

**ORGANIZATIONAL CONSOLIDATION DYNAMICS:
A PROCESS FOR
ORTHODOX ADMINISTRATIVE UNITY IN NORTH AMERICA**

by

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**Submitted in partial fulfillment of the requirements of Master of Divinity
in St. Vladimir's Orthodox Theological Seminary,
Crestwood, N.Y.**

May 2006

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ABSTRACT

This thesis presents a new, fresh, and stimulating approach in support of the need for the present fourteen separate Orthodox jurisdictions in North America to consolidate into one administratively united Orthodox Church. It does so by first examining the reasons organizations of all types pursue consolidations and mergers with each other. It answers the question, why consolidate? Once the reasons for consolidation are understood the thesis proceeds to outline a very generic process of how consolidations are implemented.

The questions of how and why consolidation takes place are first discussed from a broad organizational viewpoint. Prior to engaging the questions, the very nature and definition of what constitutes appropriate use of the term “organization” is made clear to the reader. The term is shown to apply to many different types of social institutions. Organizations can be non-profit or profit entities. A clear difference is shown to exist between the terms “organization” and “business.”

Proceeding from this foundational understanding, it is shown that the Church, with limitations, can be considered to also possess all the basic elements of *organizations*. Having arrived at this conclusion, allows one to view the Orthodox Church in the contemporary North American cultural environment in a new light. The application of the same organizational dynamics that result in consolidation of all types of organizations is demonstrated to be applicable to the Church. This newly applied methodology is offered as another way of stimulating concrete action towards administrative unity of Orthodoxy in North America. It is not intended to negate or supplant the very other

powerful, canonical, ecclesiastical, and historical Church arguments calling for consolidation, but rather to compliment them.

The thesis is presented in four chapters, each chapter building its argument upon the proceeding one. Chapter 1 is introductory in nature to the general subject of organizations, mergers and consolidations. Chapter 2 focuses attention on answering the question why? A process for consolidation is outlined in Chapter 3, responding to the question how?

The last, Chapter 4, suggests and applies from the organizational dynamic principles in Chapters 2 and 3, models of how consolidation can proceed in a very systematic process incrementally towards the eventual full administrative unity of the Orthodox Church in North America.

This thesis is dedicated to:

Very Reverend Fr. Emanuel Z. Vasilakis

Very Reverend Fr. Thomas Hopko

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CHAPTER 1

INTRODUCTION TO ORGANIZATIONS, CONSOLIDATIONS AND MERGERS

Introduction:

The purpose of this thesis is to focus on a particular aspect of Orthodox administrative unity in North America. The term “administrative unity” is used here to depict an ecclesiastical organizational state where the present jurisdictional divisions of the Orthodox Churches in North America are replaced with one administratively consolidated Church body that is governed by a local North American Synod. The Synod would have no direct administrative ties to other self-governed Orthodox Churches worldwide. This thesis will focus specifically on the process of consolidation and merger. It will demonstrate that although the Church is a unique body in the world, established and led by Christ Himself, charged with a specific mission to the world; it too has a particular organizational structure and rules of governance as do all organizations. The Church viewed as an organization will be defended at the beginning of this thesis. If from a narrow and limited point of view the Church can be examined as an organization, then certain general dynamics, properties and principles of organizational life can be examined for their applicability to the consolidation of Orthodox jurisdictions in North America. This is true particularly as they apply to organizational consolidations and mergers.

It should be made clear to the reader that the thesis is not arguing that the Church is a business organization, which it is clearly not. A clear distinction should be made

between organizational principles and business principles. They are not the same. The foundation for this thesis is built on the application of organizational principles.

Because the Church is unique, the subject of consolidation, a movement towards unity through communion, can be expected to be embraced by the Church more readily than by other types of organizations. Bishop Kallistos of Diokleia describes this uniqueness of the Church as follows:¹

“If we reflect that the Church is a ‘eucharistic community’, founded and held in being by the act of communion in the Body and Blood of our Savior,...”

“We notice very clearly that power in the redeemed community of the Church comes from above, not from below. In modern democratic thinking, power comes from the people. But that is not the teaching of the Gospel. Power comes from God through Christ.”

“The Church is unique. Secular patterns of authority are utterly inapplicable. ‘All authority has been given to Me. I am with you always.’ The Risen Christ – ever-present in the Church through the Holy Spirit – is the one and only source of all authority within the Church. ‘Whoever shall be first among you, let him be your servant.’ Power means service. Think of Christ washing the feet of His Disciples.”

“Some years ago, the Orthodox Patriarch Ignatius of Antioch made a statement of great importance – simple but profound. He said: ‘Communion is the highest authority in the Church.’ I think that is exactly what Christ means when He calls us friends. We enjoy communion through Him with the Father, and through and in Him we enjoy communion with one another. It is communion which is the highest authority in the Church – the authority of mutual love.”

“The bishop is not a feudal overlord nor an elected parliamentary representative. The chief bishop, or ‘primate,’ is neither dictator nor a constitutional monarch nor the chairman of a board of directors. To interpret ecclesial authority by such analogies is to overlook the Church’s uniqueness as a Kingdom not of this world. It is to forget Christ’s severe and specific warning ‘not so among you.’”

¹ Bishop Kallistos of Diokleia, “*Not So Among You*” – *How Christian is Our Understanding of Church Authority*, Address to Orientale Lumen V at Catholic University, Washington, D.C., 2001, <http://www.ocl.org/church_governance

This thesis is presented as being in complete harmony with the aforementioned vision of the Church by Bishop Kallistos.

It should also be noted that this thesis will not deal with the general topic of Orthodox administrative unity from the perspective of presenting canonical arguments in support of its implementation. Nor will the thesis delve into the benefits that might emanate from such a consolidation in such areas as evangelization, witness and church growth. These ecclesiastical and spiritual aspects of administrative unity or consolidation have been explored by many in the Church. They will continue to be explored and discussed, but are outside the primary scope and focus of this thesis. It also must be stated at the outset that the author understands that the ecclesiastical and spiritual arguments for unity take precedence over the organizational principles suggested in this thesis. It is the author's contention though, that there will come a time when the activity of the Holy Spirit will say to the Church in America the time is ripe to unite. When that day comes, a process will be required to respond to the Holy Spirit. The principles put forth in this thesis are offered as a start to defining such a process.

It is the intent of this thesis to examine the practical organic process of organizational consolidation and where appropriate suggest its application to the Church. Organizations both in the public and private sectors have been and continue to be engaged in the processes of consolidation, merger, or change in structure.² In fact, other Christian denominations in North America can be shown to also have participated in such processes and continue to do so. It is through exploring the process of organizational consolidation and mergers that parallels can be revealed and application can be made to an eventual consolidation of the present fourteen separate canonical Orthodox Church

² NDMA Inc., *Mergers, Acquisitions and Consolidations*, <<http://www.ndma.com/resources/ndm1632.htm>

bodies in North America into one administratively united Orthodox Church. Much can be learned from examining the objectives and motivations leading to mergers of organizations.³ Consolidation of organizations is a very natural process, and so the view that issues associated with an Orthodox Church consolidation in North America are insurmountable may be unwarranted.

Division of church bodies based on ethnicity has occurred in most Christian Churches in North America including the Roman Catholic, the Lutheran and the Methodist Churches. The process of consolidation in these church bodies inevitably followed. On a continent that has seen great immigration, it is only natural that the Orthodox Churches in America follow a similar historical pattern.

Organizations

Before proceeding, it is important to address and understand the question: In what limited and specific sense the Church can be said to have attributes of an organization? To respond to such a question requires understanding of the definition of the term *organization*. In the broadest terms we can find Webster definitions of the noun “*organization*” and its related verb “*organize*” to mean the “state or manner of being organized; organic structure” or “an organism; any vitally or systematically organic whole, an association or society.” With these definitions given to the noun *organization*, we can understand the related definition given to the verb *organize* which reads as follows: “to arrange or constitute in interdependent parts, each having a special function

³ John A. Yankey, Barbara Webster, and David Campbell, *Skills for Effective Management of Nonprofit Organizations*, (National Association of Social Workers, Inc., Washington D.C., 1998), 492-503

or relation with respect to the whole.” Certainly in this broad sense we can find in the Church body compatibility with these definitions.

Consciously or unconsciously we have come to categorize or label organizations in a variety of different ways based on function, mission, purpose and legal forms. We apply qualifying terms to organizations: public or private, profit or non-profit. Organizations are subject to different federal, state, or local governing legal requirements. Using these definitions for organizations, the Church has a legal status in our civil society and has developed its own set of statutes by which it governs itself. Although the different Orthodox jurisdictions have their own internal and external administrative and governance statutes, and their defined relationships with other worldwide Orthodox Churches may differ, they all have in common the attributes of an organization. From this introductory basis one can therefore begin to understand the value of further identifying general principles or common elements that all organizations share. It also is clearly understood that the Orthodox Church theologically speaking is far more than just an organization. It is very appropriate to always keep in the forefront a more complete definition of what the Church is and what its mission in the world is in order that general attributes of organizations that are not applicable to the Church be identified as such. In addition to the vision previously quoted by Bishop Kallistos, Father Thomas Hopko says the following about the Church:⁴

“Church as a word means those called as a particular people to perform a particular task. The Christian Church is the assembly of God’s chosen people called to keep his word and to do his will and his work in the world and in the heavenly kingdom.

⁴ Thomas Hopko, *The Orthodox Faith, Volume i, doctrine*, (New York, The Department of Religious Education, The Orthodox Church in America, 1981), 123

In the Scriptures the Church is called the Body of Christ (Romans 12; 1Corinthians 10, 12; Colossians1) and the Bride of Christ (Ephesians 5; Revelation 21). It is likened as well to God's living Temple. (Ephesians 2; 1Peter 2) and is called 'the pillar and bulwark of Truth.' (1Timothy 3:15)"

Timothy Ware, now Bishop Kallistos of Diokleia, in his book *The Orthodox Church* provides an appropriate warning in speaking about the Church when he states:⁵

"The Church must be thought of primarily in sacramental terms. Its outward organization, however important, is secondary to its sacramental life."

It is with this reservation and understanding that this thesis is presented.

Returning to the Church as an organization, while maintaining the reservation presented, one can begin to outline the basic elements that all organizations hold in common. This will lead to an understanding of the dynamics of organizational behavior in society. Finally, holding in the forefront the special nature of the Church in the world, one can begin to discern from basic and universal principles, components and dynamics of organizations that are rightfully applicable to the operation and functioning of the Church in the world.

Mission and Purpose

A key attribute of an organization is its mission or the purpose for its existence. We often place organizations in specific categories, based on the organization's mission and purpose. Organizations may have identical, similar, or missions different from each other. Often organizations with identically stated missions are labeled as competitors in society. Just a few examples will demonstrate this. The auto companies in North America, such as Ford, General Motors and Chrysler, may be labeled as organizations whose stated mission is to sell their automotive products in the world marketplace. All

⁵ Timothy Ware, *The Orthodox Church*, (London, England, Penguin Books, 1997), 242

these organizations in executing their own and unique strategic plans to fulfill their missions, present their basic and common product, the automobile, as being superior in some manner to the same automobile product of their competitors. We find other types of organizations operating in other fields, offering products or services that have a common mission and purpose. Examples in the health care industry are hospitals and pharmaceutical manufacturers. They often communicate their missions to the public in competitive terms. Drugs are often advertised as being the most effective in addressing a particular symptom or malady. Hospitals often communicate their mission in terms of the quality of care, the superiority of their specialized medical equipment and yes, the experience of their medical staff or people. It is appropriate then to ask how does the Church communicate its mission to the world?

When we look at the Church as an organization we conclude that its common mission at its core is to proclaim the Gospel of Jesus Christ to the world (Matthew 28:19). Fr. Aris Metrakos of the Greek Orthodox Archdiocese of America in an article published in *OrthodoxyToday.com*⁶ expanded this understanding of Church mission by also adding the additional scriptural command to help “The least of our brethren.” However, unlike other organizations that fall into general categories or labels based on function or mission, the various denominations of the Christian community, broadly labeled as Church, may in fact have different visions, missions and purposes as organizations in the world. As such, there are literally thousands of churches that distinguish themselves from each other by proclaiming a different understanding of the Gospel of Jesus Christ or that direct their gospel message to particular groups of peoples. Compartmentalizing the different gospel messages of these organizations is often

⁶ Aris Metrakos, *The Next Triumph of Orthodoxy*, March 23, 2006, <<http://www.OrthodoxyToday.org>

difficult. In broad terms we often simplistically do this by citing Roman Catholicism, Protestantism, and Orthodoxy as three major Christian denominations or organizations with similar but different missions, messages, or purposes directed at the same or different audiences. This becomes further blurred when we delve into the major sub-divisions under the Protestant label, where in fact each sub-division distinguishes its mission and purpose from each other in a similar competitive manner that the automobile, hospital, and pharmaceutical companies do with their respective services or products.

Orthodoxy, as Church, particularly when sub-divided with ethnic labels, naturally places itself in the public's perception, as bodies operating within the general organizational category of Church, but with different missions, targeting different parts of the general population. In this regard a similar perception is applied to the Orthodox spectrum as is applied to the Protestant Christian spectrum in North America. One can understand therefore why the fourteen individual canonical Orthodox Churches present in North America, not counting the many other non-canonical Orthodox churches, are often seen as competitors from whom one has to discern a message, identify a constituency, before making a choice in seeking out a Christian Church. In a North American pluralistic society, the fact that the Orthodox Christian Gospel message and the foundational elements that comprise the Faith are identical is lost in a society accustomed to competing messages from organizations of all types.

Building Blocks of Organizations - People

It is now time to turn to a closer look at what are the building blocks or common elements of all organizations that are also applicable to the Church? First and foremost

one must identify people to be a common element of all organizations. People either define the purpose and mission of an organization and/or execute the mission defining the organization. People also are charged with communicating the mission and purpose of the organization within the society and culture that the organization functions. There can be no organization without people. The number of people necessary for an organization to function and the skills and knowledge of the people is dependent on the mission of the organization and the geographic reach and applicability of its defined message, service or product. Hence there are organizations of few people or many people. Depending on the mission and purpose, different skill sets can be required within the organization. Often as a function of size and mission, organizations will take on differing structures that further define the functions to be executed by people within the organization. These structures or relationships of people within an organization are designed to deliver the product or service of the organization in the most efficient and effective manner. This is often approached with the recognition that the recipient of the product or service must choose from among many competitive alternatives.

Following along these same broad and universal lines of portraying people as a common building block of all organizations is the attribute of leadership, headship, hierarchy and rank. These terms are used to identify the relationship and structure of the organization that allows its personnel to function and communicate with each other in order that the mission can be successfully executed. Organizational models and theories abound on the attributes of different types of structures.

One can test the universality of this principle of people as building blocks of organizations by testing its applicability to all types of organizations. Hence, in looking

at large commercial organizations such as General Motors, General Electric, Bank of America, or Federal Express Corporation, as examples, we find people in clearly defined organizational structures working to fulfill their particular missions. It also applies to large non-profit organizations or social care agencies such as United Way, or the American Cancer Society. It applies to philanthropic organizations such as the many public and private foundations that exist. Educational institutions small or large can also be viewed as organizations with missions that require people in order to function.

Finally, we can conclude that the Church also has the basic organizational need and element of people to enable it to function in the world. When we speak universally of the Church we think of it as one body, one organization, with its own particular reason and mission to the world. Sadly we all know that this one body, known as the Church in the world, is in fact many different bodies, or different organizations, with different understandings of themselves, and with different senses of purpose or mission to the world. It has also been shown that the major bodies of Christian churches can each be rightfully viewed as organizations with their own particular structural organization of people and hierarchy. This is also true of the Orthodox Church as it functions throughout the world. Narrowing the focus to the theme of this thesis, the fourteen Orthodox canonical bodies in North America all have organizational structures with people performing common elements of functions required by the Church. These Orthodox jurisdictions or organizations however exist with their own hierarchal, ecclesiastical and legal structures. Their relationships with each other and structurally with the other Orthodox Churches in the world differ.

People, as a primary element of all organizations will later be explored in the discussion of the process of organizational consolidation. People, as an element of the consolidation of the Orthodox Churches in North America, will be shown to be particularly important.

Building Blocks of Organizations – Facilities

Another major building block of all organizations is facilities. People, coming together as an organization are housed in buildings, offices, manufacturing plants, stores, etc. The term facility is used to connote the workplace of people. The same organization may have many different types of facilities, all necessary to execute its stated mission or purpose in and to society. Automobile and pharmaceutical companies would have offices where products are developed and designed. These organizations would also have facilities where their products are manufactured and tested. Finally they would have facilities where products are sold or distributed for their eventual consumption by the marketplace.

Churches, in an organizational sense also have facilities, to enable them to execute their unique mission in and to the world. As such, a basic facility element is the church building. In addition, other types of facilities are part of the church organization. Examples of these include seminaries or schools to train and educate clergy and laity, offices to house supporting staff personnel and its hierarchy, and monastery buildings for monastic communities. In North America, each of the Orthodox jurisdictions has their own facility building blocks of the types described.

Building Blocks of Organizations – Systems and Equipment

A final and third element of all organizations can be defined as systems and equipment. In this broad category one can place financial accounting systems, communications equipment and systems, technology systems/equipment, manufacturing equipment and tools, vehicles, office furnishings and any other such items utilized to communicate its message, deliver its product or service and fulfill its mission and purpose as an organization in society.

Clearly, the Church has all of these essential building blocks of systems and equipment for it to function in the world. More specifically, each of the separate Orthodox jurisdictions in North America has these systems and equipment as necessary components of their respective organizations.

Building Blocks of Organizations – Summary

All organizations as viewed from this described perspective therefore have the basic building blocks of people, facilities, and systems/equipment. These three elements, varying in proportions to each other for different kinds and sizes of organizations, are integrated in some fashion to enable the mission and purpose of the organizations to be expressed in society. The Church, although an organization with its own unique mission, has been shown to also have these same three basic elements, people, facilities, and systems/equipment. It is also clear that as individual jurisdictions in North America, each of the Orthodox Churches has these same three basic building blocks of all organizations.

Summary - Consolidations and Mergers

Having presented a systematized method of looking at organizations, including the Church, one can now proceed to define and understand the use of the terms consolidation and merger in the context of organizations. The technical words consolidation and merger can take on distinct or subtle meanings, but they can also be synonymous. In this context they mean a bringing together of two organizations. As we have previously shown, organizations have the three major elements of people, facilities and systems/equipment. Therefore when we speak of consolidation and merger of organizations, we rightfully imply the bringing together of each of the three major elements that exist in each of the individual organizations into one new organization with its own representation of people, facilities and systems and equipment. The process of the consolidation of two or more organizations encompasses the consolidation or integration of each of the individual elements of the respective organizations; i.e., people, facilities, systems/equipment.

The why and how of organizational consolidation will be addressed in Chapters 2 and 3. Here emphasis will be placed on discerning the answers to those questions. The answers will be used in developing a plan for the administrative and operational consolidation of the separate Orthodox Church jurisdictions in North America. The formation of an administratively united Orthodox Church in America must therefore provide for a systematic process of integrating all the three major building blocks of organizations: people, facilities and systems/equipment. The successful execution of a consolidation process will be greatly influenced by the recognition at the outset that this type of approach is both beneficial and necessary. Leaving aside the question of when

might this consolidation take place, when it takes place the consolidation will require a process to bring together, people, facilities and systems/equipment. This thesis proposes a process for this consolidation.

CHAPTER 2

INSTRUCTIVE LESSONS FROM WHY ORGANIZATIONS CONSOLIDATE

Introduction

Our attention in this chapter will be devoted to answering the primary question: Why do organizations consolidate/merge? Related issues include the obstacles to be overcome before, during and after the consolidation. As we have come to understand that organizations are differentiated in many ways by society both legally and functionally, it can be shown that both the reasons for consolidations and the processes followed in consolidation will vary greatly. This question will be applied to the consolidation of the separate Orthodox jurisdictions existing in North America.

First to be addressed will be a perspective that views all organizations as having three constituencies of people, each with their own respective organizational function. The second topic will focus more specifically on the reasons for consolidation. Reasons to be explored include both financial and marketplace identity. Closely related will be the question of how does the consolidated entity justify and fulfill the reasons for consolidation? Applicability of these topics to the Church will clearly be demonstrated.

Also instructive will be a relatively short summary of the experiences of other Christian denominations in North America who have consolidated.

Constituencies of Organizations

Now we return to the organizational element of people. To gain further insight to the consolidation/merger process it is helpful to view an organization as having three constituencies of people. These three constituencies serve different functions in relation to their roles in the organization.

The first constituency is the Board of Directors, also called Board of Trustees in some types of organizations. The Church parallel might be a governing Synod of Bishops, or a Council of clergy and laity, depending on the church's legal statutes. Boards or Councils serve as the legal entity of the organization responsible for administering the affairs of the organization in accordance with all applicable external laws. While there are functional elements and responsibilities of a Synod of Bishops acting in a church environment, the Synod can not and should not be considered to be completely synonymous with a Board or Council. Boards, Councils and Synods though all provide guidance and oversight for the operating leadership of the organization. The Board or Council provides periodic reviews of the mission performance of the organization against established criteria. Synods are not often thought of as performing this function, although it would be wise that they consider this one as of their responsibilities.

The second constituency of an organization is the stockholders or financial supporters and/or owners of the organization. The financial resources enabling the organization to carry out its mission come from this constituency. Other names applied to this constituency might be benefactors or donors, particularly in non-profit organizations. Again the primary function of this constituency is to provide the financial

resources for the functioning of the organization. In a church organizational environment this constituency might be considered to be the “membership” of the organization, both laity and clergy. Stockholders, benefactors, donors, or members generally provide financial support to organizations for a variety of reasons. These reasons might include the expectation that their financial investment in the organization will increase in value and accrue to them personally in some form. They also may believe strongly in the mission of the organization in the world and desire to assist in its communication and execution by providing financial support.

The third constituency of people in an organization is its employees. It is the employees who ultimately are accountable to the Board and charged with functionally implementing the mission of the organization. Employees are most often viewed as placed in an organizational structure that defines their relationship to each other and their function in executing the mission. Organizations may have levels that define leadership responsibilities by the use of different titles. Employees as a constituency may or may not be stockholders, benefactors, donors, or members of the organization. It has been generally shown that employees perform best when they understand and share in the mission of the organization.

Generally, initiation of a consolidation of organizations originates with the members of the Board or Council, or from the stockholders/membership of the organization. If emanating from the stockholders/membership, it ultimately is referred to and involves the Board/Council. Since a consolidation by definition involves at least two organizations, two Boards/Councils become involved, often necessitating the support and approval of the stockholders/membership of both respective organizations. Seldom do

employees of organizations initiate consolidation activity. Employees ultimately become involved, and in successful consolidations participate in planning for the integration of all the functional areas. In general, consolidations that are studied, conducted and executed with the cooperation of two organizations are deemed to be friendly. In some attempted consolidation cases of profit organizations, one of the two organizations resists the attempt at consolidation or merger by the other organization. These types of consolidation occurrences are deemed to be hostile. Rarely, if ever, are consolidations of non-profit organizations conducted in a hostile environment. In particular all successful church consolidations of different Christian denominations have occurred in a friendly fashion with the support and cooperation of all the constituencies of the consolidating entities. However minority factions within the Board/Council or memberships of each consolidating entity may sometimes be expected to show something less than full enthusiasm for certain aspects of the consolidation.

Application of these general principles to the church organizational environment would therefore lead one to conclude that consolidations ultimately must be deemed friendly, and initiated either by the governing Board/Council/Synod of each church, or by an overwhelming indication of support for consolidation coming from the membership of the respective organizations. Once exploration of a consolidation begins it is useful to include employees from both organizations to examine the integration of the key functional areas of the existing organizations. Study teams are formed to investigate and propose solutions to consolidation issues that will be faced in all three areas of people, facilities and systems/equipment. The financial implications of a consolidation are quantified and evaluated in this manner.

Understanding organizational constituencies will be useful in understanding why and how consolidations take place. Beginning with the example of a Board or Council initiating a consolidation, it can be shown that such an action may be motivated by one or more reasons.

The Financial Reason

The most commonly held belief is that consolidations take place primarily for financial reasons. Although this may be true, it is certainly not the only reason, as we shall discuss later and in the case of the Church it certainly is not a primary reason. When financial considerations are primary, an organization may want to raise its income, lower its expenses, or both simultaneously. It sees in the consolidation, the promise to achieve better results more quickly in cooperation with another organization than by working independently. Consolidations of these types generally take place with organizations that have similar missions, and provide similar services or products to similar consumers or supporters. In many cases two or more organizations can be viewed as competitors of each other.

From a purely financial viewpoint, let us examine each financial component that affects the performance of the organization. The first component is revenue or income. When two organizations are providing services or products in the same marketplace each of them is competing for a percentage of the total available income. This is often expressed as “taking a part of the pie,” achieving a percentage of the total marketplace expenditure, or simply “market share.” The consolidations of both organizations most often results in the consolidation of each organization’s revenue streams. The stated

mission of the new consolidated organization may also be perceived to be stronger than the individual mission statements prior to consolidation, thereby, increasing the revenue at a proportionately greater rate than the arithmetic sum of the individual organization's revenues. This increased incremental revenue is viewed as emanating from the synergy created by the consolidation. The two organizations may be deemed to have complimentary strengths that allow them together to perform better than individually.

Continuing with the financial performance aspect of consolidation, the other critical component is the cost of providing the services or products of the organization. An organization's expenses are generated from all three of the major elements of organizations: people, facilities, and systems/equipment.

Assuming that an organization has in place the most productive and effective personnel structure to execute its mission and is generally deemed to be "lean in headcount," there is a minimum employee count necessary to function properly in the marketplace without reducing the quality of its service or product. The consolidation of personnel from two such organizations into one organization most often is not arithmetic. This is particularly true in consolidating management, leadership and staff functions of organizations. Thus, the potential for great cost savings in personnel costs exist in consolidations. This is often a major driving motivation for consolidations.

The same potential for cost reductions can be said to exist in the second major building block of organizations - facilities. Often the facilities of organizations have excess capacity that can not be reduced because of geographic regional considerations.

Combining facilities often creates better utilization and space efficiencies. When personnel reductions occur because of consolidation, even more reductions in facilities becomes possible.

Finally, systems and equipment utilized by both organizations in such areas as telecommunications, computers and technology, financial accounting systems, office furnishings, etc., become sources of expense reductions by the utilization of one organization's systems to accommodate the total requirements of the consolidated organization. One such illustrative example is the accounting system utilized for such functions as the tracking revenue and costs and for the preparation of all management reports and documents.

Based on the foregoing overview of the impact of consolidations on the financial aspects of organizations, one can understand why it is very often a driver of organizational consolidation and merger. This general potential for financial performance improvement in organizations that consolidate is very much applicable to churches considering consolidation, although as previously stated it should never be considered a primary reason. However, while there are more important reasons to consider in church consolidation, the financial one cannot be excluded. The Church too functions with a revenue and cost structure enabling it to carry out its mission to the world. As we have already demonstrated, it too has all the building blocks of organizations. Therefore, the financial benefits of organizations undergoing consolidation can also apply to the Church as well.

A far more important reason for consolidation, particularly applicable to the Church concerns itself with the essence of communicating an organization's mission in

the marketplace. In the case of the Orthodox Church, it is communicating its understanding and free gift of the Gospel of Jesus Christ to everyone in the world.

Broaden and Sharpen the Organization's Message

Consolidations often serve as vehicle for broadening the appeal of the product or service by making the message to stand out from its competitors. The consolidation that results reduces the number of messages competing for support from the same group of potential stockholders or members. It is this principle that applies most directly to the Orthodox Church, particularly in North America. This should one of the most important motivations for an administratively united Orthodox Church in America.

An outcome of commercial organizational consolidation is the elimination of one of the competitors in the marketplace. Non-profit organizational consolidations often are motivated by the desire to pool organizational messages around common missions and not competitively divide the potential flow of support from a common membership base.

Returning to the thesis of the Church as an organization, it is clear that the Church in the 21st century is no longer seen as one united body proclaiming the same gospel message of Jesus Christ. We characterize the church's division into many bodies by using the term "denominations." In the Orthodox world in North America, Orthodoxy already mistakenly termed a denomination from a western church perspective, is further sub-divided by the term "jurisdiction." The use of this term, or the many prefixes that come along with it, such as Greek, Russian, Antiochian, Serbian, etc., is automatically perceived by the general population as churches defining and proclaiming different messages. In reality, among the commonly accepted canonical Orthodox Churches in

North America, the faith is one. The mission, message and understanding of the gospel of Jesus Christ are the same in all these bodies that carry different “jurisdiction” labels. Consolidation, will help eliminate the perception that there are many Orthodox denominations proclaiming different faiths. The artificial and misleading message of competitiveness is clearly removed in such a church consolidation. From this perspective the evangelizing mission of the Orthodox Church in North America would find a stronger voice to deliver its message with consolidation. This has been proven true in other Christian denominations in North America.

Marginalized Because of Size

This is another reason for organizations to consolidate. In a competitive environment it is possible to become marginalized because of small size. The term “marginalized” means that the percentage of the marketplace of an organization is very low, so low that its message is overshadowed by larger entities. In other words, “the organization is shrinking,” “the organization is spiraling downhill,” “the organization is losing its voice,” and finally the perception or reality that the organization does not have the ability alone to impact the marketplace with its service or product. It is overshadowed by larger organizations with greater resources of people, facilities and systems/equipment.

To counteract this reality, organizations come together to gain market size. The expectation is that in doing so, they will be large enough to have a voice and be heard among the competition.

The application of this principle of marginalization, can be applied to Orthodoxy in the American cultural context. Two religious surveys in America reveal the following statistics:

Based on a total population of 281 million¹ in America, 23.5% were non-Christian or about 66 million. Among the 76.5% of the population that is Christian the largest denominations in descending order were Catholic @ 24.5%, Baptist @ 16.3%, Methodist @ 6.8% and Lutheran @ 4.6%. Orthodox is listed at 1% of the population while Muslims, who are very much in the news today, were listed at less than .5% of the population. In reality because the Eastern Orthodox Church is further sub-divided into jurisdictions even the 1% ranking is further marginalized.² Even a consolidated Orthodox Church with only a 1% share of the religious landscape in America still faces a daunting challenge to find its voice and fulfill its apostolic mission.

It should be abundantly clear that the reasons given for organizational consolidation apply very directly to a “jurisdictionally” divided Orthodox Church in North America. While the ecclesiastical and canonical reasons for consolidation still take precedence, the organizational reasons provide further support for the benefits of consolidation.

The logical extension of a consolidation narrative is moving from the question “why?” to “how?” do organizations consolidate. In the following chapter this process will be explored in depth with specific focus on the applicability of the process to Orthodox Church consolidation in North America. Before doing so, a short summary of

¹ Ameristat Report, U.S. Population: *The Basics from US Census Data, August 2001*

² Barry A. Kosmin, et al., *American Religious Identification Survey 2001*, City University of New York

the historical road traveled by the Lutheran Church in America is also particularly revealing, illustrative and instructive for the Orthodox in America at this point in time.

A Lesson from the Lutheran Experience in America³

The Lutherans can trace their arrival and establishment of churches in North America to the mid-1700's. Lutheran church bodies were initially ethnic in character composed of German, Norwegian, Danish, Finish, Swedish, Slovak, Dutch, and other ethnicities. Beginning from these ethnic churches a long process of consolidation has taken place, not gaining full momentum until the late 20th century. The latest consolidation of Lutheran churches took place in May, 1987 with the formation of the Evangelical Lutheran Church in America. This largest of Lutheran churches of 5 million members came out of a consolidation of the 2.85 million member Lutheran Church in America, the 2.25 million member American Lutheran Church, and the 100,000 member Association of Evangelical Lutheran Churches. These latter two churches were themselves the result of the consolidation of eight smaller ethnically based Lutheran bodies.

The Lutheran North American experience is an example of incremental consolidation. The process has yet to be completed, as also existing is another major Lutheran Church body of 2.7 million members known as the Lutheran Church-Missouri Synod. In reviewing this Lutheran Church history one is struck by the very early attempts at cooperation initiated in 1917 by the various Lutheran bodies. Cooperation eventually led to consolidation, gaining momentum in the 1960's and 1970's. Approximately 45 years passed before cooperation turned to actual consolidation.

³ The material presented in this summary was obtained from
<<http://www.elca.org/questions/Results.asp?recid=1>

If one were to apply this historic experience to the Orthodox experience in North America, one would conclude that it is about time for consolidation to manifest itself by action. It has been about 46 years since SCOBA was established in 1960 as a cooperative Orthodox organization in North America. Like the Lutherans, it appears that the inevitable consolidation in Orthodoxy in North America has reason to begin.

CHAPTER 3

INSTRUCTIVE LESSONS FROM HOW ORGANIZATIONS CONSOLIDATE

How do Organizations Consolidate?

If one were to study a great variety of organizational consolidations, both in the profit and non-profit categories, basic steps of this consolidation process would emerge. In sequential order the consolidation process can include all or most of these basic steps, each subject to further refinement:

1. The Assessment Step

Successful and effective organizations are constantly assessing their performance. The benchmark for the organization's self-assessment is its mission statement. How well is the organization fulfilling its mission statement? To move from a subjective to an objective assessment requires the establishment and measurement of specific performance parameters by which the organization can be evaluated how successful it is in fulfilling its mission. Typical performance parameters might include measurements of growth, such as revenue, sales, or donations. Another assessment parameter is market share and market share growth expressed as the percentage the organization holds relative to its competitors. The financial state and health of an organization is assessed by a review of its income/expense statement and balance sheet. The income of the organization relative to its expense is a basic gauge of the financial operating health of the organization. Examination of both the sources of income and the nature of expenses

provides further insight to the financial health of the organization. Likewise, the balance sheet presents insight to both the nature of an organization's equities and liabilities complementing the financial assessment of the income/expense statement.

As part of the self assessment, the organization assesses their market position. They do this by quantifying their performance and like performance parameters of other organizations offering similar services or products in the marketplace. This perpetual assessment process often is the catalyst for consolidation. Assessment reveals negative trends for the organization, which include poor quantifiable self performance, lagging performance relative to other organizations in its market, and/or marginalization.

Often, a poor report card here encourages an organization to self correct its performance by a variety of action plans. When this avenue has been exhausted, the assessment step moves on to Step 2 of the consolidation process. The alternative to engaging in Step 2 is to cease operating as an organization. Organizations cease to be or can be said to die.

Some are quick to cite that this can never happen to the Church calling to mind Christ's words to Peter *"And I tell you, you are Peter, and on this rock I will build my church, and the powers of death shall not prevail against it."* (Matt. 16:18) Certainly this is true as applied to the greater Church as a whole in the world. It however, does not hold universally to all churches in all places of the world. This is very evident both scripturally and historically. One need only read Christ's warnings to the seven churches of Asia in Revelation to become aware of this. Closer to home one need look no farther than the parishes that have been forced to close around us or are barely surviving with the remnants of an aging population. Again in Matthew we read in what has come to be

know as the Great Commission, “*Go therefore 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 that I have commanded you; and lo, I am with you always, to the close of the age.*” (Matt:28:19,20) Archbishop Anastasios reminds us that the “I am with you always to the close of the age” is conditioned upon following an apostolic command. Conversely, it can be said that we have no assurance that He will be with us to the close of the age if we are not fulfilling his apostolic command. Therefore one can only conclude that indeed churches can die, have died and will continue to die, absent them not fulfilling their assigned mission in the world. The message is clear. All organizations, including the Church should constantly be assessing their performance and alert to negative trends, lest they face organizational death.

Application of this first step in the Orthodox Church environment requires an evaluation of performance. Ideally the individual jurisdictions should be assessing performance in similar ways using the same performance parameters. It would therefore be possible to arrive at a set of consolidated performance factors allowing the Orthodox Church in North America to assess and compare its performance as one religious body to the performance of other religious bodies in North America. Measurable factors should include the number of annual baptisms, chrismations, and deaths. Membership counts and the degree of financial support revealed in operating budgets, capital projects, and endowments all fall into this category. The assessment of Orthodox Church growth compared to other Christian denominations would be an important basic indicator of the Church’s evangelization performance.

2. The Evaluation of Options Step

From the measured performance parameters generated by the assessment process for other organizations with similar products or services in the market place, pro-forma models of possible merger options are prepared. These consolidation models are preliminary based on the degree of knowledge about the other organizations readily available. These preliminary models lead to confirmation by a more detailed examination that takes place in Step 3 of the process. These models of consolidation can vary in detail, but are often very broad. The objective is to discern where the greatest potential lies for consolidation. In addition to quantifying what the results of consolidation might be, subjective factors in a proposed consolidation are also evaluated such as cultural organization compatibility, market place perception, and any regulatory or legal factors that might affect the possibility of consolidation.

The potential barriers to consolidation models are often considered in this step with an accompanying assessment of what it would take to remove the barriers. Barriers might include individual Board or Council leaders known to be against consolidation.

Models are created that address all three of these basic elements: people, facilities, and systems/equipment. It is by first assessing what can be done with all three of these basic elements that a consolidated financial model can be prepared. This financial model is created by forecasting the consolidated expenses, coming from all three basic organizational elements, and the expected consolidated revenue. An ultimate objective of this step is the preparation of a projected income/expense statement and a balance sheet for the consolidation model being evaluated.

Orthodox Church administrative unity has been discussed for many years from an ecclesiastical or historic perspective. To the author's knowledge a consolidated model of what this united Orthodox Church might look like, its people, facilities and systems has not been presented. Neither has there been presented a consolidated financial picture of a united Orthodox Church. Unless some quantifiable models are prepared serious consideration of the consolidation of jurisdictions can not take place. The following chapter, in a very simplified manner, will present some models for incremental consolidation of jurisdictions leading to a fully united Orthodox Church in North America. Its purpose is to stimulate a more detailed study of quantifiable characteristics for such a church. Then relevant questions about how this would enhance the mission of the Orthodox Church in North America can be formulated and answered.

3. The Determination of Interest Step

Armed with preliminary analysis of consolidation models that justify a merger, the initiating organization communicates its interest in entering into discussion with another organization. This step is usually done with the full support of the Board of the initiating organization.

While the benefits of a potential merger have already been accepted by the initiating organization, the organization being approached may have to be persuaded that a merger also benefits them. This communication often takes place between the Chairman of the Board of each organization. More serious discussion will require support from the Boards of both organizations.

The process thus far has been limited to what previously was deemed to be a “friendly” merger. It is quite possible that the initiating organization may encounter resistance or a refusal to merge from the other organization. It is not the intent of this thesis to pursue how mergers proceed under circumstances deemed to be “hostile” other than to briefly mention several avenues that are often taken in such an event. They are presented because of their potential for application in the church environment that is the subject of this thesis.

If the initiating organization maintains a strong position in support of merger after being rebuffed by the Board or Council of a potential partner, it can state its case for merger in the public arena. In so doing its objective is to convince the other major constituency of the potential merger organization, the “stockholders” or the “membership,” that a merger is in the interests of the organization. This constituency of people within an organization was presented earlier as the one which provided the financial resources to enable an organization to operate and execute its mission. This path to merger, determined in the public area, certainly is not as preferable to a friendly merger in which the respective organizational governing constituencies agree to study jointly the benefits of merger.

This “unfriendly” merger approach may have application to the consolidation of Orthodox jurisdictions when some Synods of Bishops may not favor consolidation, or are externally constrained, even when the overwhelming evidence indicates great benefits. An appeal directly to the organization’s membership, both clergy and laity, may be required to change the minds of the resisting Synod of Bishops. This approach although

intended to bring about ultimate Orthodox unity, by its very action can be divisive and should be avoided if at all possible.

In the third step, under “friendly” conditions, both organizations would agree to a more extensive examination of the outcome of consolidation. The agreement to do so may be kept confidential or made public, both internally and externally in both organizations.

During this phase, both organizations appoint someone to lead the merger study and to coordinate the research activity by teams of representatives from each organization. These teams are assigned individual projects to examine options and quantify results from a merger. It is during this phase that the major elements of people, facilities and systems/equipment are reviewed with the view toward how best to integrate them in the merger.

All external and legal implications of merger are recognized and examined in this phase. The plans for each of the organizational elements form the basis for a joint consolidated vision and mission of the new organization, with an appropriate operating and financial plan. It is this plan that is presented to the Boards or Councils/Synods for review and approval, followed by its presentation to the stockholder or membership constituencies for their approval.

4. The Approval Step

Following the initial approval for a merger of two organizations by their respective Boards/Councils or Synods, and with the approval of the respective stockholder or membership constituencies, additional approvals are often required and

must be obtained. These other interested parties may include international, federal, state, and local authorities. In addition, approval or recognition might be required from other organizational agencies that exist for the purpose of coordinating activities and work of organizations with similar missions in society. As an example, in mergers of commercial business organizations in the United States the Department of Justice may perform a review to assess if the merger creates a monopoly that is not in the interest of the consumer.

As it would apply to the Church, jurisdictions have specific ecclesiastical relationships with other churches in the world. Gaining approval or ultimate recognition of a consolidated Orthodox Church in North America from the other Orthodox Churches in the world would undoubtedly be a major part of the approval process.

A word should be said about the approval process in general. It is crucial to gain support from both the stockholders and membership constituencies and from the other external organizations with interests in the merger. Communication is the key to success in this part of the process.¹

To gain approval and support requires the most articulate, skillful, and persuasive presentation of the justification for the consolidation to both organizations and their constituencies. A careful, thorough and preemptive consideration of all the questions that are likely to be raised by those from whom approval is required with appropriate responses is mandated. This part of the process requires a great deal of emphatic listening to what will likely be the position of those whose approval is required or support is being solicited. A clear understanding of all viewpoints of the merger must be

¹ Libby Trudell, *Thriving on Organizational Change: The Knowledge Sharing Advantage*, <<http://knowledgemanagement.itoolbox.com/pub/BH112502.pdf>>, pp 2,3

communicated to everyone involved so that no party feels that they have not been heard. The ultimate goal is a “win-win” position.² Resistance to consolidation from those who must approve is rarely overcome with argumentative force without acknowledging the views of the opposing party. This communication process is also referred to as the need to help others “find their voice.”³ In this process all parties grow into a new and productive relationship. These communication and negotiation principles would be of great benefit to the pursuit of unity in the Orthodox Church in North America. This is particularly true regarding communication with interested “mother” churches.

5. The Implementation Step

The success or failure of a consolidation will most likely hinge on the preparation and execution of an implementation plan. A well defined plan acts as the guideline for executing the merger. It must of necessity include all the elements that were worked out prior and during the merger process.

A general starting point for this activity is the reassembling of the teams that were formed in Step 3, The Determination of Interest Step. Often these initial teams are expanded to include other working members from both organizations to be consolidated. Additional teams or sub-groups may also be formed during this phase. As in the prior step, leadership for the implementation step is provided by the appointment of one leader from each of the consolidating organizations, or delegating the task to a single individual deemed to have the broadest grasp of the process and the vision and direction that the consolidated organization will pursue.

² Stephen R. Covey, *The 7 Habits of Highly Effective People*, (New York, Simon and Schuster, 1989) 204-234.

³ Stephen R. Covey, *The 8th Habit, From Effectiveness to Greatness*, (New York, Free Press, 2004) 97-99

First a leader for the new organization must be elected by the consolidated governing Board/Council/Synod. Also membership on the new merged Board/Council/Synod must be determined most often prior to or during the approval step. The new governing organization's Board/Council/Synod may include all or some of the prior organization's governing members. It may also include new members or members with new functional titles or positions.

In the church environment addressed in this thesis, the beginning of a new Synod would grow out of a consolidation of all the respective jurisdictional Synods currently in existence. A leader would be elected from these all inclusive Synods. It is from this new consolidated Synod that an implementation leader is appointed or elected to finalize and execute a consolidation plan. The implementation leader may be or may not be a member of the Synod.

After the initial justification for consolidation, more detailed plans are prepared. The most likely approach to this process again is to review the new organization's elements of people, facilities and systems/equipment. Starting with the people element, a structure for a new governing council, and a structure for the active leadership and management of the new organization is developed. Leadership positions are designated for the entire organization, generally with the approval of the governing entity. Progressing downward in the organization, taking into consideration geographical factors, a complete organizational structure is developed. The use of facilities from each of the consolidating organizations is also determined during the process. It is possible that some facilities will be deemed redundant, necessitating their sale or disposition. This activity becomes part of the master implementation plan. Likewise proceeding to the

area of systems and equipment, the appropriate teams will make decisions regarding how and what systems and equipment from each of the organizations will be combined, selected or disposed of. All this generally described activity is charted, forming the input to a coordinating financial team responsible for the preparation of a new financial plan for the merged organization.

In addition to the importance of identifying all of the tasks in as much detail as possible and assigning a person responsible for executing each task, sufficient time must be allocated for execution. Target dates should be established for the completion of all the tasks. From the target dates initially established, it becomes possible to determine a realistic operating implementation date. This date does not require the completion of all implementation tasks. The date is set for the completion of the mandatory items necessary for the new organization to function.

Management techniques for effective control of activities of this nature are readily available. Often consulting firms with expertise in this area of consolidation are hired to lead or complement the organizational teams. Without a comprehensive implementation plan, or setting a premature consolidation date, can cause the new organization to flounder. It will face a period of great confusion both internally, and most importantly externally, as it attempts to execute its mission in the world.

It is also appropriate to state that no plan can anticipate all the tasks and issues that will arise in a consolidation. There is a process for measuring implementation progress and providing necessary feedback of new issues as they arise. These will be properly dealt with and coordinated with all the other facets of the consolidation.

Other Interim Outcomes from the Evaluation Step

At times during the evaluation step, or sometimes during the assessment step, the process stops. Reasons may include external factors such as legal or international prohibitions against merger, or not being able to reach consensus on the time for consolidation, and an inability to find a suitable or willing consolidation partner.

Under the circumstances cited, instead of consolidating, or as an interim stage, organizations may join with other organizations in cooperative ventures or associations addressing common needs. Often organizations cooperate as a means of pooling resources to address common aspects of their individual operations. There are many such examples in the organizational world of this type of organizational cooperation.

Trade and industry organizations abound for these purposes, both in the profit and non-profit sectors.

One such illustrative example with the potential for being instructive to the Orthodox Church in North America is the international and domestic airline industry. Although now largely government deregulated domestically, and to some extent internationally, interference from international government regulators and interests has acted as a deterrent to merger. Foreign governments often have considered their airlines to be an extension of their international influence, and have provided financial support for their continuing operation. In some ways one might view the influence of “mother Orthodox churches” on their affiliated jurisdictions in North America to be similar.

Under these circumstances mergers were not possible. In these cases airlines have developed cooperative operating agreements. Such examples as sharing passenger ticketing systems, passenger facilities, and linking their respective schedules to make

them seamless to passengers traveling on their combined systems have been instituted. Attending financial benefits have accrued to the airlines engaged in these practices, as well as to the public served by them.

In recent years in America, the health care industry, especially hospitals, have seen the benefit of pooling resources. They rely on each other's specialized equipment and skills to provide the necessary specialized care for their patients, thus reducing the replication of systems and equipment. While it is also true that some of these cooperative arrangements have led to full mergers, others have found satisfaction in remaining as part of a cooperative association.

Instructive to the Orthodox Churches also is the process that preceded the consolidation of the many Lutheran denominations in America into two major bodies. This process is still evolving as there remain a significant number of small independent groups in the American Lutheran church. The merger process was preceded by cooperative study groups working together to address common religious ministries.

Finally, it is very appropriate to view this same approach operating since 1960 in the Orthodox ranks of Churches with the establishment of SCOBA in North America. This Standing Council of Canonical Orthodox Bishops in America is not a Synod in ecclesiastical function. It exists and operates rather as an Orthodox association of churches to cooperate in areas of ministry common to all its members. Much has been written and promised about the vision for SCOBA since its inception. To some, this organization was to be the predecessor to full administrative unity someday. Others might challenge this assumption. Nevertheless, an example of the cooperative aspect of the organization can be found in the many commonly staffed Orthodox ministries, cutting

across jurisdictional lines, operating under its auspices. Since SCOBA was established nearly fifty years ago, it is fair to state that the preparatory time for possible administrative unity has been extensive and of far longer duration than normal for most organizations.

It is the author's contention that cooperative ministries such as IOCC, OCMC, OCF and others are all beneficial, necessary and good. It would appear that the great success of these cooperative efforts has not been fully appreciated and replicated by expansion into other necessary ministries. As just one such example, domestic mission efforts in America remain largely independent efforts within each jurisdiction.

SCOBA moved closer towards administrative unity in 1994 when all the bishops within the respective member jurisdictions came together at a conference held in Ligonier, Pennsylvania. The presentations, deliberations and outcome of this conference are captured in two published documents titled: "Statement on Mission and Evangelism,"⁴ and "Statement on the Church in North America."⁵

Viewed from the perspective of this thesis, it is clear by reading both documents, that a process towards administrative unity is suggested by the Bishops via the route of continued and expanded cooperation prior to formulating a full consolidation plan.

Also, from the perspective of the principles put forward in this thesis, one can discern on the part of the Ligonier participants, a recognition that communication of the benefits of administrative unity must be made known to all the appropriate constituencies of their jurisdictions.

⁴ George Bedrin and Philip Tamoush, Editors, *A New Era Begins*, (Torrance, CA., Oakwood Publications for Orthodox People Together, 1996) 17

⁵ *Ibid.*, 21

Likewise, a failure is also apparent in the communication process used in approaching the other external bodies whose approval/support for such merger was sought. Rather than suggest and employ a “win-win” negotiating position, direct confrontation and a challenge to some of the mother churches’ positions concerning the Church in North America were put forward. This challenge took the form of claiming the use of the term “diaspora” by the mother churches as being theologically incorrect and not applicable to North America.⁶ While this may in fact be the case, as history would illustrate over ten years later, the confrontational approach was a failure.

Barriers to Mergers Summarized

Thus far in the course of outlining how organizations consolidate, we have spoken of some of the obstacles that are encountered. These include the issue of conflicting goals of the separate constituencies of people. A Board or Council may not support a consolidation although this position may be contrary to the interest of the organization’s stockholders or membership. We have also discussed how external factors, including legal and governmental regulations may prohibit consolidation.

Two other factors should be discussed because they touch both the organizational and spiritual dimensions of human relationships. These two factors are complacency and power. Both emanate from a fallen human characteristic sometimes associated with those who lead or are a part of the governing Board/Council/Synod of the organization.

Complacency is that trait that finds interest in maintaining the status quo. It is the human trait that is most always resistant to change. This often occurs even in the course of encountering difficulties. It is unwillingness to recognize negative trends or to avoid

⁶ Ibid., 22

them entirely by not attempting to quantify them. It is a failure to recognize the way things really are. It is delusional at its very core and is often associated with the element of fear.

The factor of power emanates from a fallen human condition in which one or more individuals refuse to give up control of other human beings, even when such control is to the detriment of the many.

These two factors may inhibit administrative North American Orthodox Church unity. Because this may be the case, and may be given tacit recognition as such by some, it can be the source of discouragement for those seeking church unity and it can be the justification for inactivity.

Two courses of action that have been previously mentioned can also be applied in both these instances: an appeal to the stockholder or membership constituency of the organization and the search for negotiating a “win-win” outcome for the resistant individual or entity.

Summary

Having outlined the reasons and methodology for organizational consolidation, Chapter 4 will apply these enumerated principles to the Orthodox Churches in North America in preparation for administrative unity. The application of these principles outlined in Chapter 2 to the Church have been suggested in the course of describing the consolidation process. In this chapter it was also stated that there is an absence of vision for an administratively united Orthodox Church. To this end, Chapter 4 will suggest possible snapshots of such a church, both fully united (all canonical Churches

participating) and partially united. When more than two organizations are brought together, the process faces more complexity in working out solutions for how best to bring people, facilities and systems/equipment together into one new organization. A pragmatic solution to this situation is to approach consolidation on an incremental basis; i.e., two organizations are first consolidated and then others are gradually brought into the new consolidated organization until the process is completed in total. The multiple Orthodox jurisdictions may lend themselves to such a process. This was previously shown to be the path that the Lutheran Church followed in North America. A variation of this process is to merge all the jurisdictions at the Synodal level, while applying an incremental consolidating process to other functioning staff and ministerial operations of the church. Additional discussion of the application of general organizational principles to these scenarios will be presented in the following chapter.

CHAPTER 4

SUGGESTED MODELS FOR AN ADMINISTRATIVELY UNITED ORTHODOX CHURCH IN NORTH AMERICA

Vision and Mission

In the first chapter we spoke about organizational behavior being driven by a sense of mission and purpose. We went on to distinguish the Church as having its own unique mission in the world. In addition to the theological definitions quoted from Fr. Thomas Hopko's and Bishop Kallistos Ware's writings, attention was called to the rather straight forward scriptural based mission statement offered by Fr. Aris Metrakos. He summarized the Church's reason for existence in the world, and North America in particular, to be carry out the Great Commission and help "The least of our brethren." Without prayerful reflection on what the mission of the Church in North America is, it becomes impossible to formulate models for a future consolidated and a united Orthodox Church. All models should have as their intent the desire to execute and fulfill the clearly stated vision and mission of the Church in a particular time and place. As it applies in this thesis, the time is now and the place is North America.

The Whys of Consolidation

The second chapter of this thesis explored the reasons that organizations embark upon the route of consolidation. It was shown that many of the reasons for consolidation apply to the current Orthodox Church situation in North America. Some of the reasons

cited can be considered primary and some secondary in importance. Their relevance to the Orthodox Church in North America at this time can only be discerned from how they impact the vision and mission of the Church, hence the importance of vision and mission.

It is the author's contention that from among the reasons cited for consolidation, the most important is to develop a common voice and witness to the Gospel of Jesus Christ as handed down from generation to generation in the Orthodox Church. What has been given to us is not to remain hidden and masked but rather to be proclaimed to everyone in our society as called for in the Great Commission. (Matt. 28:19, 20)

“Go therefore 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 that I have commanded you; and lo, I am with you always, to the close of the age.”

It has been argued in Chapter 2 that the Orthodox voice is currently marginalized in our pluralistic North America cultural society and is not effectively heard in our present jurisdictional configurations. What are needed are one voice and one Orthodox Church. This chapter will suggest some possible models of consolidation as the process is begun in our Orthodox Church. From these models the advantages of consolidation towards fulfilling the mission of the Church and its destiny on the North America continent will be discussed.

The How's of Consolidation

Chapter 3 outlined a process leading towards consolidation of organizations. Its appropriateness to the Orthodox Church in North America was also suggested and defended. The five step process, beginning with the assessment step and completed with the implementation step, was also shown to be applicable to the present Orthodox Church

environment in North America. It can serve as a road map leading to administrative unity. Critical to the process and necessary as a motivational force is an honest quantifiable assessment of how well the Church is performing its stated mission in North America. Once again, central to a good and thorough assessment is having a vision of what could be possible if the Orthodox Church in North America was administratively united. It is the objective of this chapter to suggest outcomes from some possible united Orthodox Church model options. Since it was clearly shown that the complete process of consolidation makes use of teams of people from the components involved in a consolidation, it is not possible to completely explore the full advantages of consolidation in this short thesis. In an Orthodox Church consolidation in North America, the expertise and knowledge of the functioning of the church would come from representatives from all jurisdictions spanning the many facets of church life. Teams working together, all sharing and holding a common vision, would undoubtedly produce a much more complete picture of life in an administratively united Orthodox Church in North America. Therefore, the purpose of this chapter is to only stimulate such a future effort as part of a consolidation process, worked at methodically and systematically by all the constituents of such a future united Orthodox Church.

A Return to Basics - People, Facilities and Systems/Equipment

In the first chapter it was useful to think of an organization as being comprised of three major building blocks: people, facilities and systems/equipment. It was shown that from this perspective the Church too could be spoken of as an organization. This perspective became particularly useful in understanding the issues of consolidation that

must be addressed when two or more organizations decide to unite. Each of the individual building blocks in a consolidation process can be studied independently and then brought together as a representation of what form the consolidated organization could take. It was suggested that this same process could be used to simulate a consolidated Orthodox Church in North America. Our attention now will be to apply this process to such a consolidation of the Orthodox Church.

Before proceeding with the process, it has also been suggested that when the ultimate goal is the consolidation of multiple organizations, as will be the case in the Orthodox Church, it pragmatically can be useful to apply an incremental consolidation process. This is particularly useful to do since it is commonly known that each of the present independent Orthodox jurisdictions have their own perspective on the need and timing for consolidation. Each of the jurisdictions faces their own set of issues internally and externally, particularly in terms of their relationship with “mother” churches. And finally, communication between all the jurisdictions varies in accordance with the closeness of their present relationships. Therefore what will be presented are two models.

The first is an incremental step towards consolidation by looking at what might emanate from a consolidation of the Orthodox Church in America, hereafter referred to as OCA, with the Antiochian Orthodox Archdiocese of America, hereafter referred to as AOAA. Hereafter this will be referred to as the OCA/AOAA Consolidation.

The second model will examine what becomes possible when the Greek Orthodox Archdiocese of America, hereafter referred to as GOA, along with the other canonical Orthodox Churches in America join to complete the consolidation and form one united

Orthodox Church in North America. Hereafter this will be referred to as the GOA/OCA/AOAA Consolidation or simply as the United Orthodox Church, UOC. No significance should be attributed to the name contractions or to their order of listing. It is useful only as a vehicle to describe the elements involved in a suggested two step consolidation.

OCA/AOAA Consolidation – People

We have spoken previously of the usefulness of looking at the subject of people within the Church by looking at three constituencies: the Synod of Bishops, the highest authority within the Church, the membership of the Church, its clergy and laity, and the employees of the Church, responsible for its daily administration.

In most all the major Orthodox jurisdictions in North America, there are two other bodies of people that have leadership and legal responsibilities for the administration of the Church. Serving as adjuncts to the Synod of Bishops is the Metropolitan Council (in the OCA) and the Archdiocesan Board of Trustees (in the AOAA). The statutes of these two jurisdictions define the legal and administrative functions of these bodies. In addition both the OCA and the AOCC define their largest “legislative body” as being the All-American Council and the General Assembly respectively.

A consolidation of the OCA and AOAA would necessitate formulating and accepting a new set of governing statutes for the administration of the Church that would define the roles of similar supportive administrative bodies working in communion with the Synod of Bishops. Within the new statutes, one would also find sections that addressed the relationships of the general membership and employees of the Church with

each other and with the Synod of Bishops. From a visionary perspective what might the people dimension of the consolidated Church look like?

OCA/AOAA Consolidation – People – Synod of Bishops

The consolidation would bring together thirteen bishops from the OCA¹ and seven bishops from the AOAA,² for a total of twenty hierarchs to lead and guide the consolidated Church. This new Synod would oversee approximately 1200 clergy (priests and deacons)³ and a lay membership of approximately 200,000 people.⁴ From these consolidated numbers one can envision ratios of approximately 60 clergy per one bishop and approximately 167 lay members per one clergy member. These approximate initial ratios are reasonable from a practical pastoral viewpoint. This general overview is probably over simplified.

Much attention must be given to Synodal issues to be faced by the new consolidated Church. How should the present ethnic dioceses within the OCA be addressed? Should ethnic dioceses be a part of the consolidated Church? The opportunity to realign the geographic boundaries of dioceses so that they represent a more even distribution of parishes, clergy and people under the guidance of one bishop exists in the consolidation. Certainly the opportunity to align the dioceses canonically, so that there is only one bishop in one place is possible. The present assignments of bishops

¹ <<http://www.oca.org/HSIndes.asp?SID=7>

² <http://antiochian.org/Archdiocese/History/archdio_struc.htm

³ The OCA Syosset office provided information that stated currently there are 682 priests and 182 deacons serving in the OCA. The AOAA website states that priests and deacons total “nearly 400.”

⁴ Obtaining accurate counts for memberships in the Orthodox jurisdictions, as in all other religious denominations is difficult since everyone tends to overstate their numbers and define the term “member” differently from each other. For this thesis therefore, all statistical data for membership and number of parishes for each jurisdiction was obtained from the Hartford Institute for Religious Study, *Research on Orthodox Religious Groups in the United States*, by Alexi D. Krindatch, Table 1b, year 2000
<http://hartsem.edu/research/research_orthodoxsummary.html

within both jurisdictions present very little, if any, conflict. What remains to be worked out is a distribution of geographic territory that most closely aligns itself with the present distribution of the Orthodox population today. Also to be considered, especially from an evangelistic vision of carrying out the Great Commission, is a geographic alignment in accordance with the greatest growth potential. Done thoughtfully, it becomes exciting to contemplate the possibilities for advancing the mission of the Church through consolidation.

Focusing attention on the Synod of Bishops brings one quickly to the issue of who will be the Primate of the consolidated Church and how might he be selected? Once again this issue is one commonly faced by Boards of organizations that consolidate, and as such should not be deemed to be an obstacle to consolidation. The leader most likely will come from the initial twenty bishops who comprise the consolidated Synod. The leader can either be elected via majority vote, or selected from two candidates, each one coming from the present OCA and AOAA Synods, by a drawing of straws, letting the Holy Spirit determine the first Primate of the consolidated Church. It is recognized that at present each of the jurisdictions has a Primate and these two are counted among the twenty bishops. Normally this situation can be difficult to resolve in the course of a consolidation. However, under the present circumstances both of the existing Primates are known to be elderly and each is faced with health issues. This opens the door to other possibilities from among the other eighteen bishops.

We should now return to the material presented in the third chapter of this thesis that outlines the process. The preference for a “friendly” consolidation initiated and supported by the Synods of both churches is most desirable, and would be most likely to

lead to a successful consolidation. It was also pointed out that eventually the stockholders, or membership in the case of churches, would have to support and approve a consolidation.

There is ample evidence that all the supporting elements spoken of are indeed present and in place for a consolidation of these two Orthodox jurisdictions based on the actions and written record of all the constituencies involved. First there is a long standing public record of support for such a consolidation from both of the present Primates of the Churches. Both Metropolitan Herman of the OCA and Metropolitan Philip of the AOAA have repeatedly called for and expressed their support for a consolidation, not only of their respective jurisdictions, but also for all Orthodox jurisdictions. Most all of the Synodal members from both churches are also on record in support of a consolidation of their two jurisdictions. And finally, the largest constituency from both jurisdictions at their respective All-American Council and General Assembly during the summer of 2005 *enthusiastically* called for and reacted favorably towards a consolidation. From this perspective one can only state that all of the constituencies have made their support known to their respective Synods. From a consolidation and merger viewpoint, this is a most favorable environment for consolidation. What remains to be done is the nitty-gritty of following through with the rest of the outlined steps to a consolidation. It is time for teams to be formed with members from both jurisdictions to pursue and propose initial solutions to the issues raised by a consolidation. Bishop Basil, a member of the AOAA Synod proposed such an action publicly by a video presentation made to the delegates of the OCA All-America Conference gathered in Toronto in the summer of

2005. A formal endorsement by his Synod and a corresponding acceptance by the OCA Synod would initiate such a consolidation effort.

Continuing with the people aspect of a consolidation, there are approximately 22 departments and organizations within the OCA structure and 24 similar departments and organizations within the AOAA structure, each charged with administering and performing the necessary ministries of the church.⁵ The constituency of employees within both jurisdictions and the functional services that they provide will be just one of the areas that will require team study. As previously discussed, the potential for a more effective and united ministry exists from proposals for innovative consolidations in these areas. Also, as previously noted opportunities will be found for more effective use of the financial resources of the Church in these areas.

Providing just one such example of consolidation in these ministries can demonstrate the greater effectiveness in fulfilling the Great Commission of the Church. Each jurisdiction at present has its own functioning department of evangelization and mission. Although, there is evidence of cooperative effort towards this end, the consolidation promises a much more coordinated and systematic response to this primary mission of the Church. It is very exciting to contemplate the future potential fruit of this consolidated ministry of the Church. It is such a vision that should motivate the formal consolidation effort of these two jurisdictions.

OCA/AOAA Consolidation – Facilities

In keeping with the approach of viewing consolidations through the prism of three basic elements of organizations, it is now appropriate to present a vision of what might be

⁵ Data taken from their respective websites www.oca.org and www.antiochian.org.

possible in the area of facilities. First, it should be known that a consolidation will bring together a total of approximately 740 parishes distributed throughout North America from which the Faith can be proclaimed and lived.⁶ The consolidation of the OCA and AOAA will produce the single largest number of parishes under the leadership of an Orthodox Synod of Bishops. This can be a major first step towards responding to and correcting the issue of “marginalization,” as a more effective voice of Orthodoxy in North America.

An outgrowth from a more detailed review of the geographic distribution of parishes might reveal opportunities for the consolidation of some parishes located in very close proximity to each other in some locations. Such issues should be studied and evaluated on an individual basis, taking into the account the history of each parish, its present needs and what might be deemed best to enhance the primary mission of the Church to spread the Gospel to all peoples.

Another major facility consideration in a consolidation of jurisdictions previously mentioned is seminaries. At present this does not appear to be an issue since the AOAA sends its students to the seminaries of the OCA and GOA. For future consideration the present three seminaries of the OCA might be the subject of a later study to determine the suitability of their present geographical locations for the consolidated Church. Consideration of a western location might be appropriate at some future date.

A third facility consideration arising from a consolidation of the OCA and AOAA is the subject of the present headquarters of each location. A study should be conducted regarding the possibility of consolidating the related national church headquarters and staff functions in one of the present facilities or perhaps in a new and different facility.

⁶ Hartford Study, *Ibid.*, Table 1b

Related to this study will be the alternative use for one or both of the present facilities and/or their disposition. Also related to the headquarter question in a consolidation will be the staff locations of the consolidated ministries of the Church. They can be centralized or decentralized geographically. This too, is an issue to be studied.

As each of these facility issues are initially resolved by the systematic team study process, the accompanying financial implication of their resolution will be determined and will become a part of the consolidated operating budget for the consolidated Church. Of course, as part of the team approach to the consolidation, a financial team of individuals knowledgeable with the individual finances of the present OCA and AOAA will be an important component of consolidation effort. This financial team should also include individuals from both churches who are experienced financial officers of organizations and perhaps have participated in organizational consolidations or turnaround situations. History points towards the probability of expense reductions accruing from such a process in the course of a consolidation. Should this occur it should be considered to be a secondary, although welcomed benefit of consolidation.

OCA/AOAA Consolidation – Systems/Equipment

The third and final major element in an organizational consolidation has been previously labeled as systems and equipment. Both the OCA and the AOAA have technology departments to oversee their respective telecommunications and computer systems. Also, under this heading falls the accounting systems utilized to track income and expenses. Data systems for maintaining and tracking operating and historical information on all aspects of the church's work and ministries fall under this broad

category for both jurisdictions, and must be reviewed by appropriate study teams to determine their potential for use in a consolidated Church. Most systems utilized for the above functions by one of the organizations can accommodate the combined requirements of the consolidated organization. This type of review and study is quite normal, and again has the potential for yielding expense reductions when completed.

In conjunction with the facility team study previously mentioned will be an assessment of the equipment utilized for daily office operational functions. Again, depending on the outcome of the facility decisions, disposition of excess equipment may be a final outcome of the equipment review. Professional services contracted by both the OCA and AOAA for such items as legal and accounting functions as examples may result also in the elimination of duplicated activities providing further expense reductions.

In summary, this third area of systems and equipment must be systematically reviewed by a team formed out of representatives of both jurisdictions familiar with this aspect of church activity. The outcome and recommendations from this review will form a basis for planning the expenses associated with these activities in the consolidated Church.

OCA/AOAA Consolidation – Other Considerations

Before summarizing a vision for the potential outcome of this incremental consolidation of Orthodox jurisdictions, it is appropriate and important to address the subject of communication during the planning and decision making phase of the consolidation.

One potential challenge to the proposed consolidation may come from other parts of the Orthodox Church world in general, and particularly from the Synod of the Church in Antioch. It has only been in most recent times that the AOAA has achieved the status of “self-ruled” under the guidance of the mother church in Antioch. The Church in Antioch undoubtedly will view the consolidation between the OCA and AOAA as something that will have a lasting affect upon its own position as an autocephalous Church in the world Orthodox community. We have previously spoken of the need to anticipate, recognize and address these types of issues in a consolidation in order that a “win-win” solution may be the final product of the consolidation. How this issue of relationship with a mother church is approached and formulated will undoubtedly be closely monitored by the other mother churches in the Orthodox world, especially the Churches of Constantinople and of Russia.

Simply recognizing this as a fact, is most important to find a solution that will be acceptable to all affected parties. One small, yet important consideration, might be the written assurance that the consolidated jurisdictions as a united Church, agree to recognize the historical support afforded them by their respective mother churches over their history in America by establishing in their consolidated operating budget line items of financial support to both the Churches in Antioch and Russia. This may at the very least alleviate any fears that the consolidation will have a negative financial affect on the Church in Antioch. It also has the potential to serve as a precedent for future incremental consolidations of additional jurisdictions into a united Orthodox Church in North America. Beyond the expression of financial support, consideration should be given to providing assurances of continued North American political support for issues that affect

the well being in the countries that are considered “mother churches.” Some may take issue with this type of activity by a united Orthodox Church in North America. However, to do so may in fact convey the reality that a strong united and vibrant Orthodox Church in North America can and will provide more support to all the mother Orthodox Churches than each of the ethnic jurisdictions can provide individually to their respective mother churches.

OCA/AOAA Consolidation – A Visionary Summary

The suggested incremental consolidation of the OCA and AOAA in North America has every potential to become the model and mechanism by which the majority of the separate Orthodox jurisdictions, join together as the One, Holy Catholic and Apostolic Church in North America. In touching upon issues that relate directly to the primary mission of the Church, the following things bear repeating:

- the voice of the Orthodox Faith will be strengthened by its consolidated size.
- the bishops of the Church will move closer to their clergy by more reasonable and manageable ratios of bishops to clergy.
- the bishops will move closer to their flocks by a more reasonable and manageable ratio of bishops to people.
- a united Orthodox presence will be manifested in over 700 geographically distributed communities throughout North America.
- the closer relationships of bishops to clergy and bishops to people has the potential for greater communication and understanding by all the constituencies of the Church.

- financial support for the mission of the Church should increase based on the improvement in communication and the redirection of the united Church to its primary mission in North America.
- operating expenses for the mission of the Church should be reduced placing the Church on a firmer financial footing for expanding its missionary efforts in North America and throughout the world.

Completing the Incremental Consolidation – The UOC in North America

The second model and goal for an administratively united Orthodox Church in North America is the completion of the consolidation process begun with the first incremental consolidation of the OCA and the AOAA. This will occur with the addition of the remaining canonical Orthodox jurisdictions in North America. Again, to gain a sense of vision of what such a completed consolidation would accomplish in the North American religious landscape the following data is presented:

- The Synod of Bishops would increase in size to 36.
- The number of clergy in the consolidated Church would be approximately 2500.
- The membership of the Church would be approximately 753,000.
- The number of parishes would be slightly over 1500.
- The clergy to bishop ratio would be 69. To bring the ratio down to that of the incremental consolidation of the OCA and AOAA, which was 60, would require the election of approximately 6 additional bishops bringing the Synod of Bishops up to a count of 42.

It is appropriate to mention at this point that nothing in the consolidation of parishes neither in the OCA and the AOAA initial model nor with the completed consolidation model by the addition of parishes from the GOA and other jurisdictions necessitates the adoption of a common liturgical language or common liturgical rubrics. It is envisioned that the two great liturgical Orthodox traditions, the Byzantine and the Russian will be continued to be utilized by the parishes having their roots in these respective liturgical traditions. Some parishes will chose to use both traditions.

Although still relatively small in the Christian religious landscape in North America, this model of a united Orthodox Church in North America would serve as a very viable platform from which the Church could accelerate its missionary efforts among the peoples of the continent. As previously stated in Chapter 2, the task of having its voice heard in the religious marketplace would still be formidable. However, it would strengthen the voice and message to a much greater degree than is presently possible.

The consolidation of the Greek Archdiocese of America within the previously consolidated OCA and AOAA, along with the remaining Orthodox jurisdictions, would of necessity replicate the process outlined in this thesis and previously applied to the first incremental consolidation. Adequate time would elapse, to measure the performance of the incrementally consolidated Church formed by the OCA and AOAA, and to make any necessary revisions to the adopted statues of the Church, in preparation for the complete consolidation.

Beginning with the Synod, a further geographical realignment of dioceses can be envisioned to accommodate the additional parishes entering the consolidated Church. Canonical order would be maintained in the realignment of diocesan boundaries. The

accompanying issues of integration of the other functioning departments of the new entering jurisdictions, and their related staff personnel would be addressed in a similar fashion as the first consolidation. Teams would be assembled to study and recommend solutions to the issues raised by the expanded consolidation.

The second element of facilities would be handled in a likewise manner as would be the final integration of the systems and equipment from the remaining jurisdictions. With the addition of just the GOA, facility considerations would include the integration or disposition of their headquarters offices in New York. A great opportunity would be presented to a united Orthodox Church with the addition of the GOA Holy Cross Seminary and Hellenic College in Boston. This campus, or one of the other seminary campuses, could in fact be devoted to a much expanded Orthodox College or University over time. A united Orthodox Church would encompass a larger potential student and teacher population from which to grow, strengthen the curriculum and attract students compared to the present limited ethnically defined college.

Closing Summary

It should be clear, even in this preliminary presentation of a vision, that the Orthodox Church should consider proceeding with consolidating into one administratively united Orthodox Church in North America. Once again the process brought forth in this thesis is considered to be an encouragement to further support the theological, canonical and ecclesiastical justifications for consolidation. Hopefully it will be viewed in this visionary light and provide sufficient stimulation for the process to begin. One reader summarized this thesis by saying, *“The time is now, and here is how!”*

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