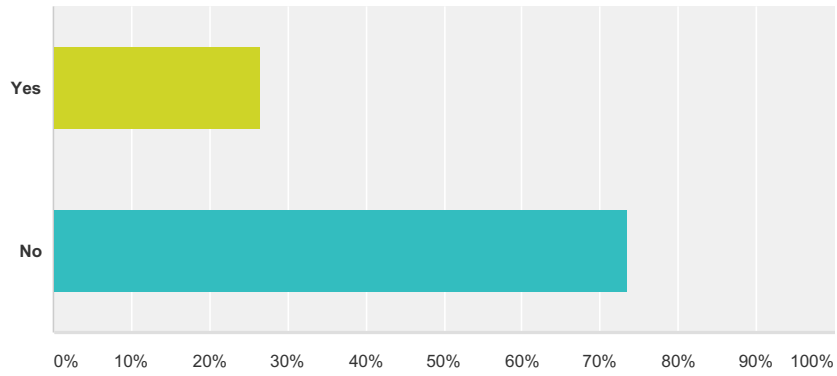
---

QUESTIONS?

WHERE DO WE GO FROM HERE?

### Q1 This was my first All-American Council

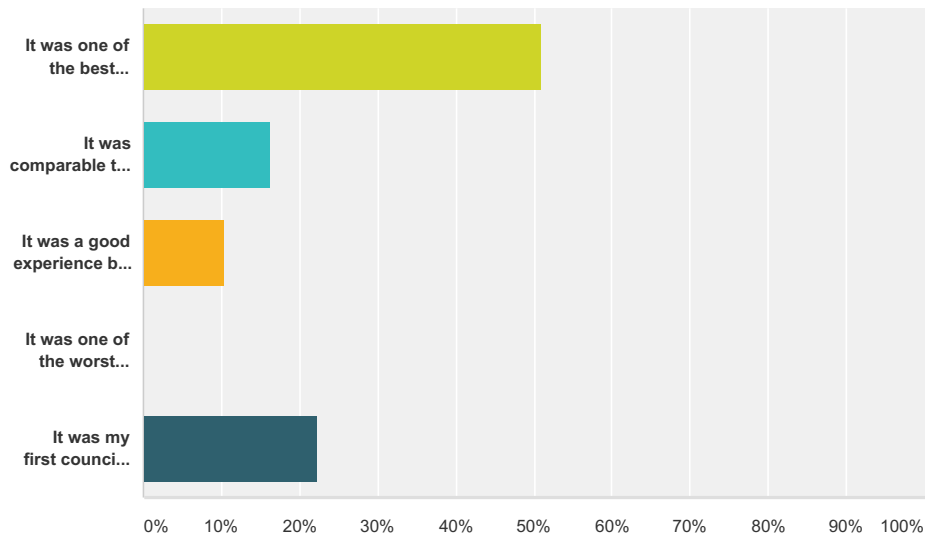
Answered: 204 Skipped: 0



Answer Choices	Responses
Yes	26.47% 54
No	73.53% 150
<b>Total</b>	<b>204</b>

### Q2 What was your overall impression of the 18th All American Council in relation to previous councils?

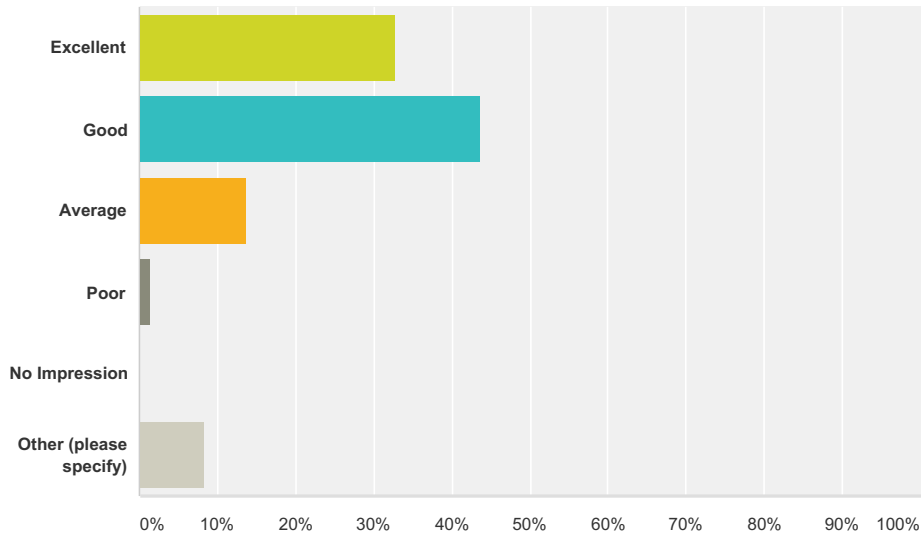
Answered: 202 Skipped: 2



Answer Choices	Responses
It was one of the best councils I have ever attended	50.99% 103
It was comparable to previous councils I have attended	16.34% 33
It was a good experience but needed improvement	10.40% 21
It was one of the worst councils I have ever attended	0.00% 0
It was my first council and therefore I have no way to measure	22.28% 45
<b>Total</b>	<b>202</b>

### Q3 What was your overall impression of the venue in which the Council was held?

Answered: 204 Skipped: 0



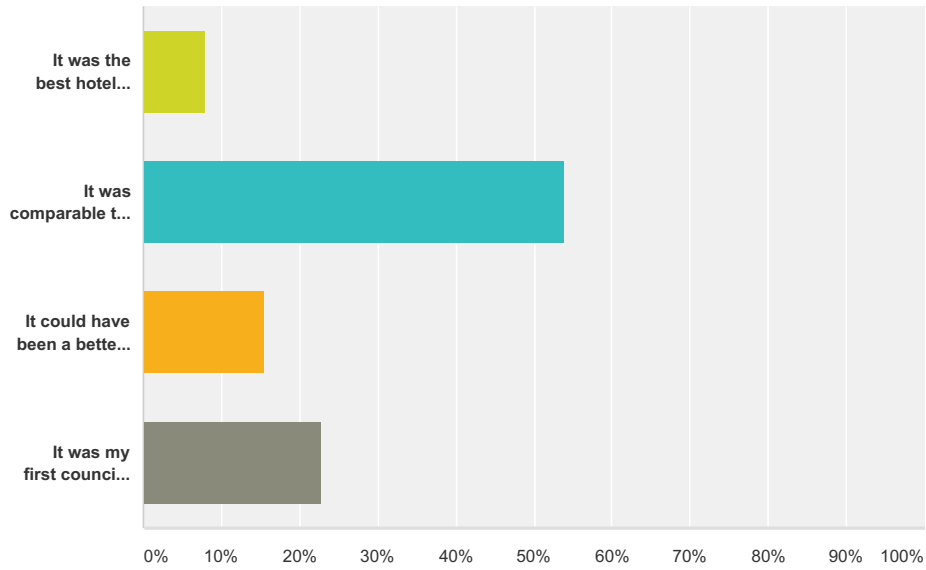
Answer Choices	Responses
Excellent	32.84% 67
Good	43.63% 89
Average	13.73% 28
Poor	1.47% 3
No Impression	0.00% 0
Other (please specify)	8.33% 17
<b>Total</b>	<b>204</b>

#	Other (please specify)	Date
1	It was difficult to find a place to eat in one hour. The places available were expensive . It cost us \$60 a day to eat at Starbucks.	8/28/2015 12:56 PM
2	too cold air conditioning set to low, I was so thankful to have brought my coat! Otherwise very nice.	8/27/2015 9:28 PM
3	A bit dark and "closed".....Seattle was exceptional!!!! Pittsburg seemed similar to Atlanta.	8/27/2015 3:28 PM
4	Very good but daily food was expensive.	8/27/2015 11:59 AM
5	It was good but the check in process was a mess. They did not have our reservation and even though I had the paperwork to confirm this, they still would not acknowledge this had been their error. I helped othres checking in for the next 2 days to overcome errors in their reservation confirmations. Rooms that had been confirmed were not available for those coming in.	8/25/2015 10:07 PM
6	The Banquet food was horrible, How can you forget Bread on the Table. It is the staple of life. I asked for bread and they said you did not order bread to save money.	8/25/2015 8:25 PM
7	Nice facilities, but not fery "family friendly" in regards to finding or affording food.	8/25/2015 7:43 PM
8	In Atlanta, in the heat walking distance from where homeless sleep at night, we were comfortable, well fed, and enjoyed a plethora of religious events and meetings and conferences. Each venue promoted its own emphasis on Expanding the Mission. Many meaningful ideas were put forward. I did find it difficult getting to all the meetings which were available to me. However, I did find a moment when after a light breakfast when I was able to gather a meal and sought out a homeless man who I felt would benefit from it. He was wearing a vest but had no shirt and was carrying a bag with clothing, etc. When I geeted him and offered the food, he thanked me and put down his bag. An old shoe fell out with a rock inside. My estimation was that he needed the rock at night to protect himself. He walked away with the food not looking back. How do we expand the mission, by ministering to others without expecting a return.	8/25/2015 6:05 PM

9	hotel was ok, but food and parking were an unexpected expense.	8/25/2015 5:24 PM
10	Excellent, but so very expensive.	8/25/2015 5:01 PM
11	The venues are over priced and a financial burden to small parishes	8/25/2015 2:57 PM
12	Way too pricey for what it was. No amenities, not even a microwave or refrigerator. No breakfasts, not even simple continental. All added up to costing more for families. Then where was the no free internet thing, too.	8/25/2015 2:33 PM
13	microwave & refrigerator should have been included in room rate	8/25/2015 2:25 PM
14	Wish we could meet in more humble surroundings.	8/25/2015 1:39 PM
15	main room was too small, but all else was great	8/25/2015 11:45 AM
16	needed more seats and tables for sessions!	8/25/2015 11:21 AM
17	Way TOO expensive!	8/25/2015 11:06 AM

### Q4 What was your overall impression of the venue in which the Council was held in comparison to previous venues?

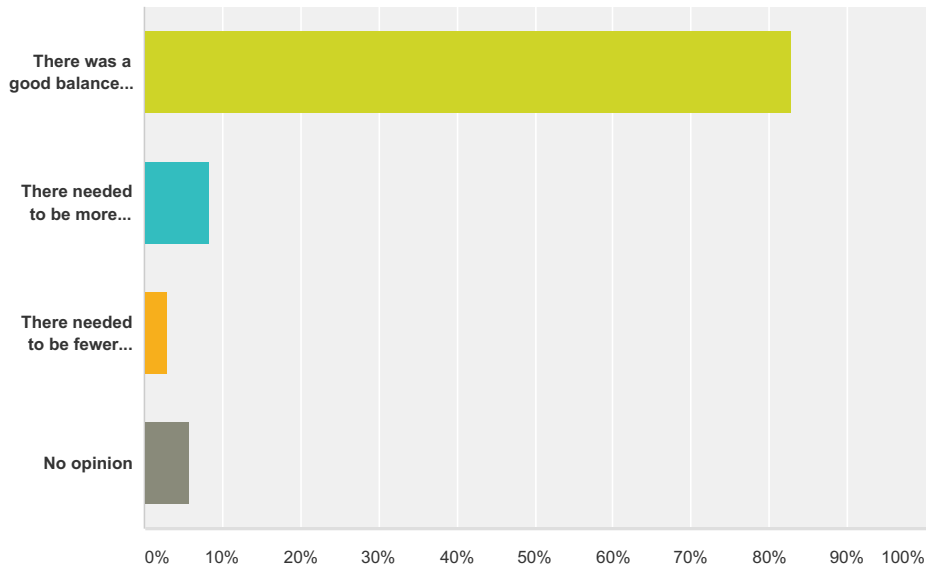
Answered: 202 Skipped: 2



Answer Choices	Responses
It was the best hotel venue	7.92% 16
It was comparable to previous hotel venues	53.96% 109
It could have been a better venue	15.35% 31
It was my first council and therefore I have no way to measure	22.77% 46
<b>Total</b>	<b>202</b>

### Q5 What was your overall impression of the liturgical services held during the Council?

Answered: 204 Skipped: 0

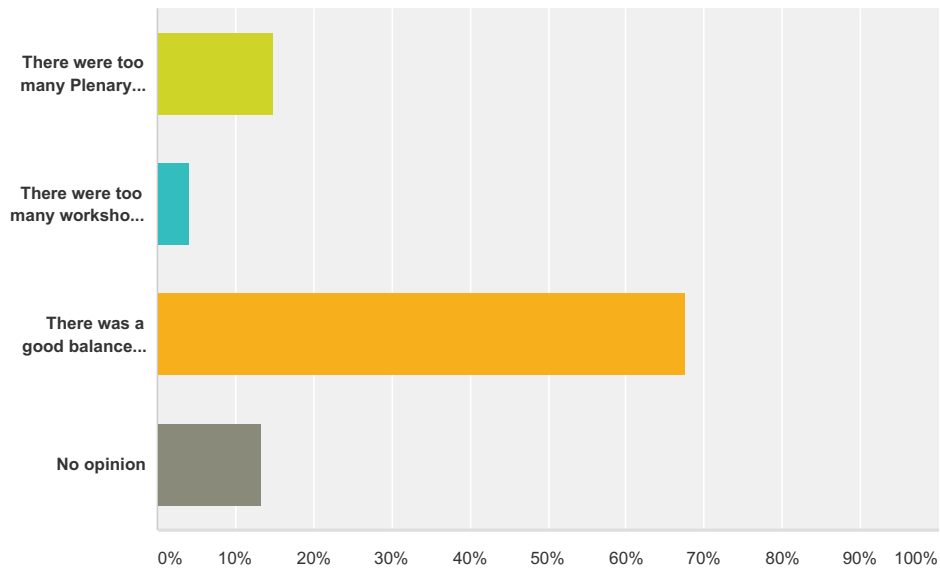


Answer Choices	Responses
There was a good balance of liturgical services	82.84% 169
There needed to be more liturgical services	8.33% 17
There needed to be fewer liturgical services	2.94% 6
No opinion	5.88% 12
<b>Total</b>	<b>204</b>



### Q6 What was your overall impression of the structure of the Plenary Sessions and Workshops?

Answered: 188 Skipped: 16



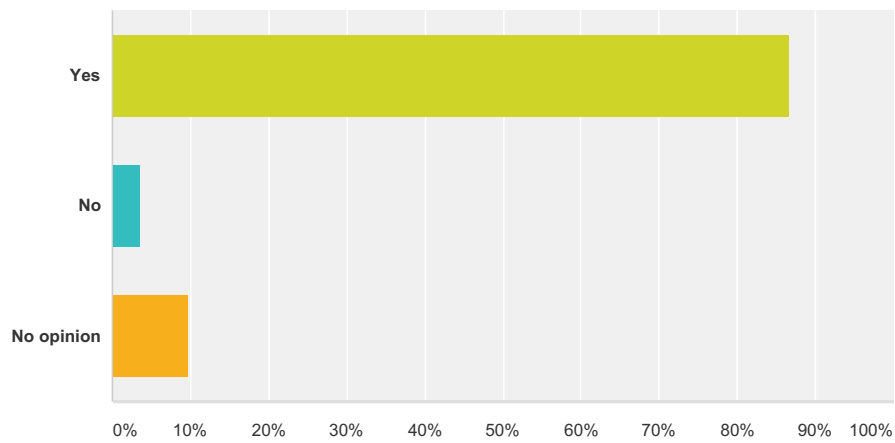
Answer Choices	Responses
There were too many Plenary Sessions and not enough workshops	14.89% 28
There were too many workshops and not enough Plenary Sessions	4.26% 8
There was a good balance between Plenary Sessions and Workshops	67.55% 127
No opinion	13.30% 25
<b>Total</b>	<b>188</b>

#	Other (please specify)	Date
1	Although the balance was reasonably good there was not enough time between sessions. The overall atmosphere and general attitude of the attendees was much better than previous assemblies.	8/28/2015 11:16 AM
2	Time is a factor. Too close together therefore schedule is TOO rushed	8/27/2015 5:55 PM
3	Workshops were excellent.	8/27/2015 3:28 PM
4	schedule changes were difficult.	8/27/2015 12:43 PM
5	Scheduling of all events was never realistic and poorly handled.	8/26/2015 5:05 PM
6	The plenary sessions were necessary, but undisciplined and dragged on.	8/26/2015 5:02 PM
7	Too many reports in the plenary sessions. The diocesan videos were devoid of any real analysis of their over-all status and condition. Workshops were predictable.	8/26/2015 10:29 AM
8	The diocesan reports as videos were both informative and entertaining. They were an excellent way to break up the plenary sessions and allow the diocese to shine in their own personalities.	8/26/2015 9:36 AM
9	Make sure each diocese has a video presentation/report. with a suggested time limit	8/25/2015 10:23 PM
10	Combined with FOCA Convention, the schedule for many of us that week was good, just overlapping at times.	8/25/2015 10:22 PM
11	I was a vendor and did not attend the plenary sessions or workshops.	8/25/2015 10:07 PM
12	The quality of the workshops I attended was "mediocre" at best. Other than Vladyko Paul's presentation, the DRE seems more concerned with how to make a poster than in integrating quality education and youth ministry.	8/25/2015 7:43 PM
13	We didn't attend any workshops due to lack of interest.	8/25/2015 6:31 PM

14	I would have liked to attend workshops where I could digest the content and resume later with questions and answers, in order to understand how ideas can be more fully developed on a parish level.	8/25/2015 6:05 PM
15	Could reduce the number of workshops so that a parish could have good representation at them.	8/25/2015 5:35 PM
16	I believe workshops should be left until Friday, after all reports and business has been completed in the plenary sessions.	8/25/2015 5:13 PM
17	To much time in plenary sessions. Need to allow a 3-4 hour block for visiting the exhibit area.	8/25/2015 4:22 PM
18	Plenary sessions overlapped times for workshops and made it difficult to get to them without feeling like you were on a treadmill.	8/25/2015 3:12 PM
19	Much of the material provided seemed to be filler, too many dry reports; videos are nice but one could watch them on You Tube and save hundreds of dollars	8/25/2015 2:57 PM
20	Some of the workshops were not informative enough, with sermons rather than providing practical suggestions.	8/25/2015 2:53 PM
21	The workshops were extremely good	8/25/2015 2:05 PM
22	I was a vendor/spectator	8/25/2015 1:44 PM
23	the 3-minute timer should be used for the clergy as well as the laity!	8/25/2015 12:51 PM
24	too many workshops, workshops were actually boring, not very interesting.	8/25/2015 12:46 PM
25	Please see my answer to question 10.	8/25/2015 12:28 PM
26	The workshops were not very useful and could be eliminated completely.	8/25/2015 11:40 AM
27	Too many plenary sessions and workshops.	8/25/2015 11:31 AM
28	More variety of relevant workshops	8/25/2015 11:26 AM
29	Conference was too long. Should be compacted into 3 days max	8/25/2015 11:20 AM
30	I would have liked more time for discussion... we often, though perhaps understandably, seemed very focused on just getting business finished...as opposed to having a real dialogue (again...something difficult to do, I understand...especially with 500+ people)	8/25/2015 11:11 AM
31	The workshops could be 90 minutes. That would leave more time in the event that the plenary session exceeded its time allotment. It was not necessary for the workshops to take up so much time.	8/25/2015 11:11 AM
32	There were not too many Plenary Sessions, but a few more workshops would be good	8/25/2015 11:05 AM

### Q7 Should there continue to be a Youth Component at the 19th All-American Council?

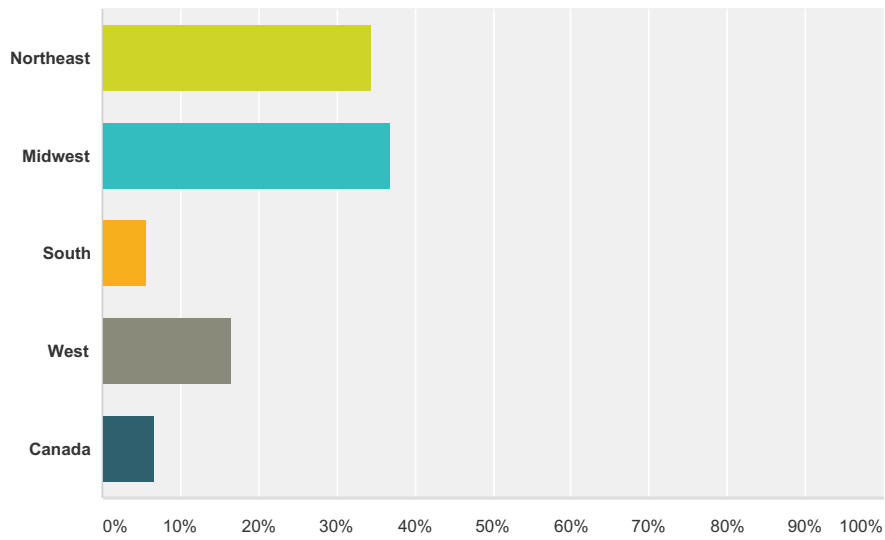
Answered: 203 Skipped: 1



Answer Choices	Responses
Yes	86.70% 176
No	3.45% 7
No opinion	9.85% 20
<b>Total</b>	<b>203</b>

### Q8 Suggestions for a location for the 19th All-American Council to be held in 2018

Answered: 195 Skipped: 9

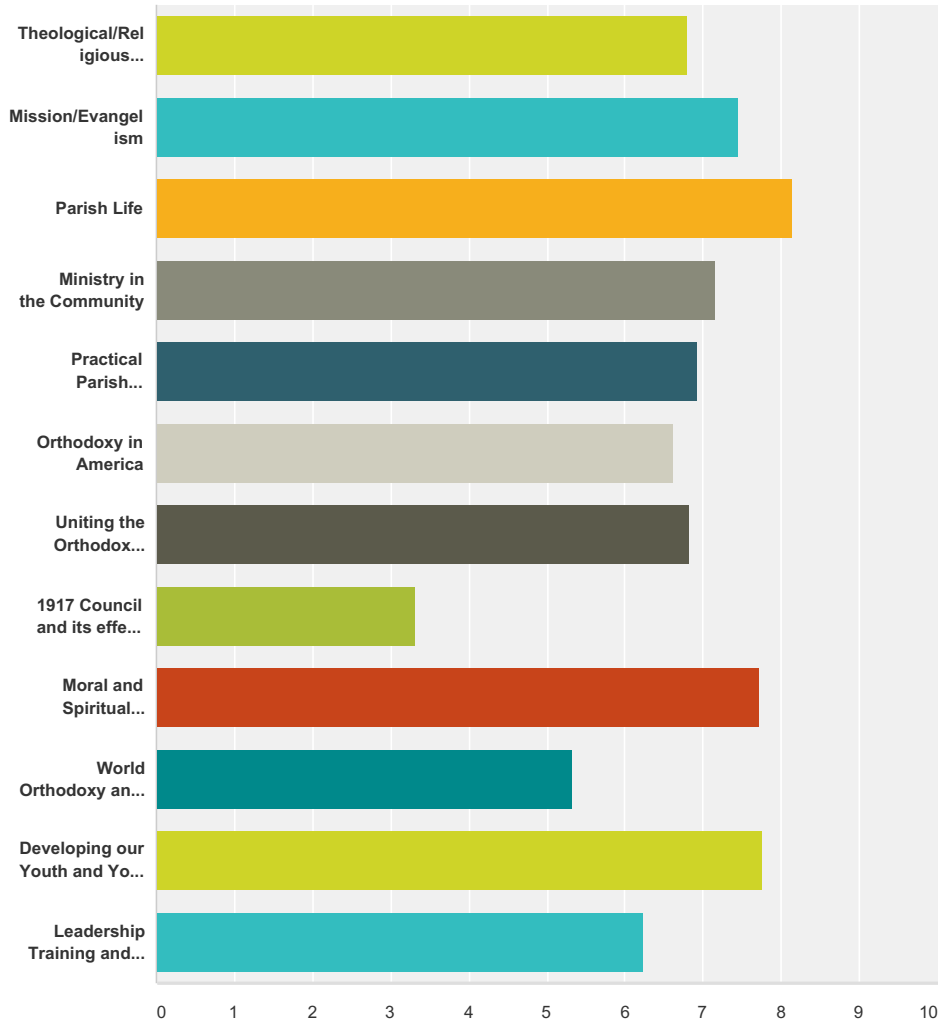


Answer Choices	Responses
Northeast	34.36% 67
Midwest	36.92% 72
South	5.64% 11
West	16.41% 32
Canada	6.67% 13
<b>Total</b>	<b>195</b>

#	Other (please specify)	Date
	There are no responses.	

**Q9 Is there a suggested theme/topic to be explored at the 19th All-American Council?  
Please rank them from most interested to least interested.**

Answered: 188 Skipped: 16



	1	2	3	4	5	6	7	8	9	10	11	12	Total	Score
Theological/Religious Education	6.92% 11	7.55% 12	11.32% 18	11.32% 18	6.29% 10	10.06% 16	9.43% 15	8.81% 14	8.81% 14	8.81% 14	5.66% 9	5.03% 8	159	6.81
Mission/Evangelism	15.66% 26	10.84% 18	7.23% 12	8.43% 14	8.43% 14	9.04% 15	9.64% 16	10.24% 17	4.82% 8	4.22% 7	7.23% 12	4.22% 7	166	7.46
Parish Life	11.45% 19	10.84% 18	12.05% 20	10.84% 18	16.87% 28	10.84% 18	10.24% 17	6.63% 11	6.02% 10	3.01% 5	0.60% 1	0.60% 1	166	8.15
Ministry in the Community	3.01% 5	9.64% 16	12.65% 21	12.05% 20	10.84% 18	10.84% 18	10.24% 17	10.84% 18	7.23% 12	6.63% 11	5.42% 9	0.60% 1	166	7.16
Practical Parish Operations	8.02% 13	9.26% 15	8.02% 13	10.49% 17	9.88% 16	11.73% 19	9.26% 15	8.02% 13	6.79% 11	5.56% 9	8.02% 13	4.94% 8	162	6.94
Orthodoxy in America	6.55% 11	5.95% 10	10.12% 17	8.93% 15	10.71% 18	7.14% 12	8.93% 15	10.12% 17	10.12% 17	14.88% 25	3.57% 6	2.98% 5	168	6.61

Uniting the Orthodox Churches in North America	<b>16.27%</b> 27	<b>9.64%</b> 16	<b>7.23%</b> 12	<b>7.23%</b> 12	<b>5.42%</b> 9	<b>6.02%</b> 10	<b>1.81%</b> 3	<b>8.43%</b> 14	<b>10.84%</b> 18	<b>13.86%</b> 23	<b>6.63%</b> 11	<b>6.63%</b> 11	166	6.82
1917 Council and its effect on the Church in America	<b>1.94%</b> 3	<b>3.87%</b> 6	<b>4.52%</b> 7	<b>3.23%</b> 5	<b>0.00%</b> 0	<b>3.23%</b> 5	<b>3.23%</b> 5	<b>3.87%</b> 6	<b>5.81%</b> 9	<b>10.97%</b> 17	<b>15.48%</b> 24	<b>43.87%</b> 68	155	3.32
Moral and Spiritual Challenges in the Modern World	<b>15.52%</b> 27	<b>11.49%</b> 20	<b>10.92%</b> 19	<b>10.92%</b> 19	<b>8.05%</b> 14	<b>7.47%</b> 13	<b>11.49%</b> 20	<b>2.30%</b> 4	<b>5.75%</b> 10	<b>4.60%</b> 8	<b>6.90%</b> 12	<b>4.60%</b> 8	174	7.72
World Orthodoxy and the Place of the Orthodox Church in America	<b>6.88%</b> 11	<b>7.50%</b> 12	<b>6.25%</b> 10	<b>5.00%</b> 8	<b>5.63%</b> 9	<b>3.75%</b> 6	<b>3.75%</b> 6	<b>5.63%</b> 9	<b>11.25%</b> 18	<b>13.75%</b> 22	<b>21.88%</b> 35	<b>8.75%</b> 14	160	5.33
Developing our Youth and Young Adults	<b>9.47%</b> 16	<b>16.57%</b> 28	<b>10.65%</b> 18	<b>11.24%</b> 19	<b>10.06%</b> 17	<b>8.88%</b> 15	<b>7.10%</b> 12	<b>7.10%</b> 12	<b>7.10%</b> 12	<b>2.96%</b> 5	<b>5.92%</b> 10	<b>2.96%</b> 5	169	7.76
Leadership Training and Development	<b>7.78%</b> 13	<b>4.19%</b> 7	<b>7.19%</b> 12	<b>7.78%</b> 13	<b>8.98%</b> 15	<b>10.18%</b> 17	<b>10.78%</b> 18	<b>11.98%</b> 20	<b>8.98%</b> 15	<b>5.39%</b> 9	<b>5.99%</b> 10	<b>10.78%</b> 18	167	6.24

### Q10 How could the All American Council be improved in the future? Is there any comments you would like to make to assist the Chancery is planning the next AAC?

Answered: 123 Skipped: 81

#	Responses	Date
1	Was informed that the first day was not that important to be there. Arrived later the first day. Found it difficult to attend the workshops and meet with people I needed to meet with. The survey above is a bit confusing - rated 1 as least interested and 12 as most interested.	8/29/2015 3:23 PM
2	Please continue to have programs for Deacons. We need to share in the training as well as Priests.	8/29/2015 12:26 PM
3	Keep on schedule. Allow realistic time frame for completing Plenary Sessions. START ON TIME.	8/28/2015 8:40 PM
4	A more serious master of ceremonies. More hierarchs from over seas	8/28/2015 1:15 PM
5	Allow more time for breakfast lunch, dinner. More affordable food options. We could not walk to the peach place for our food and have time to eat it and walking there was not an option for us.	8/28/2015 12:56 PM
6	Allow more time between sessions. Better access to reasonably priced food or allow more time. Fewer liturgies (non-hierarchical) at later time.	8/28/2015 11:16 AM
7	Get all resolutions addressed earlier so no chance of running out of time.	8/28/2015 10:17 AM
8	Stay on schedule, even if it means reducing the number of presentations, in order to allow sufficient time for the workshops.	8/28/2015 1:37 AM
9	There seemed to be a lot of redundancy. Each speaker took time greeting everyone, it seems this could be done at the beginning. One greeting then each speaker stating their name. The reports from the dioceses and agencies too long. Maybe just one or two outstanding items. The plenary sessions tended to be boring and tedious. Granted the business of the church needed to be done and the discussions regarding the by-laws and the change in method supported needed to be dealt with and these sessions were not tedious. Due to the plenary sessions going over their allotted time then not enough free time. The opening remarks by Met Tikon most excellent; the speech by the Met from the Ukraine (?), very difficult to understand his accent. Could not catch most of the speech. I loved the Liturgies, esp the 6:00 AM ones. The workshops were great, very helpful. Thank you for this opportunity to comment!	8/27/2015 9:28 PM
10	Election of metropolitan council members was handled v poorly.....instructions confused, no biographies, does not give a good organizational impression...Continue with wonderful video reports of diocese activities! No head table for bishops at banquet.....too much isolation of bishops...their days too long and exhausting....	8/27/2015 3:28 PM
11	Barbara and Michaela were so organized and such a blessing! They were awesome! Utilizing local churches if they can handle the volume of people and in that vein using buses for transport to these churches. Visiting all the parishes in the vicinity. Our parish family had done a great sprucing up for a potential visit..... yet were not visited. Get hotel rooms (overnight) for the youth and teens so they can be together for more than 2 hours. chaperoned of course! This was mentioned to me several times, especially by the teens. Great that all the hierarchs were at the clergy wife's luncheon. Continue to include the retired matushki and also those who are widowed. Make the day be 48 hours so we can do all the things we want to and need to do! :) thanks for asking. It was wonderful! God bless. Mother Terri Smith in Atlanta	8/27/2015 12:43 PM
12	Don't underestimate the benefit of setting the room configuration of the Plenary sessions as classroom style. Really added to helping participants focus on the job at hand. Regarding the Divine Liturgies, I understand they were added at the request of the attending monastics. I attended 2 of 3 and thought they was a terrific addition. However, they were simply too early which led me to become extremely exhausted. 7am would have been better and the akathists moved to the evenings. The plenary sessions could have been tightened up to allow for a more reasonable liturgy start time. Explaining my lower hotel rating: There were some nice things about the hotel. Location, convenience to the food court. However several delegates remarked of the presence of a mold smell in the ballroom. It got worse as the week progressed. Also, please negotiate more reasonable prices for on-site dining. \$30 breakfasts for those unable to walk to another location were ridiculous, even for downtown hotel standards.	8/27/2015 12:02 PM
13	Focus on priest/parishioner relationships. Overall, this latest AAC was wonderful.	8/27/2015 11:59 AM
14	Please remind those who are to give reports on a specific topic that they are to be "reports" and not a lecture or sermon. That would move the sessions along quicker.	8/27/2015 7:46 AM
15	Consider ways to bring input/wisdom in from retired clergy	8/26/2015 10:05 PM
16	Pilgrimage to local monastery	8/26/2015 8:04 PM
17	Nametags should be in bold and easier to read; Time schedules should be kept. Venue has to have more inexpensive options for meals that can be accessed in the time frames allowed. Consider catering in box lunches on some days. Companies do it all the time. Secretarial services were awesome.	8/26/2015 6:54 PM

18	Consider better representation from Canada and Mexico. I strongly believe that there should be a minimum of 2 bishops from each country at these meetings for proper representation. Each should give a report at each ACC meeting as to the progress of the Church in their perspective country and identify areas in need of support from the Oca. Unity must begin here, at these meetings and it must be evident to all. Proper representation and involvement from each Country is essential to a successful future, for the AAC Meetings and the OCA as a whole.	8/26/2015 5:34 PM
19	The scheduling made it almost impossible for those facilitating a workshop to attend any workshops.	8/26/2015 5:32 PM
20	More 'free time' between sessions & workshops. Schedule is too crowded.	8/26/2015 5:29 PM
21	The 18th AAC was fruitful and enjoyable. The 19th AAC can be better still, if more free time, more workshops, and fewer plenaries, are built into the agenda.	8/26/2015 5:15 PM
22	Plan timing better and leave a realistic amount of time for scheduled events.	8/26/2015 5:05 PM
23	Just try to keep to a tighter schedule. Respect the delegates' limited time, energy, and focus.	8/26/2015 5:02 PM
24	We should plan to make better use of media resources available - to allow parishes which can't/don't send delegates to also participate as much as possible in the workshops of the Council. Instead of spending money on travel and hotels, use funding to bring the Council to every parish community and open it not to just few delegates but to every parish member who would like to benefit from the workshops and educational venues of the Council. In other words, do a "reverse" Council - bring the Council to every parish community rather than bringing a few delegates at great expense to a Council location.	8/26/2015 1:37 PM
25	Please adhere to the time requirements, or allow more flexibility.	8/26/2015 1:36 PM
26	The Church needs to address Her role as the culture war rages and polarizes our country even further. At no point did the AAC even allow room for discussion on these topics.	8/26/2015 12:56 PM
27	Overall, the committee does a wonderful job. Always include children/young adult activities. More iconographers bringing their work to sell, especially smaller hand written icons. I would buy immediately for my children and grandchildren.	8/26/2015 11:10 AM
28	We need to continue to develop our young adult leadership to curb and correct the issue of morality in this world. Certainly the coming together of all the Orthodox Churches in North America is a big challenge but one that needs to be accomplished. All Jurisdictions need to come together. AMEN!	8/26/2015 10:32 AM
29	I would suggest a more compact three-day Council.	8/26/2015 10:29 AM
30	I liked the inclusion of the FOCA convention immediately preceding and overlapping the AAC, please continue to do so. Future sites: Detroit (convenient for Canada) Metropolitan DC area	8/26/2015 7:36 AM
31	I very much enjoyed and was spiritually encouraged by the large icon of the Mother of God on the far wall of the ballroom, but I sat over next to it at just about every session and the guide wires they used to attach it for support were continual safety hazards with everyone walking through because the tables were all the way against the face of the icon with no path for foot traffic between it and the tables. I would suggest setting up tables in such a way that people can get through without having to duck under wires like that. While I was certainly somewhat concerned about the icon itself, I was more concerned for those who dared to negotiate around it. Several older clergy almost injured themselves trying to do so. The safety concerns I witnessed were primarily during the Plenary Sessions, but also during the liturgical services.	8/26/2015 6:17 AM
32	- I suggest a location in western Canada or the west coast as a way to get more people from Alaska and Mexico to come - 'Organized' opportunities for spouses of delegates and Matushki that are not delegate to 'mingle' and go places during Plenary sessions.	8/26/2015 4:27 AM
33	The Plenary Sessions needed larger tables - much too crowded.	8/26/2015 2:07 AM
34	Shorter reports, particularly from departments that issued written reports prior to the Council. Many were way, WAY too long. As in "I broke out Sudoku on my phone" long.	8/26/2015 1:13 AM
35	Please provide breakfast (7:00- 9:00) and lunch 12:00-2:00 as part of the scheduled events.	8/26/2015 12:15 AM
36	Visibility in the community	8/25/2015 11:47 PM
37	I liked the fact that more Liturgies were added. I didnt mind the early start. There does need to be a realistic accounting for how long services will take and when to start the first plenary session of the day, so that people can get something to eat after receiving the Eucharist.	8/25/2015 11:37 PM
38	It was scheduled too tightly. No time left for other activities or meetings. Time difference with the West Coast time added to this inconvenience.	8/25/2015 10:56 PM
39	Make the names on the name tags larger Combine it again with an FOCA national convention Have an international guest speaker like Metropolitan Hilarion (Alfeyeff) or Metropolitan Kalistos (Ware)	8/25/2015 10:23 PM
40	Right idea with involving the FOCA, just logistics was an issue. The first time is the hardest and I know it will only improve. The AAC was and will always be a wonderful event and a sincere thank you for all of your hard work to pull together such a monumental task.	8/25/2015 10:22 PM
41	The location was ideal in that it did not require rental cars or anything of the like, which I'm sure saved money for many parishes. Similar locales would be good from a logistical standpoint.	8/25/2015 10:00 PM
42	Clergy chair was a poor choice. Video reports from dioceses were excellent.	8/25/2015 9:30 PM



43	Have real food at the Banquet, Have Bread at the Table, Have Wine for the meal, The meal was the worst I ever had in my life.....If you want to save money don't do it at the Banquet, everyone was talking about it...someone messed up real bad...	8/25/2015 8:25 PM
44	This is a major event in the life of the church and you have done a fantastic job in coordinating such a large council.	8/25/2015 8:14 PM
45	Less talk about money. More talk about Jesus. Less Jonah bashing.	8/25/2015 6:31 PM
46	The emphasis on the spiritual development that overflows into outreach to our communities by overturning the status quo.	8/25/2015 6:05 PM
47	Have it in a better neighborhood. Atlanta is not a nice place. Did not feel safe while outside the hotel.	8/25/2015 5:27 PM
48	As difficult as it may be, staying on schedule is a top priority. So scheduling should be realistic. The schedule on the Hierarchical Liturgy was unrealistic on paper.	8/25/2015 5:26 PM
49	More time to simply socialize with each other, and a way to make those not familiar with each other to spend time together. Not same old clicks.	8/25/2015 5:24 PM
50	The reports of the various departments were at bit too long. The final recap of the AAC as a video was great, there was no need to follow it with a verbal recap.	8/25/2015 5:13 PM
51	Start the first plenary session around Noon on Monday as most delegates have arrived already, especially those holding their respective diocesan assemblies. There was nothing to do between the close of our diocesan assembly and the opening, evening plenary session.	8/25/2015 5:13 PM
52	Must keep costs down for delegates. Retired clergy should be honored and have voice. It is important to recognize our elders and their years of service.	8/25/2015 5:01 PM
53	The time schedule of sessions needs to be issued earlier in order to facilitate travel plans.	8/25/2015 5:01 PM
54	We appear to be in pretty good hands.	8/25/2015 4:57 PM
55	It would be helpful to include on-site children's activities in which younger children may participate. This would enable more parents to attend the sessions and workshops.	8/25/2015 4:44 PM
56	no comments	8/25/2015 4:33 PM
57	Have coffee each morning in the exhibit hall, exhibitors would be happy to pay a bit more if this was done to attract people to the hall. Have a cocktail reception in the exhibit hall on one evening, again to attract people to the hall.	8/25/2015 4:22 PM
58	The AAC could be 2 days. The presentations were simply padding that could be eliminated. The panels weren't that appealing. A better AAC would have a very practical focus on what we can to do evangelize and build up parish life.	8/25/2015 4:15 PM
59	It would be good to have this survey given to people before they leave, and while things are still fresh in their minds. I recall telling someone at the end of the last session that it would be nice to have a survey available, because there were several things I wanted to say. But, my old age has made me forget what they were now.	8/25/2015 3:42 PM
60	Some reports, though good, were too long which caused scheduling troubles. I mean this in the kindest way - reports should be reports and not occasions for sermons or sermonettes or expressions of thanks and gratitude.	8/25/2015 3:19 PM
61	Shorten content of plenary sessions allowing for more time to eat or have some kind of brown bag availability to purchase for breakfasts and lunches .	8/25/2015 3:12 PM
62	Too much talk about themes, needless involvement of everyone in dry reports. There needs to be more constructive action. It is nice to meet and talk, but I wonder what the long term fruit will be? The AAC is a huge financial undertaking, are we seeing productive fruit? Is it worth the collective church spending hundreds of thousands of dollars? The whole concept needs to be revisited. Will this past council do anything, in any concrete and objective manner, to grow the Church? Or did we spend hundreds of thousands to just meet together and talk. The answer is not more themes and talks and reports and voting. Excuse small parishes from the AAC, have them rather put that money to a productive local evangelical goal, or some such objective and locally beneficial mission which will hopefully add growth and something of profit. There was very little of direct profit or help for the local parish, and more workshops are not the answer.	8/25/2015 2:57 PM
63	Have workshop handouts available with positive suggestions on how to implement activities to facilitate the goal.	8/25/2015 2:53 PM
64	This one seemed to be very good. We will be using a RC retreat house for our upcoming 53rd Diocesan Assembly in New England. I'd like to see us use a noncommercial site for an AAC.	8/25/2015 2:49 PM
65	On-line bulletin board to facilitate mutual contact between attendees who may not even be aware of one-anothers attendance at the council until the Thursday banquet.	8/25/2015 2:46 PM
66	A more family-friendly venue. Yes, must be big enough for the event. But this did not work (no fridge, no microwave, no complimentary breakfasts, no free WiFi). And, need YOUNG ADULT activities, not just the vitally important ones for younger youth.	8/25/2015 2:33 PM
67	Continue and start the travel assistance program for our brethren who would like to attend the AAC but cannot afford travel and room early, not in the last few months of the beginning of the AAC. Start your campaign now.	8/25/2015 2:27 PM
68	It was the best AAC. Do need some coffee/tea to be provided at sessions.	8/25/2015 2:25 PM

69	Since Orthodox unity is a topic of discussion, would it be possible for Metropolitans/Archbishops/Bishops from other jurisdictions to attend the next AAC?	8/25/2015 2:20 PM
70	Even more electronic communications. This was nice not having to use so much paper.	8/25/2015 2:02 PM
71	Should fit the material for the plenary sessions into the time available, so to finish on time. Cutting off floor speakers, while understandable, could have been more gently handled.	8/25/2015 1:55 PM
72	Provide at least a few hard copies of important topics to be discussed since not all may have access to internet. (I saw many with empty binders!) Also more input should be allowed from delegates. Send questionnaires on topics earlier to parishes? Overall it was a wonderful Council.	8/25/2015 1:54 PM
73	8 am Divine Liturgy, daily, served by a priest and 1 or 2 deacons. 1 Hierarchical Divine Liturgy. Less Plenary sessions. Videos on Diocesan Life could be shown at booths in the exhibition hall. Solicit more vendors to participate--charge them only what the hotel charges the OCA for the space and don't try to make profit on it. More workshops. The two I attended at this last AAC were excellent (Frs. Voytovich and Parker). More social events/time for socializing. Complimentary continental breakfast after each morning liturgy. Complimentary coffee/soda during plenary sessions/breaks. Proper grammar used in surveys--Question 10. ARE there any comments ... not IS there any comments ... Have a separate BIG EVENT for youth tri-annually and don't cram it into the AAC. Don't have children telling the Church what they DREAM the Church should be--it's impious and irritating! If I think of anything else I will email Fr. Eric. Igumen Joseph (Hoffman)	8/25/2015 1:50 PM
74	Being one of the younger delegates at the council, I think it might be beneficial to put together (officially or unofficially) another young adult meet and greet. A group of 25+ got together for dinner and ended up hanging out for nearly 5 hours one night. It might be a good way to get more young adults to participate (either as delegates, observers or volunteers).	8/25/2015 1:43 PM
75	Maybe a list of acceptable etiquette practices, especially for those lay members who don't see the higher priests and bishops on a regular basis.	8/25/2015 1:42 PM
76	Very impressed and good job overall. Discouraged to see the drinking (I'm not against drinking, per se). Wish we could meet in less "worldly" surroundings. A little taken aback by one comment of moderator to a priest who asked a legit. question from the audience.	8/25/2015 1:39 PM
77	To be honest with you Father the only thing that was unsettling for me (and a few others) was the promotion of our (the United States) military industrial complex. I don't believe we should be standing flags of ANY country in front of an iconostasis. I support you and thank you for all you have done. In Christ , Rdr Gregory Hayda.	8/25/2015 1:19 PM
78	Expense is always a big factor I hear from most people. Although I enjoyed the venue, it was expensive from an average sort of person's expectation. Ye, there was a lot of junk food available in close distance but eating healthy was a challenge and there were no refrigerators in rooms to help store some healthy fruits, cheeses etc.	8/25/2015 1:16 PM
79	The hotel and ballroom were really great for the sessions. Please choose a cooler location if the AAC is going to be in the middle of July again. I think we should rotate the location by diocese so there is no question about who will be hosting it and everyone gets a turn. As someone who was asked to serve on a committee and offer workshops I found that I wasn't able to do both, though I wanted to. I would ask for that to be factored in for the future. Also, there were so many wonderful workshops, but some of them with similar themes probably drew people away and made the workshops have poorer attendance than they might have otherwise. For instance, I would suggest having only one "youth/college" workshop in a time slot so it doesn't conflict with another at the same time. I also really think that what was done for IOCC was amazing and that we, as a Church, should offer a collection to some similar agency of the Assembly as part of our meeting together each year and have a goal in mind of how much we want to raise. This would certainly help our cause in achieving jurisdictional unity. Lastly, I know the AAC is on a tight budget, but the dinner for everyone at the end was a little embarrassing. It would have been nice to have at least soda or bread with the dinner, instead of just water. Thank you for all of your hard work and for what was really an enjoyable and energizing experience!	8/25/2015 1:02 PM
80	Incorporate more planning and Leadership by/with the Fellowship of Orthodox Christians in America especially in regards to the youth component. It sounds to me that the few who spoke for the youth have no knowledge of the organization. Most of what they asked for is already in-tacked through the fellowship (dancing, ethnic involvement, sports tournaments, etc.).	8/25/2015 12:57 PM

81	<p>English is important: "ARE there any comments you would like to make, etc..." - I appreciate the tremendous amount work that goes into orchestrating an AAC; but I left wondering what the goal was and if it was achieved. For some, it's a nice reunion and that's fine, but there has to be some higher purpose. I enjoyed the videos from the dioceses, but I wish I could have left Atlanta understanding the Church's position on some of the terrifying events happening both within and outside of the US. Not just ISIS, but the unraveling of US society with attacks on Church, family, marriage, even the most basic elements of life: like male- and female-ness! These things are frightening and I know that our Church is virtually the lone voice crying in the wilderness when it comes to God's truth in these matters....but I heard nothing at all about these things at the AAC. Furthermore, how many more years will we hear that the unity of Orthodox in America is going to be taken up by Metros and bishops....and what progress has been made thus far? None, it seems. We Orthodox in America are under moral and spiritual attack RIGHT NOW and can't afford to be splintered! Yet, again, no real mention of this was made at the AAC...and the opportunities were there! Particularly in regards to youth! Consider: Our children and young people already share a culture: They are all Americans!/Canadians! Much of the prior ethnic ghetto mentality has already passed away. Our children are sitting next to each other in school, having no idea that the person next to them is Orthodox! (It's not a subject kids - esp. teenagers! - would bring up on their own!) And regardless of their jurisdictions (which they couldn't care less about) they are all under the same attacks: Church is stupid; marriage is not necessary; do whatever makes you feel good! And 800 committed Orthodox adults sat in Atlanta, debating whether language from the original 1970 statutes should be changed. How long can we have nice meetings while we ignore the wolves growling and gnawing at the door, ready to literally devour our children and young adults? Doesn't God expect us to be vocal and take some action and leadership in this? Aren't we supposed to speak up for truth? I certainly would have appreciated some direction and encouragement on these things. I was stunned to hear at the last plenary session that the youth component to the AAC had been suspended for 10 years! That's the BEST part! In 2005, I took my then 15-yr old daughter and 13-yr old son, at my expense - "kicking and screaming" in protest - to the AAC in Toronto, although I was not a delegate. And they had the most fantastic experience, actually asking to stay with the group longer every night and sad when it was over! It was the first time they actually stood in a CROWD of their Orthodox contemporaries! If you eliminate the youth component...don't even bother with an AAC! Overall, I had a nice time and enjoyed myself in Atlanta...but I really don't know how much of real substance and relevance was actually accomplished.</p>	8/25/2015 12:51 PM
82	<p>Fine tune the web, realizing delegates will be in the sessions with internet access, and make it easier to find the relevant and information needed on a timely basis, especially resolutions that may be changing in the course of the day.</p>	8/25/2015 12:50 PM
83	<p>This was a great council, well planned and well executed. But the hotel was understaffed and over-priced. They made up for the discounted rooms by overcharging for food and parking. The next council should be in a location that is centrally located and easily accessible, not like Parma, Ohio. And I personally think we could do liturgy every morning and vespers every evening. Thanks!</p>	8/25/2015 12:49 PM
84	<p>Food at the Hilton was ridiculously expensive. The \$75 banquet meal was terrible and skimpy. There was little time to run to Peachtree Commons for meals in between sessions. All meals for everyone at the council should be taken in common. The meals don't have to be fancy. We need an Orthodox facility and not a hotel for our councils. We need to start saving to buy or build our own facility, like Antiochian Village, only big enough to accommodate 1000 people. The OCA should have looked into this and done this a long time ago.</p>	8/25/2015 12:47 PM
85	<p>Spent 4 days in a hotel just to vote on about 3 to 4 resolutions that could have been accomplished in 1 to 1.5 days. What a waste of valuable time/costs of having all the 'filler' material in between voting on the resolutions.</p>	8/25/2015 12:46 PM
86	<p>The hotel was nice but not great. The Marriott next door and the Hyatt were awesome compared to the Hilton. Plenaries were too long, should be shorter. No time for dialogue it was all one way lecture. Very boring. No time for R and R, the mantra about clergy self care was said quite often but how many of us took time to visit the local museums, took a long walk, or had time with family, it was either A. services B. Plenaries or C. Workshops. Has anyone given the thought to have maybe a half day of meetings and then let us go out and actually "enjoy" the local sites and attractions? Everything was too programmed, need more time to just "be" and to share.</p>	8/25/2015 12:46 PM
87	<p>This was a very good AAC. The tone was wonderful and I feel that in large part, it was due to our wonderful new Metropolitan and his staff.</p>	8/25/2015 12:40 PM
88	<p>Make sessions realistic in time. Allow for slight overages in time. Allow longer breaks between times. Choose places that have plenty of restaurants nearby</p>	8/25/2015 12:29 PM
89	<p>I think one of the biggest strengths of the AAC is an informal one: the community we revive by gathering together. I worry that by letting plenary sessions run far over time, we cut into that all-important informal fellowship that sparks the conversations that fuel our Church. I think in the future, we should look to streamlining the plenary sessions as much as possible. For example, the video updates from the dioceses were interesting, but they were much longer than necessary. Much of what was said in the plenary sessions could be accessed online; the in-person conversations could not be. I understand how important the plenary sessions are for church business and church unity, but I think that by redistributing more time for workshops, discussion groups, and informal fellowship, we would improve attention spans in the plenary sessions and increase the Council's influence on the life of the Church. Thank you all for your time and hard work: it was a very enjoyable experience, and I look forward to the next!</p>	8/25/2015 12:28 PM
90	<p>Frankly, it's just gotten too expensive.</p>	8/25/2015 12:28 PM
91	<p>keep the same line like in Atlanta. I was a local Priest and I was pleased with coordination.</p>	8/25/2015 12:23 PM
92	<p>I would appreciate more unscheduled time to be with other clergy informally. The only free time was at night, and because liturgy was at 6 am it created a situation where free time completed with the Divine Liturgy.</p>	8/25/2015 12:18 PM
93	<p>Need to have wi-fi available at plenary sessions.</p>	8/25/2015 12:16 PM

94	Please keep daily Liturgies. More time for brotherly interaction between clergy.	8/25/2015 12:14 PM
95	This conference was great with a sense of spirituality and of optimism. Consider considering the theme: this time "Fulfilling the Great Commandment"--making disciples, by baptizing (sacraments), teaching and observing. Also, the videos for giving snapshots into the on-going life of each of the dioceses was very powerful.	8/25/2015 12:10 PM
96	Most important is to leave open Monday morning for arrival. This means not even Diocese meetings. Arriving on Sunday means an extra nights lodging for the parish to pay for and If the venue is a great distance the obtaining of a fill-in priest for Sunday Liturgy. Do not schedule anything after 7 PM. Have more workshops.	8/25/2015 12:07 PM
97	Invite a world-renowned orthodox speaker to give an inspiring presentation on the spiritual life. Perhaps someone like: Archimandrite Zacharias Zacharou or Metropolitan Athanasios of Limassol.	8/25/2015 11:59 AM
98	This was my 4th AAC. The Liturgical Services particularly the Hierarchical DL are always uplifting but a realistic time should be apportioned. The fact is that it does take 3 hours for the HDL. It was problematic when trying to meet with friends outside the sessions to have the schedule altered sometimes by more than a hour. The first plenary session scheduled on Monday evening has to go! There were a number of attendees who had travel issues shell-shocked by jet lag then having to attend an evening session - torture!	8/25/2015 11:57 AM
99	More time for workshops. I only got to go to one. Workshops should be 2 hours, not 4 hours long. Also, more social time with our bishops. Other than that, great council!	8/25/2015 11:53 AM
100	Disability Access - using a generally accessible venue doesn't help if then set up our part of the situation poorly. My email is tokahfang@gmail.com, and I have a zillion thoughts on this matter if you are interested in hearing them. Particularly, though, the seating, entrance, and counting system for the Plenary Councils gave the door guys headaches/confusion or made an entire row people move just so I could come in through the correct door in a wheelchair as a lay delegate. I imagine folks with walkers, etc had similar challenges.	8/25/2015 11:50 AM
101	Departmental reports condensed to bullet point formats of 3 pages or less, making the contents far more manageable and digestible for us delegate - perhaps setting up a session where delegates and other could meet with whatever departmental folk(s) they wishes to see for more detailed information/specifcs, but the sessions get bogged down with too much detail and not enough strategic prioritization	8/25/2015 11:45 AM
102	It was fantastic that they had a youth program including teens. KEEP that!! Plenary sessions were a bit long but I know important things were accomplished. Only challenging part was trying to get to the Peach Tree center (only reasonably priced food) and back during lunch as time was always "short" to get back to the workshops; the workshops were wonderful by the way!	8/25/2015 11:44 AM
103	Make sure there are some free periods when people can socialize	8/25/2015 11:43 AM
104	There needs to be more time for socialization. People haven't seen each other in many years and I often felt rushed when trying to catch up with friends. The days started too early and ended too late. The large formal dinner needs to be less formal so people can mingle.	8/25/2015 11:40 AM
105	Hotel was great but too expensive beyond the room cost. Otherwise very well organized and edifying, due to the person and leader in Metropolitan Tikhon and the daily services.	8/25/2015 11:36 AM
106	Less expensive venue. Missions simply CANNOT AFFORD five days in a downtown metropolitan area with hotel and food costs on top of travel expenses. Maybe for some older affluent parishes that's possible but not for us. When parish can scarcely afford the cost of a priest it's too much expense to stay in an expensive hotel in downtown Atlanta. SECONDLY it is completely ridiculous that the council is run like a week long business meeting. I don't want to hear thirty reports on the status of every institution connected with the OCA. The relevant business could have been conducted in two days. Have the Holy Synod handle the routine business. It's not a shareholders' meeting.	8/25/2015 11:31 AM
107	Keeping sessions on time. Fewer sessions and activities, sometimes one felt overwhelmed.	8/25/2015 11:28 AM
108	Time-limit the committee reports. Encourage use of video in place of static slides for presentations and limit length of video reports. Diocesan reports were well-done.	8/25/2015 11:26 AM
109	Congratulations for a job well done	8/25/2015 11:20 AM
110	Include an evening community	8/25/2015 11:15 AM
111	The space used for the Liturgical services was somehow cramped because of the tables for the plenary sessions. The Hierarchical Liturgy which is to me the highlight of the AAC still had all the tables and so everyone was arranged in the aisles and the back... the lines for communion were hard to spot and it wasn't clear when and how to get up to the cup because of the clumps of people bunched up in the clear spaces. The night before, after Vespers, has in the past been devoted to a time for confessions, but this time the schedule did not include designated priests on duty to hear confession. I had to make a personal appeal to a priest to meet me for confession after the service, and then there were people milling around everywhere, including right up front where the relics were, such that there was no private or quiet space to be had. He heard my confession with people walking back and forth a few feet behind me. It would be an important aspect of the AAC for the large room to be more accommodating to the liturgical services.	8/25/2015 11:13 AM
112	More discussion time...perhaps an extra day?	8/25/2015 11:11 AM

113	Those who are speakers at the Plenary sessions should be lined up near the podium. It is not necessary for everyone (700 people) to be kept waiting while speakers walk to the microphone, take their time getting the Bishop's blessing and then finally say their prepared remarks. Also-- there should be a time limit for oral reports. More time for questions and discussion from the floor. At the very end of the council, opening the floor to general questions and comments means that we are not really sure when the council will end. At that point people want to get on the road. Having an optional open dialogue built into the actual schedule might be helpful. That session also needs to have some kind of time limit.	8/25/2015 11:11 AM
114	The meeting schedule could use some work. Various presentations extended well past the allocated time and it was almost impossible to make up the time needed to get back on schedule.	8/25/2015 11:09 AM
115	This was a governing body. Discussion was severely choked off/controlled. Administrative agenda is shoved through, and the clock is run out on all the rest. Either be conciliar or be autocratic. But a kabuki dance of one when the other is occurring is a waste of precious resource that could be planting missions and feeding the poor.	8/25/2015 11:09 AM
116	A more professional moderator. A less lengthy banquet. Choice of keynote speaker was very good.	8/25/2015 11:08 AM
117	Smaller group meetings. Less videos, which were the "same ole, same ole". If reports are sent out early WHY read them at the Council? Needs to be more "catered in" meals so delegates to not have to eat at restaurants.	8/25/2015 11:06 AM
118	Services could be briefer and at times when they are likely to be better attended. One Divine Liturgy where everyone is present would be preferable to several poorly attended Liturgies. It should be possible to participate in everything offered without getting exhausted!	8/25/2015 11:05 AM
119	I'd really like to see the AAC return to using churches for worship services and plenary sessions. The Parma AAC, while "extraordinary," was a blessing in that regard.	8/25/2015 11:02 AM
120	Was very difficult planning meals. The more affordable places were far away. Was very expensive at the hotel. Would be wonderful if we could find more affordable conference areas.	8/25/2015 11:02 AM
121	Thank you Fr. Eric! Fr. Paul Jannakos	8/25/2015 11:01 AM
122	Time management re: speakers and presentations. Also, be sure to select chairs that can "tactfully" keep things moving :)	8/25/2015 11:01 AM
123	Better time management. Several times sessions ran over causing a change in the daily schedule. (And not just a few minutes, but at least an hour.)	8/25/2015 11:01 AM

REPORT OF THE STEWARDS OF THE ORTHODOX CHURCH IN AMERICA  
Archdeacon Joseph Matusiak

On July 1, 2016 I began my work for the Stewards of the Orthodox Church in America. Prior to this date I met with Mr Raymond Boyd, outgoing SOCA administrator. During that meeting and one subsequent, Ray gave me a good introduction to everything that he has accomplished over the past year and to how the office works. He showed me the Stewards Packet he created, the goals of the office, and where we are at now in terms of the database and contact information. He also shared with me the model "gift acceptance policy" which we will use to help craft our own policy relevant to our needs and capacity. He shared with me the model he has used when visiting parishes, and we had a good discussion on how we might increase the number of parishes visited by making use of Metropolitan Council Members, Department heads, Officers and other "ambassadors" of the OCA.

It should be noted here that Ray did yeomen's work in getting the office organized, putting the database in good shape making hundreds of personal phone calls to assure we have good database information.

For the 2016 fiscal year we have committed to doing two appeals. When I began on July 1, 2016 no appeals had been made, and I am not sure that we will be able to fit two in for 2016. In mid-July I began the planning for the first appeal which we decided would be for the Feast of St Herman. Beginning the planning for an appeal three weeks from the start of the appeal is not optimal, but we felt our first appeal could not wait until the fall.

I spent a lot of time thinking about this appeal, what our message should be, and how we want to accomplish it. While generally we try to use the All American Council theme of "Expanding the Mission" in all we do until the next council, I felt that the OCA and SOCA really need to remind the faithful of the many justifiable reasons we have to be proud of the Orthodox Church in America. On August 9 I posted a video of myself introducing the St Herman appeal. The general theme of the video was stewardship as more than financial giving. My intention was to remind members of the OCA that we are each stewards of the spiritual deposit given to us by St Herman and those monastics with him who landed in Alaska two-hundred and twenty years ago.

The second proposed appeal, which needs further work, would open on the Feast of the Meeting of the Lord in the Temple. The theme of the appeal could be centered on youth and highlight generations of faithful in the Church - telling their stories as they have experienced life in the OCA from their youth to now.

Apart from our appeal member acquisition must be priority. This fall I will begin looking at ways to identify and reach out to potential new members. One idea is to use the old TOC subscription list - last month an older gentleman called me to ask about continuing his now defunct TOC subscription to help pay for the OCA REVIEW. I told him there is no subscription for the Review and I pointed him toward the Stewards, it made sense to him, it might make sense to others. We will also have to work closely with Diocese, Metropolitan Council Members and other "ambassadors" to acquire as many addresses and emails as possible. Going forward we might think about focusing on the idea of 'membership' and minimum donations to attain "membership" status over and above 'donation'.

For the present, it is of utmost importance to have 100% participation from the Holy Synod, Metropolitan Council and Chancery Employees. The ability of an organization to show full participation from within is key to gaining new members. And, if and when we expand our ability to conceive of grant applications our participation percentage will be very important.

Finally, apart from simply raising money for the ministry departments of the OCA, it is my vision that the Stewards of the OCA begin thinking about new ways to support the work of the OCA. Fundraising dinners, concerts, charity runs and other such events are all things we need to move toward if we are truly going to grow SOCA into a strong philanthropic institution within the OCA.

# FAULKNER LAW REVIEW

VOLUME 7

FALL 2015

ISSUE 1

## CONTENTS

### INTRODUCTION

INTRODUCTION FROM THE FAULKNER LAW REVIEW EDITORIAL BOARD ..... i

### ARTICLES FROM THE FAULKNER LAW REVIEW FALL SYMPOSIUM ON THE MEANING OF RELIGIOUS LIBERTY IN THE ANGLO-AMERICAN LEGAL TRADITION.

ORIGIN STORIES MATTER: GETTING RIGHT WITH RELIGIOUS FREEDOM

*Matthew J. Franck* ..... 1

A MADISONIAN VISION OF RELIGIOUS LIBERTY

*Andy G. Olree* ..... 19

JOHN JAY AND RELIGIOUS LIBERTY

*Jonathan Den Hartog* ..... 63

WHAT SHOULD THE SCALES OF JUSTICE BALANCE?: HISTORICAL ASPECTS OF THE RELIGIOUS LIBERTY DEBATE

*Scott A. Merriman* ..... 79

KIM DAVIS AND THE QUEST FOR A JUDICIAL ACCOMMODATION

*Jeffrey B. Hammond* ..... 105



# FAULKNER LAW REVIEW

VOLUME 7

FALL 2015

ISSUE 1

## INTRODUCTION

The Faulkner Law Review presents our newest issue, Volume 7, Issue 1. All of the articles in this issue come from participants of the annual Faulkner Law Review Symposium, which was held at Alley Station in downtown Montgomery, Alabama in October of 2015.

Last year's Editorial Board decided to steer the journal away from its origins as a general publication, and refocus it toward exploring Anglo-American legal traditions. As the Editorial Board, we decided at the outset of our tenure to continue in that direction, and to examine a timely and significant legal and cultural issue through the lens of Anglo-American legal traditions.

This year's symposium topic was the meaning of religious liberty in the Anglo-American legal tradition. From our perspective as the Editorial Board, religious liberty is one of the foundational pillars upon which this country was built, and given the recent string of current events involving religious liberty in this country, we could think of no better topic to explore at the symposium.

The symposium was a resounding success, and featured speakers who discussed the topic from both historical perspectives as well as modern viewpoints involving current events. These speakers explored the origin of religious liberty as even predating its inclusion within the First Amendment, as well as its meaning to different Founding Fathers, and also its current meaning within modern American jurisprudence. Additionally, the symposium concluded with a panel of legal and religious practitioners discussed the current state of religious liberty in this country, and how it affects their respective practice.

As a whole, the symposium generated a great deal of interest from both local and nationally renowned scholars and practitioners, as well as in our local community. We are humbled by the interest generated from the symposium and support shown through attendance and participation.

It is our hope that you find these articles to be as profound and scholarly as we have. We are deeply indebted to our authors,

our administration, our faculty, our community, and most especially our faculty advisor—Adam J. MacLeod. The Editorial Board also thanks our Junior and Senior Editors for their tireless work with hosting the symposium and their outstanding efforts compiling the journal.

Respectfully,

The 2015-2016 Faulkner Law Review Editorial Board\*

---

\* The Editorial Board regrets that there was an error in one of the articles appearing in Volume 4, Issue 2, and issues the following correction:

The article *Law, Religion, and Culture Intertwined: A Case Study in the Development of American Jewish Law*, 4 FAULKNER L. REV. 445 (2013), by Mark Goldfeder, inadvertently failed to credit the work of Dr. Ronald B. Standler, whose research and commentary on the issue of parental payment of a child's college expenses was very valuable in comparing the teachings of Jewish law to the approaches taken by American courts and legislatures. Part III of the article drew on Dr. Standler's essay. The author wishes to acknowledge Dr. Standler's contribution to the scholarship in this area and give proper attribution to Dr. Standler's work. The work composed by Dr. Standler, on which the author relied, is titled *Legal Duty of Parent in USA to Pay for Child's College Education* and is available at [www.rbs2.com/son\\_edu.pdf](http://www.rbs2.com/son_edu.pdf).

7:i  
cial-  
hard  
ork  
pil-

## ORIGIN STORIES MATTER: GETTING RIGHT WITH RELIGIOUS FREEDOM<sup>1</sup>

*Dr. Matthew J. Franck*<sup>2</sup>

Around the world, religious freedom is being threatened. In some places, the threat is immediate and deadly, as when the terrorists of the Islamic State murder Christian martyrs for an international audience and openly avow their intention of wiping out ancient communities of Jews, Christians, Yazidis, and fellow Muslims who do not conform to their extremist views. In other places, the threat seems at first to be trivial by comparison because no physical violence is employed. Yet, quite real pressure is applied: as when Catholic Charities adoption services lose their state licenses because they will place children only with families headed by a married man and woman, or when the federal government threatens the Little Sisters of the Poor with crippling fines because they will not compromise their witness to the Catholic Church's teaching on contraception, or when the owners of a small bakery in Oregon are threatened with the loss of all their property because they will not devote their creative energies to an event that their conscience tells them is a travesty of marriage.

In all of these cases, the freedom to witness to the truth is under assault. Let us not forget that the first requirement of bearing witness to the truth of one's faith is to live that truth and to act on it, in public as well as in private. It is a poor witness who is reduced to saying, "here is what I believe is right and good and true about the human person, but I do not live according to it because others with power over me will not permit it." To say the truth but not to live it is a pitiable condition—and if we are not permitted to live the truth, it will not be long before we will not be

---

<sup>1</sup> Delivered as Keynote Address at the *Faulkner Law Review* Symposium on the Meaning of Religious Liberty in the Anglo-American Legal Tradition (Montgomery, Alabama, Oct. 15, 2015).

<sup>2</sup> Director, William E. and Carol G. Simon Center on Religion and the Constitution, Witherspoon Institute, Princeton, NJ; professor emeritus of political science, Radford University; visiting lecturer in politics, Princeton University. B.A., Virginia Wesleyan College; M.A., Ph.D., Northern Illinois University.

allowed to say it, either. It is imperative, therefore, that we never retreat from “I will” to “I would but cannot.”

Part of the reason religious freedom is in trouble is that its intellectual underpinnings are misunderstood. This is a problem, both philosophical and historical, and it can be traced to the choice our culture has made between two stories of religious freedom’s origins.

#### FIRST ORIGIN STORY: THE MYTH OF THE SECULAR ENLIGHTENMENT

According to the standard account widely taught today, religious freedom was a discovery or invention of the secular Enlightenment—perhaps somehow springing fully grown from the brow of Thomas Jefferson, though its origins might be traced to earlier thinkers such as the seventeenth-century Englishman John Locke. The narrative thread here is that following the violence in the name of religion that underlay the Thirty Years’ War and the English Civil War, a hardy band of revolutionary thinkers (intent on achieving peace and stability) developed wholly new political principles that would reduce the chances of such conflict in the future. As the historian of Christianity, Robert Louis Wilken has written, in this account John Locke was “the architect” of religious freedom, and his *Letter Concerning Toleration*,<sup>3</sup> published in 1689, was the “charter document” of the new politics.<sup>3</sup>

In this origin story, the political and legal principles of religious freedom were the work of thinkers like Locke—who were secular, Deist, or irreligious—preaching rigorously secular politics of radical individualism in which religion is essentially privatized—relegated to the church on days of worship, and to the home on every other day. The most salient *political* feature of religion, in this view, is that it causes conflict and division wherever there is a plurality of religious beliefs. This means that either the state must adopt one religious dispensation as the officially established church and brook no competition with it (the option recommended by Thomas Hobbes in the mid-seventeenth century), or see to it that religion is strictly separated from political life so that its many

---

<sup>3</sup> ROBERT LOUIS WILKEN, THE CHRISTIAN ROOTS OF RELIGIOUS FREEDOM 11 (2014).

voices are neutralized—the view attributed (rightly or wrongly) to Locke.

So in the United States, this origin story sees the “no establishment” provision of the First Amendment as our most important constitutional principle. As a secularist historian of this constitutional provision, Leonard Levy, said three decades ago, “the establishment clause functions to depoliticize religion; it thereby helps to defuse a potentially explosive situation. The clause substantially removes religious issues from the ballot box and from politics.”<sup>4</sup> The upshot of this reading of our constitutional principles is that all expressions of religion in the public square are treated with suspicion as the harbingers of an incipient theocracy, a theocracy that would move from the potential to the actual if the particular religious view on offer were to become influential in the making of public policy.

Other interesting conclusions follow from this secularist or “separationist” view of the relation between religion and politics. One such conclusion is that we could do with much less of this dangerous thing, and that it would therefore be altogether good if the freedom to profess any faith, coupled with a strict rule that religious considerations never intrude on our political life, resulted in the gradual attenuation of religion altogether. Thus, the “secularization” of society is an expected and welcome result of modernization and the spread of freedom. Religion is “potentially explosive.” However, freedom of religion makes religion less volatile, and it does this chiefly by leading people gently out of their benighted condition as religious believers, and into more rational ways of thinking—by introducing them to one another across the lines of difference until each one realizes that he has no true ground to prefer his own inherited belief to another, and comes to believe it less and less. Thus, does a free society, in this account, proceed from toleration of religious difference to the positive achievement of religious indifference?

As one can already detect, there is a strong prejudice in this secularist origin story (where there is not in fact an outright declaration) that religion is irrational. This prejudice may make an appearance in softer form, holding that religion has to do with mat-

---

<sup>4</sup> LEONARD W. LEVY, *THE ESTABLISHMENT CLAUSE: RELIGION AND THE FIRST AMENDMENT* iv (1986).

ters *beyond* the reach of reason—but *so far* beyond its reach that religion resonates on an altogether different and incompatible wavelength from the one where reason functions. Religion is “spiritual” or concerned with “higher values” or “eternity,” but here on *terra firma* we had better take our bearings, in our social and political life together, from principles that our shared practical reason can adjudicate. Consider this the “religion is too lofty and therefore irrelevant to earthly affairs” prejudice.

But this softer, seemingly friendlier view of religion easily converts into its much more hostile sibling, the view that religion is not so much beyond reason as *beneath* it, belonging to an earlier age of mankind’s infancy—an age of superstition and mumbo-jumbo. This is the “religion is backward and gets in the way” prejudice, and it has shown up in the most respectable circles ever since Karl Marx declared religion the “opium of the people,”<sup>5</sup> something hindering society’s progress, but on its way to extinction in any event. So, the atheist scholar Daniel Dennett believes that in our information-saturated age, religion is—happily, in his view—on the way out because the leaders of faith communities cannot keep their flock from informing themselves in ways that will shake their devotion to old beliefs that depended on their ignorance of alternative ideas.<sup>6</sup>

Dennett stands as a perfect representative of the mythical origin story that I’m describing. The Enlightenment was all about introducing into the world for the first time (at least on a large scale) the idea that reason and faith are at odds; that the freedom to believe whatever one wishes to believe will be immediately good for peace and the avoidance of conflict, but over the longer term better still for its effect in relegating religion to the past—shedding religion like a serpent sheds its old skin, with mankind entering a new Garden of Reason in which conflict on the basis of religion is unthinkable any longer, because religious faith itself has become impossible to cling to.

Even while paying lip service to the freedom of religion and the rights of conscience, many of our leading political and social figures today operate on something like the assumptions I have

---

<sup>5</sup> KARL MARX, CONTRIBUTION TO THE CRITIQUE OF HEGEL’S PHILOSOPHY OF RIGHT (1844), reprinted in THE MARX-ENGELS READER 54 (Robert C. Tucker 2nd ed., 1972).

<sup>6</sup> Daniel C. Dennett, *Why the Future of Religion Is Bleak*, WALL STREET JOURNAL (Apr. 26, 2015), <http://www.wsj.com/articles/why-the-future-of-religion-is-bleak-1430104785>.

been describing, in which the soil from which religious freedom sprang was a deep skepticism or enmity toward religious faith, and in which the chief benefit of religious freedom in the long haul will be the final disappearance of any religion about whose freedom we need concern ourselves. In the meantime, on this side of that happy culmination, the presuppositions I am describing can explain a great deal about our current religious freedom controversies. More on that after I describe the other origin story about religious freedom—the one that happens to be true.

One last point, however, to spin out the implications of this first origin story. In the secularist account, religious communities and relationships, and religious works and purposes are treated as one species of the genus “civil society”: lumped in with other forms of private associations and enterprises in which people might band together. All such private associations—from the business corporation to the medical society to the soup kitchen, from the university to the charitable aid society to the sporting club—are forms of human organization in which individuals jointly pursue some very particular kind of good. Additionally, all of these associations are strictly voluntary, with individuals entering and exiting them according to their interests and inclinations at any moment.

In the standard-issue secular account of western liberalism, the Church is also merely one of the subsets of the larger set of such joint pursuits; and it is not a particularly special one. Religion in fact, is seen—where it is *not* viewed with outright hostility—as pursuing a good that is narrow and particular, a quality it has in common with the bowling league or the blood bank. Only the state seeks the good simply or in general, and only the state has the proper status of being the arbiter of all other human associations’ claims to be acting in the name of some particular good. When we come to tally the goods each one pursues, religion is the particular, and politics is the general. Believing this account of their relationship will naturally color our understanding of which one holds the proper authority in our lives, and which is in a position to instruct the other.

RIGHT

(Apr.  
1785.

## SECOND ORIGIN STORY: THE RELIGIOUS BASIS OF RELIGIOUS FREEDOM

The true story of religious freedom is rather different from the standard account regarding the secular Enlightenment. The true origin story is that the principles of religious freedom grew, not without pain and struggle, out of the Jewish and Christian reflection on the human person as a being endowed with a dignity that is stamped on his nature as *imago Dei*, made in the image of God.

In this second, better origin story, the struggle for religious freedom long predates the Enlightenment or the conflicts that arose during the Protestant Reformation. The struggle can be seen far earlier in the effort of the medieval Church to gain its independence from the kings of Europe. It can also be seen in the Christian apologist Lactantius's challenge to political authority.<sup>7</sup> Lactantius, a contemporary of the emperor Constantine, said religion "cannot be coerced," but must be the commitment of a free will. Earlier still this principle can be seen in the thought of Tertullian, who wrote that "it is by free choice not coercion that we should be led to religion."<sup>8</sup>

Our scriptures themselves speak in the accents of the freedom to bear witness. As reported in the fourth chapter of the Acts of the Apostles, the rulers and priests and scribes in Jerusalem summoned Peter and John and "charged them not to speak or teach in the name of Jesus. But Peter and John answered them, 'Whether it is right in the sight of God to listen to you rather than to God, you must judge; for we cannot but speak of what we have seen and heard.'"<sup>9</sup> In the fifth chapter of Acts, following some events too wonderful not to have impressed sensible men, the surprisingly unimpressionable high priest complained that Peter and the apostles ignored these official commands to cease and desist, and Peter and his fellows answered, simply, "We must obey God rather than men," and proclaimed that "we are witnesses" to God's saving power.<sup>10</sup>

---

<sup>7</sup> See WILKEN, CHRISTIAN ROOTS OF RELIGIOUS FREEDOM, *supra* note 3, at 15.

<sup>8</sup> *Id.*

<sup>9</sup> Acts 4: 19-20 (Revised Standard Version).

<sup>10</sup> Acts 5: 29, 32 (Revised Standard Version).



OUS

from  
The  
grew,  
an re-  
ignity  
age of  
religious  
arose  
en far  
pend-  
ristian  
antius,  
cannot  
Earlier  
who  
be led  
free-  
Acts  
salem  
teach  
hether  
God,  
n and  
ts too  
singly  
apos-  
Peter  
than  
saving

In our own national history, this civilization-long origin story, once retold in full, restores the *religious* heroes of religious freedom to their place of pride —Roger Williams, the Baptists and Methodists and other evangelicals of the two Great Awakenings of the eighteenth and nineteenth centuries, the Quakers and other Christian abolitionists, Bishop John Carroll and Bishop and Saint John Neumann, the Mormons and Jehovah’s Witnesses who faced persecution in more recent times, the Catholic and Anabaptist and Jewish and Orthodox believers who came to our country and founded thriving communities that became part of the American tapestry, the leaders of the African-American church who overcame Jim Crow with the power of moral suasion, and the evangelicals and Catholics and others who have fought tirelessly for the rights of the unborn. Today, we may also add the Little Sisters of the Poor, Wheaton College, and Hobby Lobby, all of whom stand fast against impositions on their consciences by official authority. These individual believers and their communities, not the secular separationists, are the real heroes of religious freedom in our history.

Recapturing and retelling our history in this truer way, we can glimpse a centuries-long development of free societies, a distinctively western and, thus, an inescapably a Christian contribution to human flourishing. One culmination of this development is American constitutionalism, which owes much of its success and longevity to the religious impulses of the American people. Let me underscore that: the good and just aspects of the American political order came about *not despite, but because* of its people’s religious faith. American politics are founded, as the Declaration of Independence tells us, on a belief in the God-given equality of each and every human person, and the “unalienable rights” that flow from the fact that we are all “created equal.”<sup>11</sup>

In this respect, our politics rest at bottom on a faith in the ineradicable dignity of every human person. However, this is not a teaching of radical individualism of every man for himself and the devil take the hindmost. This faith is bound up with an understanding of our mutual dependence on one another in political communities where ultimate earthly sovereignty rests on all our

---

<sup>11</sup> THE DECLARATION OF INDEPENDENCE para. 2 (U.S. 1776).

shoulders, together, as the parties finally responsible for the justice or injustice of our government.

With this burden resting on us all, it is no wonder that a religious people—as most Americans always have been—should give thanks to the God who made us, who gave us the burden of self-government, and who alone can lighten the burden for us and make us capable of bearing it. And so, from our earliest history, we see that the faith of Americans is welcome in the public square, that acknowledgment of our dependence on the Almighty, and of our trust in divine Providence, is part of the *public* life of the nation.

In this account of religious freedom's origins and principles, we see things very differently than in the secularist account. As the late Father Richard John Neuhaus once put it, "It is not chiefly a secular but a religious restraint that prevents biblical believers from coercing others in matters of conscience . . . . [W]e believe that it is the will of God that we should not kill one another over our disagreements about the will of God."<sup>12</sup> Father Neuhaus was not trying to whitewash the record of religious strife and oppression in the history of Christianity, and neither am I. No human struggle to bear witness to the truth is without its dark chapters of failure and sin. But, Professor Wilken, whom I quoted earlier, is surely right to say that by the time we get to John Locke's seventeenth century teachings on toleration, we would have to have blinders on not to see that "his work is saturated with Christian assumptions," and that "[h]is thinking cannot be understood without reference to Christianity."<sup>13</sup> The story of religious freedom is, in some sense, a tale of Christianity purifying itself.

As with the mythical first one, there are certain conclusions that spin out of this true second story. While some countries, such as England, have found that religious freedom can coexist with some form of established religion, here we reject that, making churches the paradigm case of voluntary association, with none preferred over others. But contrary to the first origin story, the faith of all, and the motivations of faith, are welcome in the public

---

<sup>12</sup> RICHARD JOHN NEUHAUS, A NEW ORDER OF RELIGIOUS FREEDOM, 20 FIRST THINGS 14-15 (Feb. 1992).

<sup>13</sup> WILKEN, CHRISTIAN ROOTS OF RELIGIOUS FREEDOM, *supra* note 3, at 38, 39.

square, and are *in themselves* no more cause of division and discord than any other strongly held non-religious views.

Religious communities and their works, however, are not just the paradigm case of voluntary association. They are a special and distinctive case, rightly set apart for unique constitutional protection. Religion, in any political order that protects religious freedom in full, is immune in many respects from the jurisdiction of state power. Yet religion also deserves the fostering and encouragement of our political order. The space for religious communities and their works having been appropriately cleared, religious communities bring other voluntary associations in their wake, and generate the great diversity and fullness of a healthy civil society.

Last, and by no means least, religious freedom shields the one kind of institution in civil society that has the standing to rebuke the state's claim to being the ultimate sovereign and the arbiter of all claims to be acting in service of the good. Only religion can remind us all of a good that encompasses and then transcends political life. Only religion can remind us that the temporal ultimately answers to the eternal.

#### WHY RELIGION NEEDS AND DESERVES ITS SPECIAL STATUS

The proponents of the first origin story I told, the myth of the secular Enlightenment, regard the claims of religion as anything but distinctive. Churches and other religious associations, communities, and institutions are to be classified with any other social groups or undertakings that arise from people's strongly felt commitments—no different, as I said, from the blood bank or the bowling league. As the legal philosopher John Finnis noted, this is a completely “external view” of religion.<sup>14</sup> This external view is completely unable to account for the special status for freedom of religion, over and above other forms of freedom of association or speech in our Constitution or in the United Nations Declaration of Human Rights.<sup>15</sup>

It is, however, good to be prompted to think this through from first principles. Why *should* religion and the freedom of religion have a distinctive and special status in political life?

<sup>14</sup> John Finnis, *Does Free Exercise of Religion Deserve Constitutional Mention?*, 54 AM. J. OF JURIS. 41, 44 (2009).

<sup>15</sup> *Id.*

The answer begins with a fact that will sound as though it contradicts my earlier characterization of religious communities as *voluntary* associations. In the sense that religious communities should be understood as freely entered and exited, that was a true description. Yet at bottom, religion as an individual experience is in some sense *non-voluntary*. As the Fathers of the Second Vatican Council said in *Dignitatis Humanae*, the 1965 Declaration on Religious Freedom, "The truth cannot impose itself except by virtue of its own truth, as it makes its entrance into the mind at once quietly and with power."<sup>16</sup> This was not some new twentieth-century Catholic insight. One hundred and eighty years earlier, James Madison, in his famous "Memorial and Remonstrance Against Religious Assessments," said that "the opinions of men, depending only on the evidence contemplated by their own minds[,] cannot follow the dictates of other men."<sup>17</sup> In each of these great documents of religious freedom there is a recognition that our belief *cannot* be compelled because it *is* compelled already by our own best grasp of the truth. In this respect religion is not so much chosen as it is accepted, as a truth one has discovered or has learned.

And, while religious faith is not wholly explicable on rational grounds, it is bound up with the operation of our reason, as an effort to respond to whatever evidence we can grasp of the nature and meaning of our existence, and of its divine ground, if any. Religion begins in intellectual and spiritual inquiry that is answered by reason and faith working together. One has a duty to truth, and a duty to follow where it leads, in recognition of an authority that is higher than any that men and women can make.

But, in bringing our intellect, our conscience, and our will to bear on the truth as best we can understand it, we necessarily attempt to align our lives and actions with this unseen order of reality we call divine. For how can one glimpse the most important

---

<sup>16</sup> His Holiness Pope Paul VI, *Declaration on Religious Freedom (Dignitatis Humanae): On the Right of the Person and of Communities to Social and Civil Freedom in Matters Religious*, (Dec. 7, 1965), available at

[http://www.vatican.va/archive/hist\\_councils/ii\\_vatican\\_council/documents/vat-ii\\_decl\\_19651207\\_dignitatis-humanae\\_en.html](http://www.vatican.va/archive/hist_councils/ii_vatican_council/documents/vat-ii_decl_19651207_dignitatis-humanae_en.html).

<sup>17</sup> JAMES MADISON, MEMORIAL AND REMONSTRANCE AGAINST RELIGIOUS ASSESSMENTS (JUNE 1785), reprinted in JAMES MADISON, WRITINGS 30 (Jack N. Rakove ed., 1999) [hereinafter Madison, *Memorial and Remonstrance*].

truth about one's life—one's relationship to the deepest reality there is—without attempting to live according to that truth?

Naturally, then, the religious believer seeks out the company of others who believe as he does—those who already believe, and those who can be brought to belief—and forms a community of faith with them. For these believers coming together, the truth is constitutive of their community, and represents their shared response to the duty each one has to respond to that truth and the authority responsible for it. Such communities have a dignity of their own in the wider society, and should be protected in their ability to order their own affairs, to act on their religious teachings, and to engage fully with their fellow citizens in the public square, not with their light hidden under a bushel, but in the open, saying and living the truth as they understand it, and without any threat or penalty for their doing so.

Compared to religion, it is politics that rests *entirely* on a voluntary basis. As the Declaration of Independence tells us, government “deriv[es] its just powers from the consent of the governed.”<sup>18</sup> In order to preserve our freedom, we agree willingly to a limited authority that we ourselves make. In some respects we are agreeing to limitations on our freedom—a willing submission of our will, within limits. But, religious freedom is the first of those limits on government, because our religious duties, which are for each of us non-voluntary in some decisive respect, cannot be surrendered or submitted to any merely human authority.

To turn again to James Madison's great Memorial and Remonstrance, our duties to the Creator are “precedent, both in order of time and in degree of obligation, to the claims of Civil Society.”<sup>19</sup> That phrase, “civil society,” is carefully used by Madison because civil society is prior even to government—it is the aggregate of all the individuals who together give that “consent of the governed” that makes government in the first place. So if, as Madison says, “civil society” has no claims that can override our religious duties, it surely follows that government, which is society's limited creature, has no such claims.

<sup>18</sup> THE DECLARATION OF INDEPENDENCE para. 2 (U.S. 1776).

<sup>19</sup> Madison, *Memorial and Remonstrance*, *supra* note 17, at 30.

## THE CONSEQUENCES OF FORGETFULNESS

Our present circumstances in the law and politics of religious liberty can be traced to a common forgetting of the true origins and principles of religious freedom, and a radicalization of the secularist myth. First, we forget or mistake the nature of the human person. The truth about religious freedom begins with men and women as *imago Dei*, the image of God. But what if man is just another piece of matter in motion, a bundle of passions and impulses? What if men and women are wills with no duties to any truth beyond themselves, making claims on their fellows for the protection and sheltering of their willful choices? Then religious claims will deserve no special or unique place, protected in law and sheltered from politics. All claims about human choices will be on an equal plane, to be honored or neglected according to how important, or indifferent, or harmless they seem to others, or more precisely to those others in a position of power to decide.

We can forget, too, that human beings are the makers of government, and turn to thinking of our relationship with the government as one in which we occupy the position of supplicant, of subject and not citizen. This can readily happen if we neglect the "unalienable rights" with which the founders said we were "endowed by [our] Creator." Then we may also give a privileged place to claims of equality or rights that are purely conventional, that are not rooted in our natural rights or liberties. And once we do that, we may find ourselves treating *all* rights as negotiable privileges, to be weighed and "balanced" against each other, as though "rights" can be in conflict, a common error that we can expose simply by remembering that the opposite of a right is a wrong. And, whatever is properly in conflict with a right, properly understood, can only be a wrong, and not another right.

When religious freedom is so reduced as to be one kind of right competing against other "rights" of presumptively equal standing, then naturally we empower government to adjudicate their alleged conflict with each other. Thus, we commit a truly fatal mistake, of giving the government a creeping and finally total jurisdiction over questions of conscience. This may start with a jurisdiction over conduct that responds to the demands of conscience—a jurisdiction we would all accept in cases of conduct that actually works harm to others or to the common good—but if we have stumbled into all the mistakes I have just sketched, it can

become in the end a jurisdiction that reaches belief itself. For remember, wherever the secularist myth fully takes hold, the relationship of religion to politics is invariably viewed as one in which religion is a threat to politics, rather than politics being a threat to religion—just the opposite of the view held by the framers of our Constitution and First Amendment.

### A CONFLICT OF VISIONS

Some contemporary examples will show that these conceptual errors about religious freedom's origins and principles have real practical fallout:

In 2010, the Christian Legal Society, which organizes student chapters at law schools, lost a 5–4 case in the Supreme Court in which it was told, by a state university law school in California, that it could not order its own affairs by insisting that the student officers of the chapter conform to Christian ethical standards. The university insisted on an “accept all comers” policy that might make sense for the chess club, but that was actively hostile to the purpose of the CLS, which is to forge an intentional Christian community among students.<sup>20</sup>

In 2012, the Obama administration lost a Supreme Court case, with a ruling against its position that the principles of the First Amendment carve out no “ministerial exception” from federal employment laws that prohibit discrimination. The Court rejected this position unanimously, but the astounding thing was that the government made the argument at all, insisting that religious institutions should be treated no differently than other forms of private association. For the administration, freedom of religion was just another instance of a generic freedom of association—as though there were no special mention of religious freedom in the First Amendment—and it was a disposable freedom, in the administration's view, when up against demands of “equality” in employment law.<sup>21</sup>

In 2011, the administration first announced the HHS mandate, which compels employers of fifty or more persons to cover, in their employees' health insurance, the provision of no-cost con-

<sup>20</sup> *Christian Legal Soc'y v. Martinez*, 561 U.S. 661, 663 (2010).

<sup>21</sup> *Hosanna-Tabor Evangelical Lutheran Church and Sch. v. EEOC*, 132 S. Ct. 694, 697 (2012).

traceptives, abortifacients, and sterilization services. The mandate included only the narrowest exemption for houses of worship, causing uproar among religious freedom advocates across the country. The administration has only slightly modified the regulations enforcing the HHS mandate in response to criticism, and contended, until the government's 5-4 loss in the Supreme Court's 2014 *Hobby Lobby* decision, that no owners of a for-profit corporation could claim any protection of the federal law protecting religious freedom.<sup>22</sup>

Despite its loss in *Hobby Lobby*, the administration continues to press its case for the mandate in ongoing litigation (now pending before the U.S. Supreme Court) involving religious institutions and communities like the University of Notre Dame, Wheaton College, Priests for Life, and the Little Sisters of the Poor. The essential argument deployed in these cases by the federal government is that these institutions and ministries are not sufficiently "religious" to be relieved of the requirement that they violate their consciences under the law.

In both Massachusetts and Illinois, new state licensing requirements insist that private-sector adoption agencies must be willing to place children with same-sex couples. Since Catholic Charities will only place children with a married mother and father, their adoption agencies in both states have closed, rather than violate the teachings of their faith regarding the family and the welfare of children. When such large-scale adoption agencies vacate the field, no one is the winner for it and a great many children and families are the losers.

In several high-profile cases, bakers, florists, photographers, and other business owners who have long specialized in service to the wedding business have been targeted for legal penalties if they decline to provide their services to a same-sex wedding or civil union ceremony. In no case have any of these business owners been found guilty of refusing service on the grounds of sexual orientation. What they have claimed is a freedom to obey their conscientious belief, informed by their religious faith, regarding the true meaning of marriage. In some states, such business owners have claimed the protection of state laws designed to shield religious freedom and provide room for exemption from otherwise

---

<sup>22</sup> *Burwell v. Hobby Lobby Stores, Inc.*, 134 S. Ct. 2751, 2767 (2014).



mandatory legal requirements. So far no businesses have won such claims in court.

Despite this track record of state laws largely failing to protect such claims on behalf of religious liberty, the passage of a new law protecting religious freedom in the Indiana legislature (signed by Governor Mike Pence in April 2015) occasioned such an explosion of controversy in mainstream journalism, social media, and the business community that the legislature and the governor rushed to revise the just-passed legislation with a new law so watered down that it raises questions whether it protects religious freedom in any meaningful way.

Also in April 2015, in the oral arguments of the *Obergefell* case on same-sex marriage, Justice Samuel Alito asked Solicitor General Donald Verrilli (who represented the government, taking the side of the plaintiffs in favor of same-sex marriage) whether, in a future legal landscape with same-sex marriage guaranteed as a federal constitutional right, there would be any danger to the tax-exempt status of religious universities and other ministries that are unwilling, for conscientious religious reasons, to recognize same-sex couples as married. Mr. Verrilli said "it's certainly going to be an issue . . . . I don't deny that."<sup>23</sup> In a July 2015 Senate hearing, Senator Mike Lee of Utah asked IRS Commissioner John Koskinen whether the Obama administration has any plans, in the wake of *Obergefell*, to revoke any nonprofits' tax-exempt status on such grounds.<sup>24</sup> Mr. Koskinen could only assure him that there is no current intention to pursue such revocation for the remainder of President Obama's administration but did not forswear it as a matter of any principle of religious liberty.<sup>25</sup>

The Supreme Court's June 26, 2015, ruling in *Obergefell*, in which five justices decreed that states must license same-sex marriages, was remarkable (in a case *not* concerned directly with freedom of religion) for the attention paid by the dissenting justices to potential threats to religious liberty arising from the ruling. Es-

---

<sup>23</sup> Transcript of Oral Argument at 38, *Obergefell v. Hodges*, 135 S. Ct. 2584 (2015) (No. 14-556), available at

[http://www.supremecourt.gov/oral\\_arguments/argument\\_transcripts/14-556q1\\_15gm.pdf](http://www.supremecourt.gov/oral_arguments/argument_transcripts/14-556q1_15gm.pdf).

<sup>24</sup> See Michael Stokes Paulsen, Senator Mike Lee's Cross-Examination of John Koskinen, NATIONAL REVIEW Bench Memos (August 6, 2015 1:33 PM), <http://www.nationalreview.com/bench-memos/422167/senator-mike-lees-cross-examination-john-koskinen-michael-stokes-paulsen>.

<sup>25</sup> *Id.*

pecially worth reading are the dissents of Chief Justice Roberts and Justice Thomas, who worried explicitly and at length about the “ominous” and “potentially ruinous consequences for religious liberty” that the ruling represents.<sup>26</sup> Justice Alito, also dissenting, said that the Court’s ruling is bound to be “exploited by those who are determined to stamp out every vestige of dissent.” This too may be understood as a reference to specifically *religious* dissenters.<sup>27</sup>

Reflect for a moment on these examples, and you will realize how many of our struggles over religious liberty take place on the battlefield where our “culture wars” are waged, involving such issues as abortion, homosexuality, and the claims of equality and rights that are pressed in constitutional law, in legislation about “discrimination,” and in the social norms that govern our marketplace, our schools and colleges, and other areas of civil society. Our conflicts over religious freedom are becoming more acute today because the aggressors in our culture war have gained enough ground to dictate public policy in ways that impinge on the conscience of their opponents—those who defend the sanctity of all life from conception to natural death, who defend the meaning of marriage as a conjugal union of a man and woman, oriented toward childrearing, or who insist on a traditional Christian—but not only Christian—sexual ethic.

What are the prospects of a peaceful understanding between these contending forces? The “progressive” side won a redefinition of marriage and completed (for now) its revolution in sexual ethics, while continuing its devotion to the unrestrained abortion license. The “traditional” side, however, merely seeks the autonomy of its religious communities, ministries, and institutions, and the religious freedom of its faithful as they work, speak, and act in the public square. Can the progressive side, which is winning major new triumphs in the culture war, be induced to be magnanimous in victory, and respectful of religious freedom in full?

The prospects for such a peace are bleak. For the roots of the conflict can be seen in the two origin stories of religious freedom with which I began. On the traditional side, the principles that undergird and justify religious freedom begin with fundamen-

---

<sup>26</sup> *Obergefell v. Hodges*, 135 S. Ct. 2584, 2625, 2639, 2642 (2015).

<sup>27</sup> *Id.* at 2642.

tal reflections on the human person as made in the image of God and with obligations to our Creator. We are, like the centurion in the Gospel of Matthew, persons under authority.<sup>28</sup> My friend, Robert P. George of Princeton, is fond of quoting John Henry Newman, who said, "Conscience has rights because it has duties."<sup>29</sup> This view is present in the American founding, as well, when the Virginia Declaration of Rights (written just before the Declaration of Independence) referred to religion as "the duty we owe to our Creator, and the manner of discharging it."<sup>30</sup>

In this vision of religious freedom, limits on the scope of earthly authority spring precisely from an obligation we have to another Authority higher than any earthly one. The felt obligation that calls traditional religious communities to perform their works of mercy and to serve their neighbors is the same obligation they feel to a biblical morality governing sexual integrity, marriage and family, and the sanctity of life. It is also the very same felt obligation that calls the members of these communities, in all charity and good citizenship, to insist on their freedom to live by these moral strictures in their relations with their fellow citizens in the marketplace and other social encounters, whatever the law may be changed to say.

On the progressive side, however, the other origin story holds sway—the myth of the secular Enlightenment. There the commonplace view is that religious freedom has no special or privileged place in our law and politics and that it may be subordinated to other claims of equality, freedom, or autonomy, and that (as three justices of the Supreme Court said in a 1992 abortion case) "[a]t the heart of liberty is the right to define one's own concept of existence, of meaning, of the universe, and of the mystery of human life."<sup>31</sup> In this account, religious freedom was an invention of modern thinkers who were intent on weakening religious faith or, at the very least, weakening its social power and political relevance by ushering religious faith out of the public square where it generates conflict and confining it to the hearth at home and the altar in

<sup>28</sup> *Matthew* 8:9.

<sup>29</sup> ROBERT P. GEORGE, *CONSCIENCE AND ITS ENEMIES* 111 (2013) (quoting John Henry Newman "Letter to the Duke of Norfolk" (1875)).

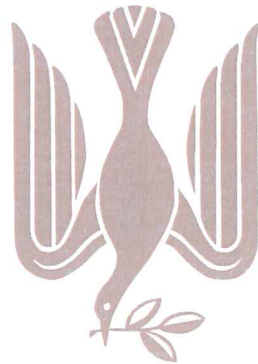
<sup>30</sup> Virginia Declaration of Rights §16 (Va. 1776) available at [http://www.archives.gov/exhibits/charters/virginia\\_declaration\\_of\\_rights.html](http://www.archives.gov/exhibits/charters/virginia_declaration_of_rights.html).

<sup>31</sup> *Planned Parenthood of Se. Pa. v. Casey*, 505 U.S. 833, 851 (1992).

the church. In our own time, the adherents to this view appear to believe that religious freedom has reached its sell-by date.

Our duty is to tell the true story of religious freedom, to witness to the truth about the human person, and to defend the complete liberty of individuals, families, communities of faith, and their ministries to speak, to act, and to live the teachings of their faith in every corner of the public square as well as the private spaces they have a right to claim for themselves. It will take arguments, in season and out of season. It will take courage, often in the face of ridicule, accusations of "bigotry" or "hate," and even threats of legal punishment. It will take patience and charity as we offer the truth in loving witness to our fellow citizens. And, it will take much prayer, asking God for the strength to carry on in a duty that we owe above all to Him who made us and who loves us.

*Thy Will Be Done*



STRATEGIC  
LEADERSHIP,  
PLANNING, AND  
MANAGEMENT  
*for*  
CHRISTIANS

Peter M. Danilchick

Material provided by SVS Press for use at the fall 2016 Metropolitan Council retreat (OCA).  
Not for redistribution or sale. Copyright Peter M. Danilchick.

# Thy Will Be Done

*Strategic Leadership, Planning,  
and Management for Christians*

PETER M. DANILCHICK

ST VLADIMIR'S SEMINARY PRESS  
YONKERS, NEW YORK  
2016

Material provided by SVS Press for use at the fall 2016 Metropolitan Council retreat (OCA).  
Not for redistribution or sale. Copyright Peter M. Danilchick.

# Table of Contents

PREFACE	7
INTRODUCTION	13

## PART ONE

### *Leadership: To What End?* 21

- 1 Seeking the Will of God 25
- 2 The Five Requirements 31

## PART TWO

### *Strategic Leadership* 57

- 3 Who Are the Leaders? Lessons from the Prophets 61
- 4 Foundations of Christian Leadership: Six Goals 69

## PART THREE

### *Ministerial Leadership* 91

- 5 King, Priest, and Prophet: Leadership in Action 93
- 6 Family, Community, and Vocation:  
Leadership of the Laity 105
- 7 Service: Leadership of the Deacon 117
- 8 Sacrifice: Leadership of the Priest/Presbyter 123
- 9 Shepherd and Overseer: Leadership of the Bishop 133



PART FOUR

*Strategic Planning* 149

- 10 “Strategic Planning is for Business, not the Church!” 157
- 11 The Four Questions 165
- 12 The Planning Process 171
- 13 How to Develop a Strategic Plan 185

PART FIVE

*Strategic Management* 199

- 14 I’m on a Board (or Council): What Do I Do Now? 201
- 15 Staying Out of Trouble:  
Ethics and Regulatory Compliance 215
- 16 Meetings, Meetings, Meetings:  
How to Facilitate Collaboration 225
- 17 How to Reach Agreement with Disagreeable People  
(and Others) 239
- 18 How to Manage HR Issues such as Performance,  
Misconduct, etc. 249
- 19 How to Avoid Program Disappointments  
and Project Overruns 261
- 20 How to Understand Basic Organizational Finances 271
- 21 How to Prepare (or Request) a Stewardship Report 281
- 22 How to Raise Funds 289

EPILOGUE 303

BIBLIOGRAPHY 305

INDEX 311

Material provided by SVS Press for use at the fall 2016 Metropolitan Council retreat (OCA).  
Not for redistribution or sale. Copyright Peter M. Danilchick.





## Preface

I began writing this book in order to talk about strategic planning and management from a Christian viewpoint. Now retired, I worked thirty-three years as an executive in one of the world's largest corporations and also served as a deacon in the Orthodox Church for most of that time. More recently, I became convinced that planning and management principles, however valuable in themselves, are not fully effective unless the basic and critical aspects of leadership, especially Christian leadership, which underpin those principles, are grasped, understood, and practiced.

In the Church, newly ordained clergy, including bishops, are often thrust into the job with little practical experience in dealing with others in a managerial or leadership sense, let alone in assuming responsibility for their spiritual development and care. Lay members of a parish council or another ministry group may have difficulty relating with one another, seeing new ways of performing their responsibilities, or working with others in determining and implementing desired change. In the wider Church, i.e., "the world," similar difficulties may arise when it comes time for one to undertake a leadership role at the office, factory, or home. And when one is a Christian, there can be confusion as to how to fulfill these leadership responsibilities *as* a Christian.

My hope is that this book will help leaders of churches and other organizations to address leadership issues appropriately in an effective, harmonious, and ultimately Christian way. It will also help individuals working outside the Church in secular occupations to exercise Christian leadership in what may be an agnostic or even anti-Christian environment. As in all spheres of human activity, any welcome change or positive development begins and ends with individual persons. Ultimately, Christian personhood and community is what this book is about.

There are scores of volumes on “leadership” that present varied and sometimes contradictory approaches for how to acquire and exercise leadership skills. Christians may wonder if there is any real Christian leadership model, or whether we just need to be content with secular offerings. This book presents such a Christian leadership model. It declares that the fundamental goal of Christian leadership is the simple statement in the Lord’s Prayer: “Thy will be done.” The questions that Christians need to ask are: What is the Lord’s will for me, our family, our parish, and our organization, here and now? How do we discover and agree upon the Lord’s will? In implementing his will, how should we best interact with each other as fellow leaders and parishioners, neighbors, and colleagues? Are we united in one purpose and, if not, how can we be? To answer these questions is the task of Christian leadership.

We might ask if such a Christian leadership model can be used in a secular setting, such as an office or factory floor. My answer to that is the same as the warning of our Lord: “No one can serve two masters; for either he will hate the one or love the other.”<sup>1</sup> We do not have to invoke our Lord’s name externally to others, but surely we should behave and act externally as though he is directing us inwardly, wherever we may be.

### THIS BOOK

The title of this book refers not only to leadership, but also to *strategic* leadership, planning and management. Why the emphasis on “strategic”? And why include “planning and management”?

The word *strategic* comes from the Greek *stratēgia*, which means “leading an army; the office of a general.” It implies taking the resources that one has, improving them, and employing them to achieve a set objective. Strategic leadership means always taking into account the people with whom one works and the goal they wish to achieve together. It does not look at the leader alone, nor focus just on the leader’s desired characteristics, but goes beyond that to the way the leader relates to others in order to attain the goal.

<sup>1</sup>Mt 6.24s

Often, the concepts of leadership, planning, and management are opposed to one another. For example, it is frequently assumed that leaders are the initiators, planners are the thinkers, and managers are the doers. In fact, however, effective leaders are required to be both good planners and good managers if they want to ensure that their ideas are properly thought through and can be implemented as planned. Planners need to ensure that plans are grounded in a broad leadership vision, yet specific enough to avoid stumbling blocks when put into action. Managers must be involved in both vision and planning, and can effectively lead the individuals whom they are managing. All these functions need to be integrated strategically to ensure that appropriate goals are set, resources are properly marshaled, and the goals are achieved.

This book intends to enable the reader to:

- Understand the fundamental goal of Christian strategic leadership as consciously doing the will of God, not only personally but also in community, rather than fulfilling one's own desires for influence and power.
- Obtain Christian insight into what a leader is and how leadership is exercised in specific Church ministries, as well as worldly responsibilities. The text provides specific Christian leadership guidance and principles synthesized from Scripture, the writings of the Church fathers, and Church tradition, as well as practical experience gained by the author over more than four decades.
- Learn and be ready to apply practical principles of strategic planning and management to properly carry out the responsibilities of Christian leadership. The book outlines a specific process for strategic planning that can be used in personal, Church, community, and corporate situations. It provides focused recommendations to address issues with working with other people and to effectively carry out management responsibilities. It draws heavily upon the author's personal experience in Church and corporate life.

Part One discusses the essential foundation for everything that follows: seeking the will of God and doing his will in practice. Part Two discusses the foundations and goals of Christian leadership, drawing heavily on the Scriptures and the writings of Church fathers. Part Three delves into the particular aspects of ministerial leadership, adding to the above sources the baptism and ordination services of the Church. Part Four outlines the basics of strategic planning, giving enough detail and guideposts to enable a Church organization or nonprofit to conduct strategic planning. Part Five discusses selected management topics of interest to both Church and general organizations.

#### ABOUT THE AUTHOR

I have been a deacon in the Orthodox Church for forty years, serving in six countries, several different Church jurisdictions, and across varied cultures. I have organized new missions and worked with established parishes. I have served on various governing boards and councils of parishes, dioceses, metropolitanates, and other church organizations, including a seminary. I have consulted on administrative and strategic planning issues for various Church organizations, including parishes, a seminary, a monastery, and a summer camp for children.

While I was educated as an engineer, my professional work has been in international business development, negotiations, and management. Most of my responsibilities involved supervision, management, planning, and leadership as an executive in one of the world's largest global corporations. At the same time, I was associated with various other organizations around the world, involving other industry advisory roles and educational governance responsibilities.

My corporate career development and continuing education followed a familiar pattern. First, I worked as a sole contributor, then supervised a few others. My role expanded to management of ongoing projects and organizations and, lastly, to leadership of new, creative, and breakthrough ventures. In business, this progression is known as career development and managed by committees within the corporate organization.

However, when it comes to Church organizations, this kind of organic yet intentional activity happens rarely, if at all. In fact, training in leadership, planning, and management skills is sorely lacking.

My hope is that this book will contribute to improved leadership development among Christians called to lead the Lord's flock, whether it be large or small, many or few, in Church as well as secular environments. May his will be done.

Material provided by SVS Press for use at the fall 2016 Metropolitan Council retreat (OCA).  
Not for redistribution or sale. Copyright Peter M. Danilchick.

## Introduction

Vince Lombardi once said that leaders are made, not born. As an ultra-successful former head coach who led the Green Bay Packers to five NFL championships, Lombardi ought to know. So if we agree that leaders are made, the question is, how are they made and who makes them?

Since this book is about *Christian* leadership, we will look at the lives of some of the Bible's great leaders for some answers. These leaders were very different from one another. But they all had one thing in common: they became leaders after a profound encounter with God.

### LEADERS: DISCOVERED, FORMED, AND CHALLENGED

Let's begin with the Prophet Amos. There is no stronger, more powerful, or less likely preacher in the Old Testament. Amos was a simple shepherd and farmer who earned his living pricking the fruit of sycamore fig trees to hasten their ripening. Could one imagine in this day and age a more unlikely candidate for leadership? No Harvard Business School for him, no aristocratic childhood with education by tutors. Yet the Lord chose him to go and speak to his people Israel, in extraordinarily strong and forceful terms.

What about the Prophet Jeremiah? When the Lord asked him to go and preach, Jeremiah resisted. He complained that he was too young and could not speak in public. He had no gift of blarney, no training in homiletics or rhetoric. So how did he manage to become a great leader? The Lord put his own words in Jeremiah's mouth. And thus Jeremiah became a powerful preacher. The Lord *discovered* the prophets Amos and Jeremiah, and then gave them the tools and the words to lead.

Jesus' disciples were also discovered and called by him, one by one. They faced an even greater task than the prophets did. Jesus formed them during his three-year public ministry by means of his continuous teaching, healing, scolding, serving, suffering, and dying. It was not an easy job. They were difficult to deal with: they doubted, they deserted, and one betrayed. But in the end, except for one, they became true apostles. Later, the Apostle Paul was called and converted from the persecutor and zealous Pharisee Saul into Paul, the apostle to the Gentiles. Paul endured dangerous and weary voyages, imprisonments, and frequent disappointments in the newly formed Christian communities. At the same time, he experienced the joy of companionship with his fellow workers. All this *formed* their persons and apostleship.

After the resurrection and ascension, the Holy Spirit continued to inspire the first Christian leaders with the remembrance of all that Jesus taught them, not only by his words, but also by his life. The Lord *challenged* the disciples by the very facts of his life. The temptations of poor and inadequate leadership—exemplified by the betraying Judas, the denying Peter, and the doubting Thomas—were shown to be in direct opposition to the living example of the obedient-even-unto-death Son, the steadfast and loving Master, the faithful Servant of all. The challenge for Christian leaders today is to refer every idea, every action, and every feeling to the example of the one who said, “I came not to be served but to serve,” and who commanded us to love one another as he has loved us—namely, to give our lives for one another.

#### WORKING WITH OTHERS TOWARD THE KINGDOM

According to the Scriptures and the teaching of the Orthodox Church, the goal of the Christian life is union with God and eternal life in his kingdom, as persons and as a community. Persons and community go together. Jesus Christ declared that love for others is central to discipleship: “By this all men will know that you are my disciples, if you have love for one another.”<sup>1</sup> The early Church assumed that “one Christian is no Christian”

<sup>1</sup>Jn 13:35



(*Unus Christianus—nullus Christianus*).<sup>2</sup> St Seraphim of Sarov, a Russian saint of the late eighteenth century, stressed the importance of the personal acquisition of the Holy Spirit and also saw the enormous impact this could have on the community: “Acquire a peaceful spirit, and then thousands of others around you will be saved.”<sup>3</sup>

Leadership is not something done in isolation from others. It needs to be done within a community, with mutual activity on all sides. The glue that binds everyone together is the recognition that we are all subject to the ultimate leadership of God.

God is the real and ultimate leader, since he is our Lord and Master and King. We are his subjects, and we are guided by his commandments. We accepted those commandments when we entered the Church. We recommit to them every time we participate in the sacramental life of the Church. Each time we pray the Lord’s Prayer, we say: “Our Father who art in heaven. . . . Thy will be done, on earth as it is in heaven. . . .” This commitment reaffirms that we are subjects of his kingship and members of his kingdom.

However, kingship and leadership does not stop with God. In every age, the leadership of God in this world has been delegated to man, who is made in God’s image and likeness. In the beginning Adam was given dominion over the animals. Whatever he called a beast of the field or bird of the air became its name. In fact, the Lord God patiently waited “to see what he would call them.”<sup>4</sup> However, Adam decided to be a leader in his own right, with his own goals and ideas, not God’s. That did not turn out well for him, or for us. The Old Testament leaders Abraham, Moses, Aaron, David, Samuel, and the prophets all acknowledged their dependence on God. But whenever any of them became “independent of God,” calamity and tragedy inevitably ensued.

New Testament leaders similarly rose and fell depending upon their willingness and ability to follow God’s commandments. The writings of

<sup>2</sup>Georges Florovsky, *Bible, Church, Tradition: An Eastern Orthodox View* (Belmont, MA: Nordland Publishing Company, 1972), 59.

<sup>3</sup>Metropolitan Kallistos Ware, *The Inner Kingdom* (Crestwood, NY: St Vladimir’s Seminary Press, 2000), 133.

<sup>4</sup>Gen 2.19

the Apostle Paul are full of observations of how the leaders of the early Christian communities either cleaved to or departed from doing of the will of God. The Church fathers speak of both difficulties and victories within later Christian communities who sought to make their way to the kingdom while living within the confines of the empire. The Church has persevered to this day by seeking to do God's will. As Christians, we must work together as leaders to attain the promise of the kingdom.

Christian Leadership. It is loving one another. It is doing the will of God. It is striving together for union with God in his kingdom. We can put these concepts together into a definition of Christian leadership, as follows:

Christian leadership is the conscious working together in faith and in love, in a community of fathers and mothers, brothers and sisters, to do God's will on earth as it is in heaven, and to attain to the kingdom of God, in the love of the God the Father, the grace of our Lord Jesus Christ, and the communion of the Holy Spirit.

This "working together" implies that each of us in the "community of brothers and sisters" contribute our own divinely given gifts and talents. We work according to our own specific responsibilities, with some as "apostles, some prophets, some evangelists, some pastors and teachers."<sup>5</sup> All will be mutual servants of God and of one another. All will be leaders.

#### PLANNING TOGETHER

The title of this book refers not just to leadership, but to *strategic* leadership. A leader may lead in many different directions, but it is important to note that not every possible direction is appropriate or even useful. Strategic *planning* is the subset of leadership that establishes proper direction, objectives, desired actions, and mileposts. It enables leaders to be disciplined stewards of the responsibility placed in them by others.

The very notion of strategic planning may strike some as bringing a foreign and not necessarily comfortable idea into the Church. Over the

<sup>5</sup>Eph 4.11

years, I have heard many people say, “Planning is for business, not the Church.” I have also heard the statement, “If we had complete trust in God, we would not need planning.”

Our need—and indeed, our obligation—to do planning for the Church is not the result of a lack of trust in God. Rather, it is the recognition that the Lord has placed his trust in us, and he accordingly sets high standards of responsibility and stewardship. As he said, “You did not choose me, but I chose you and appointed you . . . [to] go and bear fruit.”<sup>6</sup> The commandments of God start from the greatest (“love the Lord your God with all your mind and soul and strength”) and the one like it: “Love your neighbor as yourself.”<sup>7</sup> This commandment of love and action demands from us constant self-examination, repentance, and recollection if we are to do, with God’s help, what he requires.

Strategic planning is an effort by the members of a community to undergo an examination of conscience—to measure themselves as a group, ordained by God to fulfill a particular purpose, as to whether they are in fact fulfilling that purpose. Having done this, they next determine God’s will for them and what the Lord wants them to do. Then, they actually go forward and do the Lord’s will seriously, with dedication and utmost honesty concerning their own weaknesses and their dependence upon the Lord in everything. They do all this in assembly, involving not only the members of the community but all whose lives are impacted by that community. Finally, the mutually agreed-upon, God-directed work is managed and performed carefully and properly, “decently and in good order.”<sup>8</sup>

God did not leave us with a blank slate, without direction or purpose. He has plans for us that he wishes us to follow: “For I know the plans I have for you, says the Lord, plans for welfare and not for evil, to give you a future and a hope.”<sup>9</sup> We know them also, especially from Scripture. St Peter, in his first sermon after the descent of the Holy Spirit at Pentecost, proclaims that Jesus was handed over to the Jews “according to the definite

<sup>6</sup>Jn 15.16

<sup>7</sup>Mk 12.30–31

<sup>8</sup>1 Cor 14.40

<sup>9</sup>Jer 29.11

plan [Greek, *boulē*] and foreknowledge of God.”<sup>10</sup> The best known instance of the “plan of God” is contained in the first chapter of St Paul’s Epistle to the Ephesians: “For he has made known to us in all wisdom and insight the mystery of his will, according to his purpose which he set forth in Christ, as a plan (*oikonomian*) for the fullness of time, to unite all things in him, things in heaven and things on earth.”<sup>11</sup>

Our plan in the church, and our plan for our ministry in the world, must be consistent with God’s purpose, counsel, and administration. We are to be united in him. Plans are foundational guideposts, lights, and compass bearings to direct us on the path to the kingdom. Those plans must be based upon God’s word, for as Jesus said, “Every one then who hears these words of mine and does them will be like a wise man who built his house upon the rock.”<sup>12</sup> Every plan of the Church must be based upon the gospel, then tested for consistency and alignment with it. It is not easy to fulfill this task. It requires commitment and discipline and working with others in openness, truth, and love.

## MANAGERS AS LEADERS

In most organizations, leadership is considered to be a separate category from management. For example, some experts say that leaders inspire, while managers merely organize. According to this model, the leader is considered “superior” in the organizational chart to the manager, just as a CEO is “superior” to a regular shop floor employee. However, management is in fact a subset of leadership and completely contained within it. A leader needs to know how to manage, and a manager needs to know how to lead. Both are critical.

Take the chairing of a meeting, for example. We might think that a manager chairing a meeting need only know how to keep time, how to exercise the rules of procedure the organization uses (e.g., Robert’s rules of

<sup>10</sup>Acts 2.23 The word *boulē*, translated in the RSV as “plan,” is translated in other versions as “determinate counsel” (KJV) and “set purpose” (NIV).

<sup>11</sup>Eph 1.9–10, RSV The word *oikonomian*, translated in the RSV as “plan,” means stewardship, administration, and management.

<sup>12</sup>Mt 7.24

order), how to follow the pre-determined agenda, how to appoint someone to keep minutes, and how to keep the meeting running smoothly. Many meetings are deemed successful when these objectives are achieved.

But while these things are important and indeed necessary, the chair must also be a leader if he or she is to maximize the meeting's effectiveness. The chair must tap the creativity of the participants and encourage them to be more than mere attendees, but also fellow workers. The chair must empathize with the participants, sensing unspoken thoughts, ideas, and unexpressed emotions that may hinder or help the work of the meeting. The chair must be able to depart sharply from the appointed agenda when the need arises. Finally, the chair must be able to bring the meeting to a close with a sense of unity and a mutually decided path forward.

It is sometimes said that leaders see the long-term, big-picture vision, while managers see only the short-term, daily details of ordinary life. Managers certainly need to deal with the details of ordinary life, but there is no such thing in the Church as "ordinary life." All is to be filled with the presence of God, and all is to be done in his name. There are no "ordinary" interactions with people. Everyone is to be seen as an icon of Christ, made "in the image and likeness" of God. There are no "ordinary" actions of our bodies, for as St Paul says, "Glorify God in your body."<sup>13</sup> Every action of ours is under the oversight of, and in service to, God. This stewardship to God applies not only to what we do, but also to how we do it.

Managers are delegated with responsibilities, just as Adam was given dominion by God "over every living thing that moves upon the earth."<sup>14</sup> The kings of Israel were given covenant responsibilities by God. David said of this responsibility: "I have kept the ways of the Lord. . . . All his ordinances were before me, and from his statutes I did not turn aside. . . . For he has made with me an everlasting covenant."<sup>15</sup> In our time, managers need to know about financial matters, compliance with laws and regulations, and ethics and misconduct. They cannot escape these often disagreeable responsibilities.

<sup>13</sup>1 Cor 6.20

<sup>14</sup>Gen 1.28

<sup>15</sup>2 Sam 22.22–23, 23.5

Managers must be skillful and encourage the skills of others. In the Exodus account of the building of the tabernacle, stress is placed upon the ability of those coming to help. Moses said: "Let every able man among you come and make all that the Lord has commanded. . . . and all women who had ability spun with their hands, and brought what they had spun. . . ." <sup>16</sup> In our time, managers need to know how to encourage others to bring their skills to the organization, while learning enough of those skills themselves to effectively oversee the work.

Managers need to have a generous and willing heart. The tabernacle story illustrates the enthusiasm and love that was in the hearts of those who built and . . . came, every one whose heart stirred him, and every one whose spirit moved him, and brought the Lord's offering to be used for the tent of meeting, and for all its service, and for the holy garments. So they came, both men and women; all who were of a willing heart. . . . <sup>17</sup>

All work must be an offering of love to God. In our time, managers need to know how to transmit this love to the people, to counsel their subordinates, to resolve conflicts, to come to common agreement even with those who disagree with them, to encourage others to contribute resources to support the common effort.

### ALL TOGETHER

Often, people make an artificial distinction between leadership, planning, and management. However, when considered strategically, these three fundamental tasks overlap considerably and one implies much of the other two. Although there are several separate parts to this book, each focusing on the tasks mentioned above, the best course is to read the entire text before applying any of the parts exclusively, and to avoid concentrating on one to the exclusion of the others.

<sup>16</sup>Ex 35.10, 25

<sup>17</sup>Ex 35.20-22

## I'm on a Board (or Council): What Do I Do Now?

I asked myself this very question some twenty-five years ago, when I was elected to the governing board of the International School of Hamburg, Germany. The question became even more urgent when that night, at the first board meeting, I was elected as chair. In retrospect, I wonder why I was not immediately concerned by that rapid promotion!

The International School of Hamburg (ISH) is a private school that offered K-12 instruction to some 500 children of over forty nationalities at that time.<sup>1</sup> It was and is a critical part of the international business scene in Hamburg, ensuring high quality education to international children whose parents were posted to that city.

The board was composed of some fifteen elected individuals, with a wide representation of parents and members of the business and diplomatic community, plus the headmaster and certain other school staff serving ex officio. The board chair had a statutory legal role, I discovered later, as the official representative of the institution before the courts if anything went wrong. That discovery definitely raised my level of concern.

Fortunately, I had some previous experience with a nonprofit board thanks to my strategic planning work with St Vladimir's Seminary, and felt comfortable enough accepting this responsibility.<sup>2</sup> I had two immediate

<sup>1</sup>ISH presently educates some 700 students of over fifty nationalities. See <http://assets.ishamburg.org/welcome/overview/>.

<sup>2</sup>I also felt a sense of obligation to "give back" to the school. Our youngest child had spent her last two high school years there and graduated with the International Baccalaureate diploma.

concerns: first, to ensure that my fellow members were united in their duty as a board; and second, to make sure that the school was financially stable, especially since Germany was in an economic recession at the time.

My first action as chair was to hold a one-day retreat/workshop with the board members. This occasion enabled each of us to perform self-evaluations as to our role on the board, to share our individual talents and expertise, and to ascertain the critical issues for the school and begin to address these. The workshop was very successful and received positive feedback. First-time-ever board members were especially appreciative, and became much less apprehensive about what they had gotten themselves into. Committees were formed to address current and potential future issues. In addition, individual members of the board confirmed that they understood their responsibility for the future of the school and their need to work together as a cohesive group. The board continued to meet in person almost every month.

My next action was to ask my vice-chair, the CFO of the German division of a major global conglomerate, to develop a five-year financial outlook for the school. The results of his investigation were shocking. They forecasted a significant and rapidly growing deficit that, if left unchecked, would result in major difficulties within several years. The major cause of the deficit was twofold. First, there was a dramatic increase in overall expenses, due primarily to rapidly escalating faculty costs. These costs were due to annual fixed-step salary increases, which had been contractually agreed to by previous administrations. Second, tuition revenues were significantly declining as international firms cut their expatriate postings in response to the recession.

Once we got over our initial shock and dismay, the board spent the next two years, individually and collectively, addressing and eventually resolving this financial problem in cooperation with the school administration, faculty, and staff. Such a resolution would have been impossible, in my opinion, were it not for the unified and cohesive efforts of the board, especially those members who worked closely with school officials, faculty, and staff.



## **NOW, HOW ABOUT YOU?**

Perhaps you have been asked to serve on the governing board of a church or other nonprofit organization. Maybe the position involves a commercial, profit-making venture such as an industrial corporation. Regardless, the principles remain the same, and build upon the definition of leadership in community already outlined here.

A governing board or council is a team of people with responsibility for an established institution, such as a church or school, or for fulfilling the mission of a charitable, service, or other organization. In all cases boards have what is referred to as a fiduciary (or “trust”) responsibility for that organization. Its members are answerable to the people that the institution or organization serves. Boards bear special accountability towards those who support the institution, especially through donations and gifts. The people who support the institution are usually called, collectively, the “constituency” of the institution. The board or council also has specific legal and ethical responsibilities according to the laws and regulations of the country, state, and political subdivision in which it operates.

Board or council members are normally brought together from widely disparate backgrounds, experience, and capabilities to accomplish a task that would be impossible for any one of them to achieve alone. In the case of ISH, our board members were of German, English, French, Swiss, American, Australian, and other nationalities. Some were executives, some teachers, some parents. Typically, they brought different perspectives to the table. Sometimes they did not agree and discussed differences of opinion at length before reaching a resolution. But the benefit of having a wide mix of people is that there is usually no shortage of good and creative ideas.

Later chapters of this book will discuss particular areas of responsibility such as ethics, finances, human relations, project management, and fund raising. The rest of this chapter will focus on the fundamental strategic nature of a board, and what it must do and be to operate most effectively. First, we will address two myths about what boards are—and aren't.

**MYTH NUMBER 1: THE “RUBBER-STAMP” BOARD**

Let us quickly dispose of the first myth. The board has the critical task of governance of its own institution or organization. It is never simply a rubber stamp for the administration. Similarly, a council or committee has the responsibility to question and perhaps recommend change or, alternatively, to endorse current directions. These responsibilities cannot be shirked; they rest upon the shoulders of everyone on the board, and can be neither hidden nor dispersed to others.

**MYTH NUMBER 2: MICROMANAGEMENT**

Although the board has governance responsibilities, it knows full well that it must delegate responsibility in certain areas, and within certain constraints, to the administration of the institution. The board asks questions, which sometimes gets uncomfortable for the administration. A defensive response may be the accusation that the board is “micromanaging.” This charge normally gets the board to back off, and is thus quite effective from the administration’s viewpoint. However, if an administration has to utter this curse, in my opinion it is already guilty of not providing sufficient information to the board about operations, or there is something that a board member “smells” in the operations that he or she has smelled before somewhere else. It is a warning sign, and should not be ignored.

Some experts advise boards to operate “noses in, fingers out.” In other words, ask questions but do not meddle. This is not a bad maxim, but I would caution that certain noses are bigger than others. The bottom line is that sufficient trust, respect, and communication should exist between board members and administration to the extent that such concerns do not arise. If and when they do arise, some meeting of the minds needs to be found.

We will now touch on some of the key strategic responsibilities of the board. Boards are sometimes regarded as “top management.” While this is certainly true, they are in fact leaders of the organization.

**THE THREE JOBS OF THE BOARD:  
OVERSIGHT, SERVICE, AND SACRIFICE**

My overarching goal is to relate management issues to the Christian foundations of leadership outlined in earlier chapters. Let us now examine how the management tasks of the board relate to the three vocations and ministries of the bishop, deacon and priest: oversight, service, and sacrifice.

1) *Oversight*. The board exercises oversight, as a bishop exercises oversight. In the New Testament, the bishop looks after, cares for, and visits others to see how they are doing. There is a visceral, intimate relationship between the bishop and his flock. In the same way board members, both individually and collectively, must have this same relationship with their institution. In the parlance of board governance, this is called the duty of loyalty and the duty of care.

The duty of loyalty means, at minimum, that there be no conflict between a board member's own interests and those of the institution. Should such conflict arise in a particular case, the board member must recuse himself or herself from any decision regarding the case. Ideally, the board member should feel that the interests of the institution and his or her own personal interests coincide. That is, one works for the organization as if one is working for oneself.

The duty of care means that a board member is disciplined in undertaking the responsibility of oversight. He or she takes the necessary steps to understand the workings of the institution and whether things are going well, or not. At a fundamental level, it often means making painstaking efforts to understand the physical and financial performance of the institution, and as well the sometimes more difficult to grasp question of whether the institution is fulfilling its mission and responsibility to its constituency.

2) *Service*. The usual language for board membership is "board service." One is not simply "on" a board; one "serves" on a board. In the Church, the deacon serves, willingly doing whatever is necessary for the flock and caring nothing for himself. He serves without pride, position, or prestige.

Through his example he inspires others to serve as well, and to do what needs to be done even before being asked. His whole life is service.

Individual board members who reflect this diaconal image are those who volunteer for projects, who ask for work, who say “I’ll do that” whenever someone needs help. They are not content to be listed on the roster of board members and to include that fact on their CV or resume. They are not comfortable attending only two or three board meetings a year and remaining silent and uninvolved. They are driven to be involved, to help, to serve.

3) *Sacrifice*. Nonprofit institutions generally need a consistent supply of funds. Typically, board members with significant financial resources are among those invited to serve. It is also typical and desirable to ask individuals to serve who have expertise in areas of need to the institution, e.g., financial, managerial, legal, etc. This calls for sacrifice on the part of the board members.

We spoke earlier about the vocation of the priest in the Church. He is the one who is willing to suffer and die for his people. The priesthood is not a “job,” but a sacrificial vocation. In the same way, board service implies willingness to make sacrifices for the institution. Many times, this means money in the form of major gifts. At other times it means a significant sacrifice of time and effort for the institution. Board members involved in the development of a strategic plan or the initiation of a capital campaign, in particular, should expect to make that effort *the* major personal time commitment after their day job and family.

### FIDUCIARY RESPONSIBILITY

Most nonprofits are incorporated in a state, and also enjoy a tax-exempt status granted by the federal government. This status means that there are many laws and regulations that must be followed by the institution. The board bears fiduciary responsibility for the institution before the respective governments, and also its constituency. The word “fiduciary” stems from the Latin *fiduci*, meaning “trust,” and thus implies a relationship of trust. That is, the institution and its constituency place their trust in the

board. In some institutions, the board members are accordingly termed “trustees.”

Some states spell out the fiduciary responsibility in government documents. A duty of obedience can be added to the above-mentioned duties of loyalty and care. This means that board members must ensure that the institution complies with all applicable laws and regulations governing the institution, as well as its own internal governance documents and policies. This is a serious responsibility. Many nonprofits hold so-called directors and officers insurance policies, and indemnify the officers and directors within the constraints of their own financial capability. However, board members must still ensure that they, individually, have in good faith and with an expected level of discipline satisfied the duties of loyalty and care described above.

#### **A TEAM OF LEADERS**

It is convenient to view the chair of the board as *the* leader. After all, he or she normally convenes and chairs the meeting. However, such an identification of the board chair as the *one and only* leader is a fallacy for a high-performing board. In such a board, every member is a leader. No one follows the chair in a subservient sense, saying to himself “Well, that person is the chair. We need to do what the chair says.” Not surprisingly, there is a great temptation to do just that. Often, board members who view their position as an honor, something to add to their resume or CV, may think this way. It is always easier to go along with the crowd or, more often than not, to follow the position of the board chair.

Each member of the board needs to take on the responsibility of being a leader on the board. Ideally, statements on institutional mission, vision, goals, and objectives have been established by the board in a strategic planning process, as previously described. However, if such a process has not yet occurred, then each board member is responsible for insisting that such a process take place. Once these objectives have been established, board members must see to it that appropriate actions are undertaken to realize them.

Within a board context, being a leader does not mean having a big mouth and interjecting and objecting every five minutes during a meeting. It means taking a serious responsibility for the work of the board. It means learning about the institution sufficiently to speak knowledgeably about its problems, issues, and opportunities. It means understanding the constraints under which the day-to-day administration and staff labor. It means experiencing deeply within oneself the vision and mission of the institution—to feel in one’s gut the institution’s yearning to succeed in its appointed mission and achieving its agreed-upon goals and objectives.

Everyone serving on the board is there for a reason. Everyone has expertise and experience which can profitably be brought to bear upon the issues before the board. New members of the board are especially subject to shyness and may not want to ask a foolish question which could expose their ignorance of the institution. Someone early in my career said to me, “The only stupid question is the one you did not ask.” They were absolutely correct!

We spoke earlier about humility as a leadership characteristic. Board members must be humble, although this does not imply remaining silent in the background, unnoticed. It means having the courage to ask a question or make a point that others might consider foolish, ignorant, or otherwise uncalled for. In a practical sense, humility is all about being unafraid of others’ opinions of oneself, and never being prideful or concerned with protecting one’s image in front of others.

### THE BOARD CHAIR

In 1994, I was asked by Exxon management to lead a team to develop a plan for a major manufacturing and marketing presence in the Peoples’ Republic of China within ten years. Most people I spoke with at the time believed this to be an impossible task, if not a fool’s errand. China had no foreign joint ventures in this integrated industry segment—in fact, it was forbidden by law. Nonetheless, this was the task set before me. Fortunately, I was not alone. Exxon management had gathered a number of experienced Exxon executives from the USA, Singapore and Hong Kong

to be members of my team. I could not have asked for anything more. We had experts in planning, marketing, refining, chemicals, engineering, and negotiations along with fluency in Mandarin Chinese, especially the commercial and technical language.

This sounds a bit like the experience I described before, when I joined the school board in Hamburg, right? When we first gathered as the China Study Team, everyone turned to me to see how I wanted to proceed with this grassroots, from-the-beginning exercise. I was greener than any of them concerning China. Fortunately, my ignorance proved beneficial to the team.

I began with an all-day, no-holds-barred session at which we brainstormed various approaches to starting a business in China. We were not talking small potatoes here; we were speaking about a multi-billion dollar project. This project was very important to Exxon, and management was depending on us to deliver. In the end, we decided upon an approach completely different from that of any other oil company in China. We knew we did not know much about China and decided that the only way to learn how to do business was to do business. We fanned out across China and worked with numerous state-owned companies with the intent of understanding their goals and seeking overlaps with what Exxon was looking for. We worked very seriously to reach agreement with each potential partner on commercial and technical terms. At times, we were negotiating several opportunities simultaneously. The team members and the Chinese learned a lot about each other in the process, which served all of us well. More on this aspect will be included in the chapter on negotiations.

The end result was a successful agreement to develop a joint venture in Fujian Province, China. Participating parties were two Chinese state-owned oil companies, plus Saudi Aramco and Exxon. The project has been operating for several years now, with a total estimated investment of five billion dollars. The commercial terms are much the same as the ones negotiated by our team in the mid-1990s.

Why were we successful? Why was this venture the only one of its kind in China? I firmly believe that it was due to the leadership team in place at the time of those first efforts, as well as the ones that followed. We listened

to one another. We listened to our colleagues in the USA. We listened to our partners, Saudi Aramco and the Chinese companies. We endeavored to understand where each of us was coming from. We were humble in setting forth proposals that might not be welcomed at first by others, trying to push the envelope. We did not become upset when our best ideas were rejected, sometimes summarily. We welcomed the contributions of others, even when their ideas were different from our own.

Sometimes others' ideas did in fact prove to be better, further adding to our humility. I recall a conversation with a senior Exxon manager, a towering and intellectually powerful figure. I mentioned that the Chinese-proposed design for a particular aspect of the proposed refinery was different from the one recommended by our own expert engineers. He refused to believe that our own thinking was *prima facie* better than that of their engineers. He asked, very simply, "Why do we presume that their design is inferior to ours?" We took a much harder second look, and agreed that he was right. The Chinese-proposed design was adopted.

In 2000, at a major turning point in the negotiations and technical development of the project, our team held a celebratory luncheon. At this time I was not the leader of the team, but had been called in to assist in the negotiations. In my congratulatory remarks, I quoted Lao Tse in the *Tao Te Ching*: "When the work is done and the objectives fulfilled, the people will all say, 'We did it ourselves.'" This is the true objective of the leader of leaders: empowering others to accomplish more than they think that they are capable of.

The board chair must see himself or herself as the leader of leaders. He or she must strive to ensure that every member has an opportunity to contribute. No one must be left out. If one person is not contributing, the chair must ask, "How do you feel about this? How would you do it differently? What does your experience tell you?" The board chair must be familiar with the background of each member: academic credentials, work experience, interests, family, desires, passions, etc.

Early in my Exxon career, I was fortunate to participate in several leadership seminars and workshops. One workshop leader had us watch a 1973 academy-award winning video of the Los Angeles Philharmonic under the



direction of Zubin Mehta, as they prepared to perform Ravel's *Boléro*. The video had me spellbound as I saw the individual musicians come together, each masterful in their own right, to get ready to perform—and performing—under the insightful baton of Maestro Mehta. The short interviews with the musicians and the conductor were priceless, displaying their humanity, their focus, their emphasis on high standards, and their determination to work together in community, in perfect harmony. The Philharmonic truly became more than the sum of its parts. The film marked a turning point for me in my understanding of leadership.

This image of the dedicated symphony conductor must be reflected in the board chair. Otherwise, neither harmony nor true pitch will be present; instead it will be cacophony—or silence.

### COMMITTEE CHAIRS

Board work is not carried out solely at semi-annual or even monthly formal board meetings, but typically by committees. Committees get a bad rap sometimes. A common joke is that committees are composed of people who can accomplish nothing by themselves, but come together to say definitively that nothing can be done. However, my experience is that committees, properly constituted and tasked, can perform amazing things.

The key to performance is the committee chair and how he or she works with its members. Again, consistent with the role of the board chair vis-à-vis other board members, the real actors are the members, not just the committee chair. First and foremost, the chair must orchestrate the performances of the individual members. This means facilitating their contributions to the work of the committee. The chair must understand the capabilities and special expertise that each member brings to the common work of the committee. In an ongoing committee, it may be difficult for new members to come up to speed rapidly. This issue can be addressed by assigning an existing committee member to serve as a mentor to the new person.

Furthermore, committee roles and responsibilities need to be carefully spelled out and documented. Such a document should not be static but

subject to review and periodic updates. Similarly, the goals and objectives of the committee need to be discussed at committee meetings at an appropriate time of the year, perhaps before and after each board meeting. Plans for the committee over the next several months can then be reviewed with the board and adjusted accordingly following that review. For example, cooperative efforts with other committees may need to be undertaken as a result of the full board discussions.

### BOARD EDUCATION

It is critical to conduct board educational programs, and on a continuing basis. These can be one-day retreats, special focused workshops or seminars, provision of reading material, links to outside board governance websites, and so on. Retreats and workshops in particular can help board members periodically reflect on the vision, mission, and values of the institution and their own adherence to them. We all need to be reminded from time to time of why we are serving as board members, and of the trust that has been placed in us by others.

New members especially need access to materials covering the history of the organization and previous activities and decisions of the board. Well before undertaking any board responsibilities each new member should have in his or her possession a minimum of three years' worth of board minutes, financial statements, operational performance reviews, and stewardship reports. The new board member needs to hit the ground running and not be shy about asking questions and offering ideas. Time is of the essence in transitioning a board candidate into a contributing and effective member. New members need to be welcomed enthusiastically by all—especially the board chair—and encouraged to participate.

A well-designed and maintained board member's handbook can be of great value to new and old members alike. Such a handbook provides details about the individual and collective responsibilities of board members, including the statutory, legal, and regulatory requirements. Descriptions of board committees and membership rosters with contact information help keep people informed of board activities and encourage

mutual communication. Summaries of past strategic plans and the historical development of the institution are also very useful.

Time must be set aside at every board meeting for calm and reasoned discussion of strategic issues. This is not easy to do, especially for boards that meet only two or three times a year and whose members are geographically dispersed. Nevertheless, such discussions are an essential requirement for an effective board. The responsibility for creating this time rests with the board chair and the executive committee of the board, if one exists. If the board's meeting time can be lengthened by an afternoon or a day, well and good. If not, then other agenda items must be removed, or addressed more efficiently.

Preparation of meeting documents and committee reports should be completed well before a board meeting in order that materials may be disseminated in sufficient time to enable the board to deal efficiently with routine items. Each report should clearly specify the action to be taken by the board on items on the agenda for discussion and/or committee recommendation. Tight control must be exercised on the length of materials presented to the board; for example, a committee report ought to be summarized on one page. Three sections usually suffice to cover the committee's accomplishments and disappointments in the past reporting period; its plans for the next several months; and any actions recommended for full board consideration at this meeting. The committee might also use this last section to obtain a sense of the board's perspective regarding a particular issue on which the committee has been working, rather than a request for a board decision on a final recommendation.

## **BOARDS AND CONSTITUENCIES**

No institution exists for its own sake. Institutions exist to serve others. We call those "others" the institution's constituencies. In the case of a church, the constituencies are the parishioners, employees of the church, the donors and benefactors, those impacted by the church's outreach and educational services, the neighbors of the church, and other nearby parishes. In the case of an educational institution, such as a seminary, constituents

include the students, faculty, various church bodies served by the seminary, donors, and the greater society served by retreats and educational offerings such as published books by the faculty.

Boards need to be linked to these constituencies in order to understand their needs. How well does the institution serve its constituencies, and how it might better serve them? In some cases, a link to a particular constituency is obvious, such as the bishop of a certain jurisdiction or the director of the church school. However, the board member needs to represent every constituency equally, keeping the best interests of all of them at heart. In order to do this, the board member must monitor institutional performance versus the needs of various constituencies. This interaction can best be done by careful listening and an openness to how the constituencies respond to what the institution is doing. Mayor Ed Koch of New York City was famous for asking, "How'm I doing?" as he walked the streets of the city. Unfortunately, board members sometimes become defensive in the face of criticism, even if it is justified. This reaction needs to be avoided to the greatest extent possible.

An organized approach to constituency-linking often can be made through the various board committees. For example, a fundraising or advancement committee might have its members frequently call or visit donors to thank them for their gifts, ask for their advice, and solicit comments on how the institution is doing. Buildings and grounds committee members might walk around asking students or parishioners what they think about the facilities. Academic or church school committees might ask faculty, students, or parents what they think about the education being offered. Communications committee members can solicit their friends and networks for opinions of the institution's website. The key is to not remain self-enclosed, but to continuously seek feedback from others.

## Meetings, Meetings, Meetings: How to Facilitate Collaboration

My normal work day at Exxon was filled with meetings. Many of them were informational, with one group telling others what they had done: a strategy study, a technical project completion, a financial report, etc. Some meetings, however, were aimed at making decisions. How will we do this? Who should do it? When should it be done by? I always enjoyed the decision-making meetings the most. On the other hand, whenever I received an email stating that an informational meeting had been canceled, I jumped for joy, happy to add one or two more productive hours to my workday. Perhaps most people feel the same way.

Is this attitude fair? Is it right? We constantly hear that we are now in the information society. Knowledge is power, we are told. So why do we feel bored when we are asked to attend an informational meeting intended to fill us in on achievements that some other group has made? The reality is that we are usually passive absorbers of information and not contributors. We ask questions, and the presenters answer them. Everything is very polite.<sup>1</sup> But seldom are we expected to be full participants, contributing whatever we can offer. As a result, there may be no added value from our presence which might accrue to the presenters.

<sup>1</sup>Offering challenging questions at such a meeting could result in one's not being invited to the next presentation. Of course, that might not be a bad thing.

A meeting should be a gathering of leaders. It should not be teachers lecturing students. Nor should it be a thesis defense, with a candidate trying to persuade a faculty as to the worthiness of his or her research.

Many high level board reviews are like this, however. At meetings of top-level management or executive committees of corporations, we find two categories of people: those who propose recommendations, and those who decide or dispose. But there is often a third category—those who sit on the sidelines waiting to see which way the management wind blows. While these reviews are a necessary fact of corporate governance, the process can be made much more effective. The key is collaboration.

Many years ago, I performed a major strategy study on Exxon's operations in a certain Asian country, which proposed significant changes to our corporate structure. The time came for me to present my findings and recommendations to the regional executive management for the Asia-Pacific region. I was personally familiar with many individuals in our regional office who had held high-ranking positions in that country in the past. I thought it beneficial to invite them all to the presentation, despite the fact that they had no direct managerial or decision-making responsibilities for that country any longer. Since they had worked there and knew what the business was like, we could not help but benefit in our discussion from their experience and insight. That was the stated basis of my invitation.

The regional CEO was surprised to see so many people at the presentation, but he understood why they were invited. Needless to say, we had a spirited discussion with many different viewpoints expressed and considerable insights shared. The quality of our eventual recommendation was greatly enhanced by the presence of people who were invited not merely for the sake of informing them, but so that we could seek their input. As a side note, many of them came up to me afterward and said that this meeting was the first time in years that they had been asked to contribute to anything regarding their previous managerial and executive experience with that country. They thanked me profusely for, in their words, a very enjoyable afternoon.

This story encapsulates the true objective of a meeting: to be collaborative and enjoyable. If people feel left out and passive, it is a failure. If it is

dull and boring, it is a failure. If participants are involved and enjoy the meeting, then it is a success.

### HOW TO CONSTRUCT A MEETING

Yes, you heard right—how to *construct* a meeting. One does not just hold or call a meeting; one must construct it. A meeting must be designed and built. It must meet certain specifications and deliver the desired outcomes: a set of decisions, an increased sense of unity, agreement on the path forward, etc. The meeting must be done on time and within budget.

Before going any further, let's talk about time. How many people say, after leaving a meeting room, "Now, that was a waste of time!"

I worked for four years with Exxon in Hamburg, Germany. I arrived a few minutes late to my first meeting with my fellow managers and directors. I was never late thereafter to *any* meeting. Promptness and respect for others' time was a foremost attribute of Exxon management in Germany. Anyone who arrived late entered the meeting room quite abashed, with everyone looking at him or her. A formal apology must be said aloud: "*Entschuldigung fuer die Verspaetung* (apologies for being late)." Naturally, there were very few instances of people coming late to meetings. Everyone arrived early, ready to begin work on time. Furthermore, if the meeting was scheduled to last one hour, it was adjourned within exactly sixty minutes.

Years later, I returned to the United States and observed the opposite behavior. Some twenty senior managers and advisors had gathered together and were waiting for the chair of the meeting to arrive—which he eventually did, ten minutes late. I admit to having been a bit exercised about this, having not yet recovered from my German experience. I did suggest to that individual privately, and in apparent jest, that we ought to have a time clock, which everyone would punch into, stationed at the entry to each meeting room. This clock would be connected to the HR salary database of each person and feature a prominent digital display to show just how much this meeting costs in terms of personnel—especially the

cost of keeping people waiting. I did see some improvement in the chair's on-time arrival performance thereafter.

A meeting is a gathering of leaders who respect each other's time and potential contributions. It is apparent to everyone when that respect is absent—when others' time is squandered and their experience and expertise ignored. Such meetings usually fall short of what they could be. On the other hand, when respect is given, major accomplishments can be expected.

Everyone assumes that the chairperson, or the person who convenes the meeting, is the one who designs the meeting. An agenda is normally distributed either shortly before the meeting or at its very start. Most times the agenda is just a list of topics that the chair ticks off as they are discussed. The meeting participants might add one or two items, but control of the meeting is pretty much left up to the chair. The critical question is: who owns the meeting? Who bears responsibility for its success or failure? Most people would say it is the chair, but I submit that responsibility belongs to everyone in the meeting room, without exception.

#### A CHECKLIST FOR MEETING DESIGN

Let us revisit the six goals of Christian leadership that we discussed in earlier chapters. How might these give us insight or guidance as to how a meeting should be designed?

- Christ and His Kingdom
- Examine and Rediscover Our Values
- Focus on, Care for, and Love Others
- Be Humble
- Desire to Serve, Not to Be Served
- Remain Steadfast in Tough Times



*Christ and His Kingdom*

Now are we going to run into trouble right off the bat? Let's say that one works for a secular company such as a government agency, factory, or maybe a marketing firm. How is it possible to start with Christ and his kingdom? Isn't there a huge gap between working for a particular organization in our particular job, and believing in Christ? Shouldn't we keep them separate?

The call of Christ and his kingdom compels us to view every moment of our lives and every encounter with others with the utmost seriousness. Christ is present at every moment and in every encounter, regardless of where we are and who we are with. Thus, when we decide to construct a meeting, we must view its purpose as ultimately serious and part of the building up of the kingdom of God—even if said purpose is designing a new website for marketing some product like, say, a new breakfast cereal. The key consideration here is two-fold: first, the impact of the meeting upon the end goal of the meeting (the website), and second, and more importantly, the impact that the meeting will have on the lives of the attendees.

What would be a Christian approach to this seemingly "secular" meeting goal? We could, for example, insist that the website be as good as possible: attractive, appropriate, and easy to use. It should have no broken links that unintentionally frustrate the people who log in to navigate it. It should be honest and not deceptive. As much as possible, it should be done to the glory of God. Depending on the company that one works for, this last desire may not necessarily be expressed aloud. But we should still feel it within and give thanks to God when our labors succeed.<sup>2</sup>

Second, everyone who attends the meeting should feel engaged and valued. They should come away with the sense of having done something

<sup>2</sup>Our China team held many negotiating sessions in Guangzhou with our Chinese counterparts regarding a potential joint venture there. One particular time, we had traveled from Hong Kong by train all morning. On that trip I had been reading a book entitled *His Life is Mine* by Archimandrite Sophrony. That little paperback had a large full-color icon of Jesus Christ on the cover. One of the Chinese saw it and exclaimed, "You brought your God with you!" I said, "Yes I bring him everywhere." Christians need to make God present wherever they are by their thoughts, prayers, and actions.

important—of having experienced the joy of working together with others to create something greater than the sum of the parts. They should feel love, each in their own way.<sup>3</sup>

### *Examine and Rediscover Our Values*

There are two major areas to concentrate on here. First, what is our motivation for calling this meeting? And second, are we planning to construct this meeting on our own, or are we subjecting its design to the counsel of others?

First, let's talk about motivation. Is this meeting an opportunity for us to display our own accomplishments? Is it designed to obtain the agreement of others on our recommended plan? Are we hoping for a "rubber stamp"? Will we welcome and invite criticisms, and if so, how extensively are we willing to allow others to criticize? What should we say in the meeting invitation to set the scene for our desired outcome?

There have been occasions when I failed to undertake this kind of self-examination before a meeting I had called. Nevertheless, I still expected to receive appreciation for my efforts and praise for the outstanding work that I had done. When I did not receive those plaudits, I was disappointed. In some cases, I reacted to criticisms in an unfavorable way.

I was taught a lesson many years ago when presenting a certain project proposal to the CEO of our international company. This particular refinery investment proposal had been presented to him several times before, and he always raised questions. After each such occasion I went back to my office, considered the objections (which were usually well-taken), and worked with the refinery people to modify the proposal accordingly. Finally, the time came when I presented the "perfect" proposal—the one I was sure he could not reject, and for which he would therefore be compelled to release the necessary funds. Well, he did not reject it, exactly, but he seemed annoyed that he was unable to come up with any reasonable objection. Whether he simply did not like that refinery, or perhaps the

<sup>3</sup>As I write this, I am listening to the words of Coach Mike Krzyzewski of the Duke basketball team, on the day after they won their fifth NCAA title. Coach K said this about his team: "I love those guys." That's motivation.

people managing it, I never knew. At any rate, he threw the presentation papers across the table at me and said, "OK, you got your money."

I thanked him, took the papers, and left the board room accompanied by my immediate manager. I was clearly upset by the CEO's rudeness. My manager, being wiser than me, recognized this and said, "Look, you got what you came for. You got the funds for the project. Be happy with that." However, I had not gotten what I came for. I wanted the project to be approved, yes, but I wanted it on my terms, including the praise and thanks I did not receive.

I was wrong, and short-sighted. Later on in my career, in very difficult and exhausting international negotiations, I learned to carefully analyze upfront what I wanted to obtain from a meeting. I stopped throwing the kitchen sink (especially praise and thanks) into the specifications. I learned I could even suffer antagonism, anger, and arrogance without losing my focus on what was necessary. All of these lessons required me to identify the not-so-positive values of mine which stood in the way of achieving my fundamental objectives.

Now let us turn to the question of how meetings are planned. The best meetings are the ones we plan not in solitude, but in collaboration with others. I am not talking here about sharing the agenda in advance with participants. This worthwhile exercise should certainly be carried out in most cases. However, there is no substitute for the counsel of others when constructing a meeting. Many times we have blind spots when it comes to the attitudes of others, or in how we regard others. A trusted counselor can be very helpful in identifying those blind spots. Often, we can work on this area with a peer.

The construction of a meeting should generally be performed in a low-vulnerability environment, which helps to improve co-worker relations. In many cases a subordinate might fulfill this role. Side benefits such as increasing mutual trust can accrue from enabling subordinates to speak up, especially in situations where one needs help and fails to recognize it. I have been extremely fortunate in having supervisors who allowed me to offer frank and open suggestions not only on proposals, but also about the supervisor's relationship with other managers.

The next example demonstrates what can happen when one does not ask for others' counsel in advance.

*Focus On, Care For, and Love Others*

My first expatriate assignment was in Tokyo, Japan. I was called in to lead a small team to perform a strategic study on the development of a major import terminal in Japan. I set to work immediately, developing a process for gathering data from other divisions in the company, analyzing the data, and coming up with the best solution for the project. After a few weeks I called a meeting of the various company department and divisional managers to explain my recommendation.

It was a strange meeting. I gave my presentation and, after I finished, asked for comments. No one said a word. I asked if there were any objections. No one said a word. I asked if anyone had anything to add. No one said a word. I said thank you. Everyone got up, bowed politely, and left, all without a word.

What happened? I failed to focus on, let alone care for and love, those managers. I had not bothered to ask in advance how decisions were made in Japan, nor how agreement is reached. I foolishly thought that my way was the best way. Only later did I find out about the Japanese way of *nemawashi*, which was the process that I should have followed well before approaching anyone in management with my ideas.

*Nemawashi* means literally "going around the roots." The Japanese gardener usually has great success when transplanting a tree. He first cuts around the roots, then trims the foliage. He prepares the hole to receive the transplanted tree far in advance of the actual transplantation, carefully choosing the season and the day. In fact, he may perform cutting and trimming several times over a period of months for the sake of a better transition. The tree usually survives and thrives. Contrast this approach to that of impatient American gardeners like me, who dig up and transplant a tree in one day, and then get disappointed or even angry when it dies.

In Japan, managers expect people to share ideas with them well in advance of making any proposal. They expect to have a hand in trimming the branches, cutting the roots, and preparing the soil. If this is not done

(as I was told later), the proposal may likely be rejected out of hand. Fortunately, this outright rejection did not happen in my case. The Japanese managers were far more polite to me than I was to them.

I was abashed after hearing what I should have done but did not do. In fact, I felt quite dumb. So, over the next month or two, I set up person-to-person meetings with each of the department and divisional managers in their offices. I began with small talk about when and how they joined the company, their experiences, and how they viewed current company operations. In short, I expressed my sincere and personal interest in them. I focused on them. I requested their ideas for my project. I asked them for advice. It was an enlightening exercise. It also allowed me to gain their trust and respect. After that, senior managers who brought proposals to the board would insist that their subordinates review any proposal which even remotely touched on my own area with me beforehand, and obtain my signature on the proposal.

The lesson here is simply to know our audience in a way that gives us insight into their customs, backgrounds, needs, and ideas. If that knowledge is coupled with a genuine and sincere caring for them—along with a striving to make any gathering of individuals into an experience in shared accomplishment and community—it will work wonders.

### *Be Humble*

At this point the reader might be wondering, “How in the world will being humble help me to better construct a meeting?” It’s a good question. The title of this chapter is “How to Facilitate Collaboration.” Attitudes can either foster collaboration, or kill it. The person who approaches the construction of a meeting with humility places himself or herself in an enviable position—that of being completely indifferent to what others think or say with regard to his or her inner personhood.

Our inner person, no matter how exalted our position, title, or status, is fundamentally fragile. From the beginning analyst to the highly experienced CEO, we all have inner egos that can be offended. To prevent this, we create a wall (thicker for some, thinner for others) intended to protect us against any damage to our sensitive egos.

I once knew a manager in Europe whom people described as “prickly.” He really was rather like a porcupine. Other employees had to dance around him with kid gloves so that he wouldn’t get his back up and let the spines emerge. Meetings with this person were naturally a bit difficult, and it was especially hard to try out new ideas or brainstorm with him. I had another colleague, this time in the Church, who automatically said “no” whenever anyone questioned the way something was done, or suggested a new approach. He was usually on the defensive. A more humble and open attitude would have resulted in more effective collaboration.

In Chapter 4, we discussed how Christ made himself “a person of no reputation” as an example of what being humble means. Of course, all of us have reputations, although they differ depending on the person to whom we are speaking. Our mothers see one side of us, our spouses another; our bosses notice one aspect and our colleagues yet another. But when we assemble as a group in a meeting, we need to have no reputation in order not to distract from the collaborative nature of the work.

In the monastic literature, a story is told of a young monk who asks an elder what it means to be perfect. But in this case the younger monk was perhaps trying to heed the command to “be perfect as your Father in heaven is perfect.” How did the elder monk respond to the question? He asked the younger to do something. “Go to the cemetery, and speak to the monks buried there. Praise them. Tell them how wonderful they were, what ascetic exploits they performed, how they were shining examples to others!” The young monk did so and then returned to the elder. The elder asked, “What did they say?” The younger replied, “Nothing.” Now the elder said, “Go back and curse them. Tell them what sinners they were, how they disappointed everyone!” The young monk did so and returned to the elder. He asked, “What did they say?” The younger replied, “Nothing.” The elder monk smiled and said, “Perfect.”

To refuse to be anxious about a meeting or worry about what the outcome will mean for one’s reputation, to be unconcerned when one is criticized, never to be puffed up when one is complimented—these are all manifestations of humility. Humility frees us from that inner tension

which sets up defensive walls between us and others, and causes creativity to be stifled and collaboration to be thwarted.

*Desire to Serve, Not to be Served*

We may have a hidden agenda when we call a meeting. Perhaps it is to show off, to publicize our own accomplishments. Perhaps we hope to ramrod agreement on a controversial decision and bury potential dissent from others. Perhaps our goal is simply to get our way on a particular issue, despite the knowledge that others may have different thoughts. These hidden agendas distract and detract from any collaborative possibilities at the meeting.

The constructor of the meeting needs to be the servant of the meeting participants. He or she must serve the overall objective of the gathering. This normally works best in the case of participants who share common values. But what happens when the meeting involves people from two different and competing organizations? Doesn't this necessarily imply an adversarial relationship? How can one side view itself as serving both parties at one time?

International negotiations present particular difficulties in finding common ground. Many things are different between the two sides involved in discussion: culture, language, values, corporate personalities, and, yes, even what is considered ethical behavior. These differences need to be surmounted as much as possible. Unfortunately, often the two sides look out only for themselves. This leads to increased tension and difficult negotiations. Solutions can and often will be reached, but perhaps not without lingering animosities between the participants.

My own experience has been that if we take the radical approach of trying to serve the best interests of both parties, these differences can be reduced and even overcome. It will not be easy, since the other side may be quite suspicious of our intentions. In China, we almost always began a high-level meeting, especially with governmental officials, by emphasizing two presuppositions, namely, mutual respect and mutual benefit. By so doing, we tried to go beyond what is "mine" and "yours" to what is ours, at least potentially.

*Remain Steadfast in Tough Times*

Even when we apply the principles outlined so far, meeting success is never guaranteed. Meetings can go south in spite of the best intentions and most thoughtful planning. For example, sometimes two participants will ignore the agenda and use the occasion to attack each other or to bring up old grievances. It gets worse if one decides to mediate. This rarely ends well.

The process can be likened to a psychological game called Persecutor-Victim-Rescuer. This cyclic game is usually played to disastrous outcomes for the participants. It works best in families with long-standing grudges and unforgiven offenses. One person starts by criticizing another, the more unfairly the better. The criticizer or attacker is the Persecutor, the attacked is the Victim.

Now you enter the game as the head of the meeting in which two people begin to have at it. You are obviously the most reasonable and emotionally gifted person there, so you decide to intervene, usually on behalf of the Victim. You are the Rescuer. So far, so good. However, the Persecutor interprets your defense of the Victim as an attack on him or her, and you turn into the Persecutor in his or her eyes. The former Persecutor becomes the Victim and, lo and behold, the former Victim becomes the Rescuer. Why? Because they do not like your intervention, probably because they have more history together than they do with you, and for many other reasons. In any event, you are now hopelessly enmeshed. You have lost your position as the most reasonable and emotionally gifted person in the room. The game now goes on and on, and no one can predict where it will end. Your best move is to call the discussion out of order and ask them to resolve their differences outside, preferably with a member of management who has jurisdiction over the both of them.

Once, I was leading a study for a major restructuring of a certain country's operations. I had two representatives of a specialist staff function on my team—one officially assigned to it, and the other an advisor (we will call them John and Mary). At a departmental review of the restructuring plans, the vice-president of that staff function (let's call him Tom) said that he had heard two quite different recommendations from these two



individuals as to when the staff work would be completed. I knew that there were issues between the two, but I had not heard of this latest one. Tom said to me, “John and Mary told me two different things” with the unspoken implication, “What are you going to do about it?” I could have tried to resolve the problem then and there, but only at the cost of an unnecessary delay to the meeting. I would also run the risk of appearing to be on the side of one person or the other, especially since I did not have the benefit of knowing what John and Mary said to Tom. However, postponing my questioning, analysis, and decision to a later time would have taken the responsibility away from Tom, the vice-president to whom it rightly belonged. So I replied, “Well, Tom, they both work for you—so I guess it’s *your* problem.” And that was that. Shortly thereafter I received one recommendation from the team.

Even when meetings go well, others who are not directly involved may criticize the outcome and the decisions made. It is especially troublesome when these critics are at high levels in the organization. In this situation one still needs to remain steadfast and do the right thing.

Many years ago, I managed Exxon’s crude and product supply operations for a particular region. We always had choices to make among the various sources of raw materials and dispositions of a product. These decisions were reached according to what was best for the company in an overall economic sense, via consensus among all parties involved. Although what was good for one party or company division might not be good for another, people would tend to agree as long as the general interest was maximized.

Once, we had the opportunity to purchase a large cargo of crude from a third party in the last days of the year at a distressed price. Unfortunately, there was a downside: we could not lift a cargo of our own equity crude from upstream production until the first days of the following year. There were no negative upstream economics for the company, since that crude would be lifted after only a few days’ delay. However, it meant that our upstream division would not meet its quantitative stewardship target for that calendar year, but would correspondingly exceed it the following

year. I purchased the crude cargo, and the company made considerable bottom-line profit.

After New Year's Day had passed, I was called into the office of the upstream divisional vice-president whose past year stewardship I had impaired. He informed me that he was very disappointed. I explained to him that while his division's stewardship was indeed negatively impacted (if only to a minor extent), the overall economic benefit for the company was very positive. Besides, it was a one-time opportunity, and his people were kept informed along the way. He continued to say with greater emphasis that he was *very* disappointed. It was a frustrating meeting since I could not get him to understand that we worked in the company's general interest, and not just the interest of one division. The company CEO backed us up on that decision, and presumably our careers did not take a hit from that vice-president's disappointment. We could not have done anything differently. We had to make the right decision regardless of what others, even some very important people, thought. That example provides a perfect segue to our next topic: how to deal with disagreeable people.

**OCA METROPOLITAN COUNCIL/ STANDING SYNOD OF BISHOPS**  
**LEADERSHIP SELF-ASSESSMENT RESULTS**  
**September 19, 2016**

**Q1: How well do we understand the MC's mission, plans, goals and objectives?**

	1 strongly agree	2 agree	3 neither agree nor disagree	4 disagree	5 strongly disagree	6 don't know can't judge	AVERAGE
Our leadership team has a statement of its mission that is understood by all team members, i.e., “why are we here?”	14% 4	64% 18	7% 2	11% 3	0% 0	4% 1	2.1
The mission statement or other document serves as a “compass” for the leadership team that helps in setting future directions.	7% 2	71% 20	7% 2	11% 3	0% 0	4% 1	2.2
The leadership team has a plan that spells out specific goals and objectives for the next 3 to 5 years, i.e., “what are we going to do?”	11% 3	14% 4	29% 8	43% 12	4% 1	0% 0	<b>3.1</b>
The leadership team members understand the history of the leadership team (i.e., where we came from).	14% 4	46% 13	18% 5	11% 3	0% 0	11% 3	2.3
The leadership team members communicate their plans and progress to their constituencies (e.g., dioceses) and seek feedback.	4% 1	32% 9	29% 8	18% 5	0% 0	18% 5	2.7

Note: Respondents: Bishops 4, Clergy 12, Laity 11, Unidentified 1 = Total 28 out of possible 39

**Q2: How well do we know our individual leadership team responsibilities and how do we relate to one another as leaders?**

	1	2	3	4	5	6	AVERAGE
	strongly agree	agree	neither agree nor disagree	disagree	strongly disagree	don't know can't judge	
There are written statements of roles/responsibilities for the bishops and the other leadership team leaders and how they relate to one another.	11%	46%	11%	25%	0%	7%	2.5
The leadership team members understand clearly their individual roles and responsibilities.	7%	39%	14%	25%	0%	14%	2.7
I understand clearly my roles and responsibilities as a leadership team member.	25%	57%	7%	11%	0%	0%	2.0
Individual members know what the leadership team expects from them.	4%	37%	19%	22%	0%	19%	2.7
I know what the leadership team expects from me.	11%	54%	14%	21%	0%	0%	2.5
Individual members "know where they and the leadership team are going."	7%	11%	46%	29%	0%	7%	3.0
I know where the leadership team is going.	7%	29%	36%	25%	4%	0%	2.9
The MC members understand well the desires of the bishops.	0%	30%	22%	33%	4%	11%	3.1
I know what the bishops want from the MC.	4%	32%	25%	36%	0%	4%	3.0
The bishops understand well the desires of the MC members.	4%	21%	32%	32%	0%	11%	3.0
The leadership team members understand and support what the administration "does."	7%	36%	43%	7%	0%	7%	2.5

**Q3: How well do we, as the leadership team, work with one another?**

	1 strongly agree	2 agree	3 neither agree nor disagree	4 disagree	5 strongly disagree	6 don't know can't judge	AVERAGE
There is an atmosphere of mutual love, trust and support between the bishops, the administration, and the other leadership team members.	21% 6	61% 17	14% 4	0% 0	0% 0	4% 1	1.9
The leadership team members deal effectively with disagreements between themselves.	4% 1	64% 18	18% 5	11% 3	0% 0	4% 1	2.4
The leadership team members have frequent opportunities to get to better know one another and understand where each "is coming from."	11% 3	43% 12	21% 6	21% 6	0% 0	4% 1	2.6
Individual members respect one another and their opinions.	18% 5	71% 20	7% 2	4% 1	0% 0	0% 0	2.0
Individual problems or differences of opinion are addressed face-to-face rather than through third parties (e.g., "no gossip")	4% 1	44% 12	33% 9	7% 2	0% 0	11% 3	2.5
Individual efforts are rewarded with thanks.	7% 2	43% 12	32% 9	11% 3	0% 0	7% 2	2.5
Individual efforts are not "second-guessed" or criticized.	0% 0	18% 5	61% 17	14% 4	0% 0	7% 2	3.0
Individual members love one another as brothers and sisters in Christ.	32% 9	64% 18	4% 1	0% 0	0% 0	0% 0	1.7

<b>Q4: How do we, as the leadership team, work for the mission?</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>AVERAGE</b>
	<b>strongly agree</b>	<b>agree</b>	<b>neither agree nor disagree</b>	<b>disagree</b>	<b>strongly disagree</b>	<b>don't know can't judge</b>	
The leadership team members are energized and optimistic about the future.	7% 2	68% 19	18% 5	0% 0	0% 0	7% 2	2.1
The leadership team members have plans for self-improvement.	7% 2	33% 9	33% 9	7% 2	0% 0	19% 5	2.5
I have a self-development plan as a member of the leadership team.	4% 1	43% 12	21% 6	29% 8	0% 0	4% 1	2.8
Individual members understand what Christian leadership and service are.	7% 2	64% 18	11% 3	7% 2	0% 0	11% 3	2.2
Individual members take the initiative and seek responsibility for specific activities/ projects / jobs.	4% 1	64% 18	25% 7	4% 1	0% 0	4% 1	2.3
Individual members feel accountable for their individual responsibilities and follow through accordingly.	4% 1	71% 20	21% 6	0% 0	0% 0	4% 1	2.2
There are no problems in finding people to take up leadership positions.	4% 1	14% 4	36% 10	36% 10	7% 2	4% 1	3.3

*Some Handouts for  
Leadership in Practice: Goals, Vision, Prayer, Tenacity & Teamwork*

One of the Tenacity Slides:

**Tenacity: Be Creative in Overcoming Obstacles**



## Social Action

**FOCUS North America** [www.focusnorthamerica.org](http://www.focusnorthamerica.org) Since 2009, distributed over \$30 million in aid & youth services in dozens of U.S. cities, leveraging donations 7 times, 94% of funds directly helping those in need, serving over 500,000 each of meals & items of clothing, & thousands of job training/jobs, & shelter support.

**IOCC** [www.iocc.org](http://www.iocc.org) Since 1992, distributed over \$580 million in worldwide relief and development programs in 50 countries with 92% of funds directly helping those in need and leveraging donations seven times, serving millions of people.

**Project Mexico** [www.projectmexico.org](http://www.projectmexico.org) Since 1988, over 11,000 volunteers have built hundreds of home, 22 homes in 2016 alone, in Mexico and has a new Executive Director; St. Innocent's Orphanage (1996) currently has 22 boys in its program & 3 new ones on the 16 acre ranch, some previous students having graduated from college.

## Evangelism

**Becoming Truly Human** [www.becomingtrulyhuman.com](http://www.becomingtrulyhuman.com) Since 2014, a national pan-Orthodox evangelism program of the Antiochian Archdiocese, 30 churches participating in 2015, and a new, first of its kind in Orthodoxy, professional feature-length film, focused on the non-religiously affiliated ("nones") produced for 2016.

**OCMC** [www.ocmc.org](http://www.ocmc.org) 21 current missionary families in Albania, Guatemala, Kenya, Mongolia, New Zealand, Romania, and the United States. Had 7 short-term missionary teams (teaching, healthcare, and youth work) in 2016. Projects include aid to indigenous priests, philanthropic ministries, construction of churches, water wells & housing..

## Media

**Ancient Faith** [www.ancientfaith.com](http://www.ancientfaith.com), a national pan-Orthodox program of the Antiochian Archdiocese, effective evangelistic tool, divisions in radio, publishing & film, 126 podcasts, 164 specials, & free access to 28,000 episodes, averages between 150,000-175,000 download sessions monthly from 85,000-100,000 unique IP addresses.

**OCN** [www.myocn.net](http://www.myocn.net) Orthodox Christian News, Radio & Video Programming including on Orthodox Christian Life (The Anchor), Music (The Rudder), Orthodoxy Explained, OCN Now, and Our Life in Christ & in America. Written materials and articles include The Sounding. Video programming includes divine liturgies, sermons, and news reports.

## Education

**Faithtree** [www.faithtree.org](http://www.faithtree.org) Since 2015, a national parish-based ministry, growing rapidly in 1 year to a U.S. audience of thousands and in 13 countries, helping Orthodox Christians put their faith into action on a daily basis through a multitude of resources (small group studies, books, on-line events, webinars & workshops).

**Hellenic College/Holy Cross** [www.hchc.edu](http://www.hchc.edu) Established in 1937, 1905 current alumni, 91 full time undergraduates (54 males, 37 women) in 6 programs and 92 graduate students in 5 programs (80 men, 12 women) in , both accredited , with 9 faculty in the college and 12 in the seminary. 99% of students are Orthodox and 76% from the Greek Orthodox Archdiocese.

**St. Katherine's College**, [www.skcca.edu](http://www.skcca.edu), A nationally recognized Orthodox Christian accredited college of liberal arts and sciences, established in 2010 in North San Diego County, currently has 95 full-time students (60% male; 40% female) from 16 States and offers average class sizes of 12 students in 11 degree programs and NCCAA Div. 1 teams.

**St. Tikhon's** [www.stots.edu](http://www.stots.edu) Prepares students for ministry as bishops, priests, deacons, lay leaders, and scholars, ensuring that they receive, grasp, and pass on the apostolic tradition in order to pastor and build up the One, Holy, Catholic, Apostolic Church founded by Jesus Christ. Currently is sponsoring a parish leadership program.

**St. Vladimir's** [www.svots.edu](http://www.svots.edu). HAS 1,349 living alumni, among them: 30 hierarchs, 677 priests, and 58 deacons—as well as youth leaders, choir directors, professors of theology, and lay leaders—who minister in 19 Orthodox Christian churches worldwide.



### **Recent e-mail from a Priest:**

The context of my proposal is how to lead and inspire a community that has become complacent and content. How does the leader inspire others in the community to rise up and become leaders themselves. My community went through a turn-around situation, growing from 90-180 families from 2005-2011. The original community remembers the dysfunctional setting of the community before this renewal (going through 42 priests in its 85 year history), and seems happy and content with where the church is at. Since 2011, however, the church numbers have plateaued and strong lay leaders have not been cultivated.

The leadership issue I want to address is how to cultivate and develop new leaders who will take the church community forward with a new, creative vision. Despite the fact that so many people are too busy in our contemporary society, people will find time for something that gives them meaning and purpose. They will participate in a community of loving fellowship and nourishing support. What is the most effective style of transformative leadership to motivate people in this direction?

### **OCA Mission Statement**

The Mission of the Orthodox Church in America, the local autocephalous Orthodox Church, is to be faithful in fulfilling the commandment of Christ to "Go into all the world and make disciples of all Nations, baptizing them in the name of the Father, and of the Son and of the Holy Spirit, teaching them to observe all [things that He has] commanded" so that all people may be saved and come to the knowledge of the truth:

To preach, in accordance with God's will, the fullness of the gospel of the Kingdom to the peoples of North America and to invite them to become members of the Orthodox Church.

To utilize for her mission the various languages of the peoples of this continent.

To be the body of Christ in North America and to be faithful to the tradition of the Holy Orthodox Church.

To witness to the truth, and by God's grace and in the power of the Holy Spirit, to reveal Christ's way of sanctification and eternal salvation to all.

Adopted by the Holy Synod of Bishops of the Orthodox Church in America, 1990.

Orthodox Church in America  
Metropolitan Council/Standing Synod of Bishops

# Leadership in Practice

## Goals, Vision, Prayer, Tenacity & Teamwork

Charles R. Ajalat  
September 19, 2016  
Immaculate Conception Seminary  
Huntington, NY

All rights reserved 2016 – Charles R. Ajalat

# Goals, Calling & Formation of Leaders

- We should remember often, the Calling Isn't as Clear as it was to the Prophets that Pdn. Peter mentions.
- But if your focus is, as Pdn. Peter says, “God’s will be done” and if you believe that the end results are things pleasing to God, not your own desire, you should proceed and see if the effort is blessed.
- YOU can help create Leaders by giving people responsibility!
- Should We Develop a Core of Experienced Leadership Mentors?

# Goals & “Discovering the Will of God”

- Be careful of “signs” but be open to them as well.
- Often we may go down a path that is not the right one, but will be refined and hopefully end up in the right one.
- If the goal really is GOD’s will, you should not fail—if it is His will, it will work in some manner; if it does not work, its not from God & you don’t want to do it anyway.

# Goals/End Results

- In discovering God's will, define as carefully and as specifically as you can the goals or end results.
- Ask whether you believe those results are most pleasing to God.
- Ask whether you think those results can more effectively be "achieved" in some other way.

# Example of Goals: Advanced Leadership Institute

- Initial Desired End Results
  1. To strengthen the participant's faith.
  2. To strengthen the participant's leadership skills and the laity/clergy.
  3. To create or strengthen ministries (social action, evangelism, etc.)
  4. To develop networks, bonds, future Board members/donors..
  5. To develop a core of mentors for future leaders.
  6. To give additional visibility in society to the Church .
  7. Target Sr. Successful or Younger Church Leaders—separate/together?
- Is the Harvard Cost Worth the Value—or Can It Be Made to Be—Participant Donations?

# Goals & Content: Spiritual & Secular – Example: Adv. Leadership Institute

Suggested Content: Orthodox Leadership in Social Action

Day 1 & 2 Early Church Writers (Athanasius; Irenaeus), Church History & Governance, the Divine Liturgy, Death and Salvation, IOCC, FOCUS Projects (Add Evangelism, Faithtree, Seminary Educ., etc.?)

Day 2 & 3 (or 4) Advanced Leadership, Strategic Planning, Negotiation, Selecting a Board & Exec. Director, Fundraising,

# Qualities to Inculcate Vision & Prayer

- Vision—A leader sees the need and the solution and inspires the team toward a visionary goal, even if a stretch.
- E.g.s of Leadership Vision & to, as Pdn Peter Says, Actualize Them:
  - Cleveland Ranch: From “Can’t Do” to “Can Do More”
  - IOCC: \$50 million/year? \$100 million?
- Prayer—an essential part



# Vision & Prayer: A Leader Asks Why Not?

- When something that a person believes is pleasing to God, important, and should be done, but isn't being done, what should he or she do?
- Pray, take the leap, form a team, and be tenacious in trying to do it, until God leads you in another direction.

# Qualities to Inculcate: Tenacity in the Face of Difficulties

- SCOBA's Presidency & the "Good of the Church"
- A Jurisdictional IOCC or OCMC Versus the Church's IOCC or OCMC
- Family Support – "the third time is the charm"

# Tenacity: Be Creative in Overcoming Obstacles



# The Team

## Finding the People & the Resources

### Executive Directors

- Need for a full-time executive director for a program, perhaps cost-sharing in national/diocese/parishes.
- Economic Life of Executive Directors

# The Team:

## Finding the People & the Resources

### The Board of Directors & The Need for Initial Capital

The ideal situation is to find 5-10 people to start who will make a 3 year financial commitment of funds of \$5-10,000+/year.

One needs to build a visionary initial major donor base. It may take 25 asks to get 5 good board members, even nation-wide.

The broader capital—The ideal is to get a large number of people at \$50-\$250 per person to sustain the ministry.

# Are Your Mission & Practice Consistent?

- 2 Great Commandments & the Great Commission (“Salvation”; Our Neighbor)
- OCA’s Mission particularly Evangelism.
- The Metropolitan Council initiates the budget
- Is the budget consistent with the Mission?
- How to increase the budget?
- Are Economies of Scale Needed?

# Furthering the Mission: What If Any New Ministries Are Needed?

Some Ideas (Others where there is need?):

1. Adult Education: Seminary on-line Certificate?
2. Evangelism & Community (Becoming Truly Human)
3. Adult Education & Community Building (e.g. Faithtree)  
--Is your closest confidant in the Church?
4. Creation of & Association of Local Philanthropists
5. Association of MDs, attorneys, etc. on a Metropolitan or Diocesan basis

# Furthering the Mission: What If Any New Ministries Are Needed?

More ideas?

- Diocesan Pan-Orthodox Youth Dirs? Camps?
- National parish based ministries Cf. Faithtree.
- FOCUS feeding programs throughout diocese
- Local & regional Leadership Training Programs



# Conclusion

- God can call leaders through YOU!
- Develop Specific Goals, Vision, Prayer, Tenacity & Teamwork!
- Make Your Mission & Budget Be in Sync & Consider Economies of Scale & Fundraising!
- Ask What, if any, New & Existing Ministries Should the MC Lead In!