



49th Diocesan Assembly

July 20-24, 2026

St. Augustine/Vilano Beach, Florida

Diocese of the South 49th Assembly 2026

His Eminence Alexander
Archbishop of Dallas and the South

Bishop Gerasim
Bishop of Fort Worth

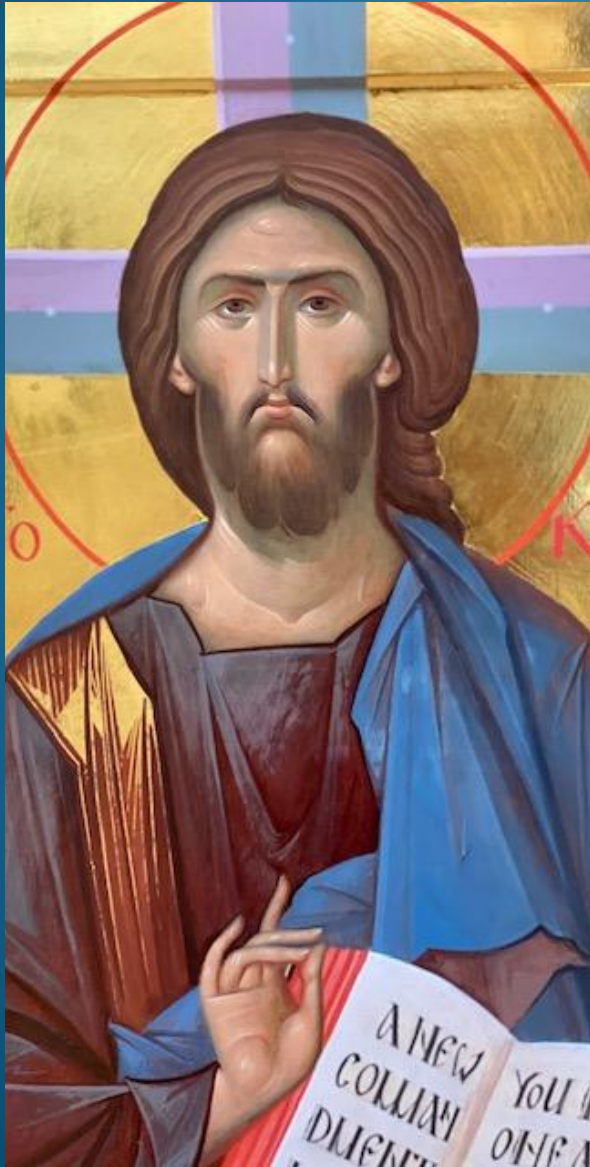
Archpriest Marcus C. Burch, *Chancellor*

Fr. Peter Robichau, *Secretary*

Fr. Jason Foster, *Director of Development*

Ms. Mary Harkins, *Treasurer*

Opening Prayer, Welcome, and Call to Order



O Heavenly King,
the Comforter, the Spirit of Truth,
Who art everywhere and fillest all things
Treasury of blessings
and Giver of Life;
come and abide in us,
and cleanse us from every impurity,
and save our souls, O Good One.

Agenda

Tuesday, July 21, 2026 (2 - 4 pm)

1. Opening Prayer, Welcome, and Call to Order
2. Appointment of Assembly Officers and Secretariat
3. Minutes of 2025 DOS Assembly
4. Archbishop's Address: His Eminence, Alexander
5. Administrator's/Chancellor's Report:
Bishop Gerasim and Archpriest Marcus Burch
6. Director of Development and Treasurer's Report:
 - a. 2025 Financial Report and 2026 Financial Update
 - b. 2027 DOS Budget

Appointment of Assembly Officers and Secretariat

Archbishop Alexander
President

Bishop Gerasim
Vice-President

Fr. Marcus Burch and Rdr. Gregory Dale
Clergy and Lay Vice-Chairs

Fr. Jonathan Reavis and Audrey Beach
Secretariat

Credentials/Tellers

Fr. Sergio Lopez, Fr. Seraphim Crossman, Lance Kaminer

Minutes of the 2025 DOS Assembly

(distributed via email/web)

Archbishop's Address

His Eminence, Archbishop Alexander



Administrator's/Chancellor's Report

Bishop Gerasim and Archpriest Marcus Burch



Diocese of the South 2026 Development & Treasurer's Report

49th Diocesan Assembly
St. Augustine, FL
July 21, 2026



*“Unless the Lord builds the house, those who build it
labor in vain.”*

Psalm 127:1

CURRENT OPERATIONS

As of June 30, 2026 vs. June 30, 2025

OPERATING INCOME 2026
2025

Tithes	\$1,080,225	\$ 1,065,930
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Donations & Investments Income		\$ 2,644
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TOTALS	+1.59%	\$1,082,869	\$1,065,930
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CURRENT OPERATIONS

As of June 30, 2026 vs. June 30, 2025

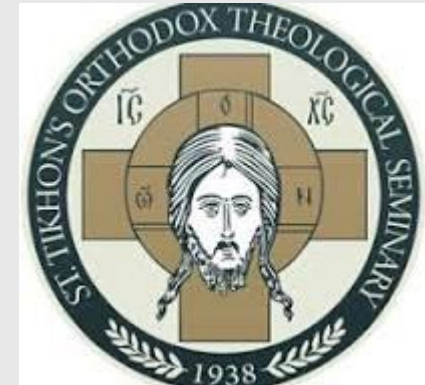
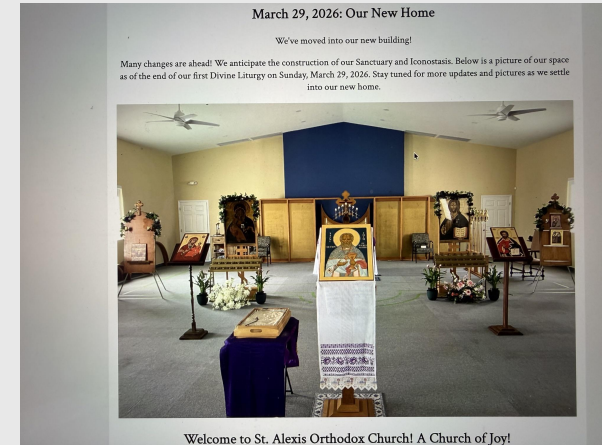
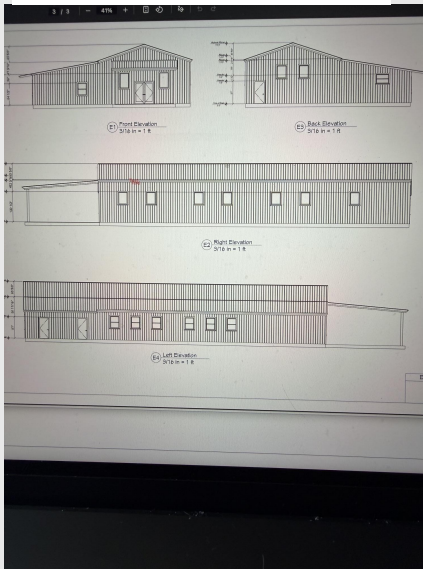
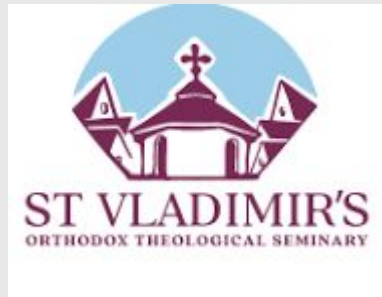
OPERATING EXPENSES 2026 2025

Administration	\$262,519	\$324,290
Parish/Missions Support	98,388	65,452
DOS Sponsored Activities	-	2,200
Legal Fees	140,340	366,281
OCA Assessment	289,607	309,786
Interest Expense	149,835	142,796
Tithe Credits/Grants	-	-
TOTAL EXPENSE	\$965,089	\$1,210,805
NET INCOME 181.3%	\$117,780	-\$144,875

2027 BUDGET & FORECAST

	2027 BUDGET	2026 BUDGET
INCOME	\$1,778,615	\$1,679,354
EXPENSE		
Personnel	\$478,619	\$409,082
Travel	63,200	52,500
Buildings & Grounds	80,000	107,000
Office & Administration	30,600	28,650
Meetings & Conferences	81,500	68,500
Sponsored Activities	8,000	5,500
Missions & Parish Support	175,000	175,000
OCA Assessment	502,729	474,273
Interest Expense	300,000	299,500
Charitable Contrib.		-
TOTALS	\$1,729,648	\$1,620,005
NET INCOME	\$ 48,967	\$ 59,349

DEVELOPMENT



Top 1-Year CD Rate Before and After the Fed's Rate Hikes

In a fight against post-pandemic inflation, the Federal Reserve raised its benchmark interest rate 11 times from 2022 to 2023—pushing CD rates up along with it.



Shown above is the top nationally available rate on the last business day of each month.
Chart: Investopedia | Sabrina Kati | Source: Investopedia daily CD rate data

Investopedia

Investment in Missions

The Diocese's investment in mission development since 2021 has produced measurable results:

13 new mission communities have been established

8 priests have been assigned to serve those communities

These missions have contributed **\$148,348.18** in diocesan income.

These figures demonstrate both the spiritual and financial growth of the Diocese.

Mission Growth

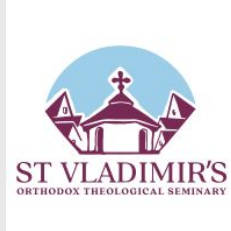
2021-2026

Deanery	New Missions	Priest Assigned	Income Received
Appalachian	2	1	\$6,034.12
Carolina	1		
Mississippi River	3	2	\$34,578.02
North Florida	2	2	\$64,327.44
SouthCentral	3	1	\$22,802.91
SouthEastern	2	2	\$20,605.69
TOTAL	13	8	\$148,348.18

Cash Reserve Optimization

Implement a laddered CD strategy to generate interest income from excess cash reserves while maintaining adequate liquidity for operational needs.

Projected annual income: approximately \$20,000 from \$600,000 invested in interest-bearing financial instruments.



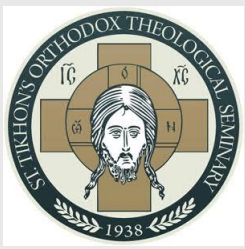
Seminary Support Program

Saint Vladimir's Seminary offers institutional financial aid, including need-based tuition grants and scholarships. Seminarians are expected to apply annually for all available seminary aid and external grants before diocesan assistance is applied.

The recommended funding model is:

- Approximately 50% funded through Saint Vladimir's Seminary grants and financial aid.
- Approximately 25% funded through grants and scholarships.
- Approximately 25% funded by the Diocese of the South.

Based on current tuition levels, the Diocese of the South would provide up to \$4,000 per academic year toward tuition expenses.



Seminary Support Program

Saint Tikhon's Seminary students will also be eligible to receive up to \$4,000 per academic year from the Diocese of the South.

Seminarians are expected to pursue all available scholarships, grants, and financial aid opportunities offered by Saint Tikhon's Seminary. Any remaining educational expenses may be financed through federal educational loans or other approved educational lending programs.

Because Saint Tikhon's Seminary is generally a three-year program, a seminarian would be eligible to receive up to \$12,000 in diocesan tuition assistance during enrollment.

Tuition and Post-Graduation Educational Loan Assistance

For a seminarian attending St. Tikhon's or St. Valdimir's three-year MDIV program:

- **Annual Diocese Assistance: \$4,000 per academic year - \$12,000 total.**
- **Maximum Loan Repayment Assistance Following Graduation: \$28,000**
- **Maximum Total Diocese Commitment: \$40,000**

Diocesan Development Programs

Grants

- DOS mission planting grant (up to \$36,000)
- Building transitioning grants, i.e., Construction, purchase
- LILLY Foundation Grant

Manage debt program/ Tithe credit

Parish and mission support

Onboarding new priest



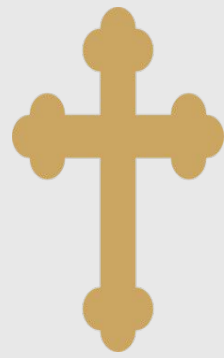
Partnership with OCCIF

A ministry that provides financing for orthodox churches to purchase, build, renovate, and improve church properties while also offering investment opportunities that support the growth of the Church

To date, OCCIF has assisted the Diocese with multiple parishes mortgages including

- St George Memphis TN
- St Catherine Columbus MS

The Diocese has also invested \$100K with OCCIF, helping provide capital that makes these mortgages possible



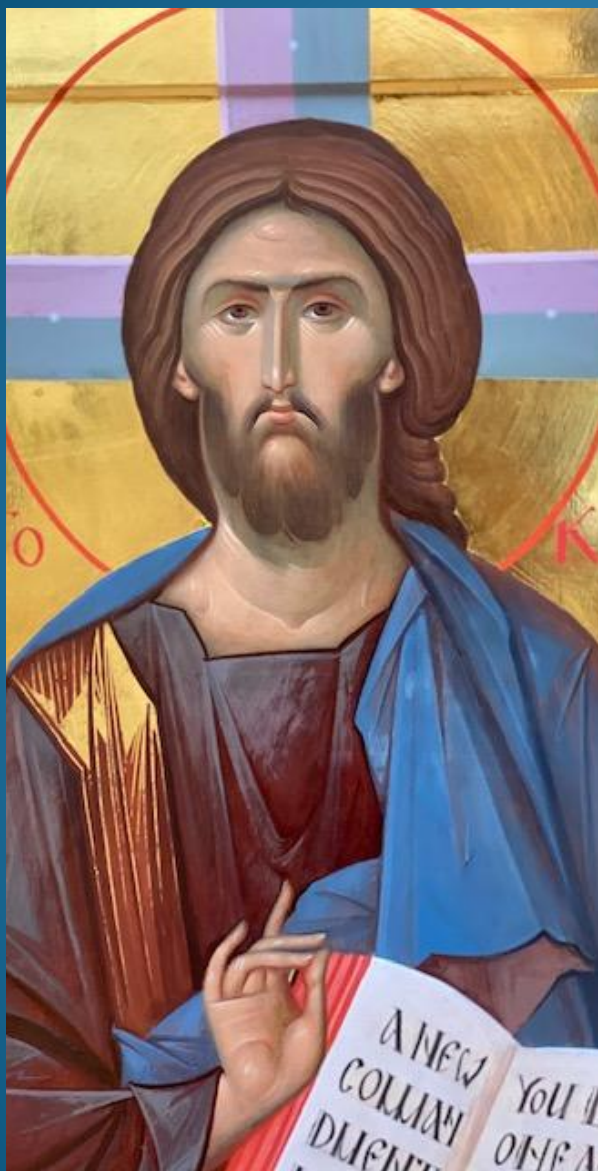
*“Therefore, my beloved brethren,
be steadfast, immovable,
always abounding in the work of
the Lord,
knowing that in the Lord
your labor is not in vain.”*

1 Corinthians 15:58

“Unless the Lord
builds the house,
those who build it
labor in vain”



Ps. 127



Closing Prayer

It is truly meet to bless you,
O Theotokos,
ever blessed and most pure
and the Mother of our God,
more honorable than the Cherubim,
and more glorious beyond
compare than the Seraphim,
without corruption you gave
birth to God the Word,
true Theotokos we magnify you.