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# METROPOLITAN COUNCIL of the ORTHODOX CHURCH IN AMERICA

REPORTS  
2022 Spring Session



Wednesday, February 9 – Thursday, February 10, 2022  
Conducted by video conference

## TABLE OF CONTENTS

### Wednesday, February 9, 2022

1. Agenda
2. Metropolitan's Report & Remarks
3. Chancellor's Report Archpriest Alexander Rentel
4. Property Committee Ray Steeb  
Gregory Honshul
5. Secretary's Report Priest Alessandro Margheritino
6. Archives Relocation Kitty Vitko  
Gregory Honshul

### Thursday, February 10, 2022

7. Treasurer's Report Andrew Smith
8. Audit Report Audit Committee
9. Council Manager Deacon Peter Ilchuk
10. Departments Archpriest Thomas Soroka
11. Office of Pastoral Life Archpriest Nicholas Solak
12. Communication Priest Kyle Parrott
13. Pension Plan Pension Board
14. Metropolitan Council List

**SCHEDULE and AGENDA ITEMS**  
**REGULAR SPRING 2022 SESSION OF THE METROPOLITAN COUNCIL**  
**February 9-10, 2022**

The Metropolitan Council of the Orthodox Church in America will meet under the presidency of His Beatitude Metropolitan Tikhon on Wednesday, February 9, 2022, and Thursday, February 10, 2022, at 1:00pm EST, for its Regular Spring 2022 Session. These sessions will be held via teleconference due to the continued public health crisis. If needed, further sessions will be called for later this Spring.

In the course of our meeting, alongside our regular business on Wednesday, February 9, 2022, the Metropolitan Council will hear a presentation by Mr. Gregory Honshul and Mr. Ray Steeb, co-chairs of the Property Committee of the Metropolitan Council, on the relocation of the Chancery of the Orthodox Church in America to Washington, DC, beginning in July 2022 and completed by Spring 2023. They will then propose a resolution to amend the 2022 budget accordingly in order to accomplish this move. During his report, Priest Alessandro Margheritino, Secretary of the Orthodox Church in America, will discuss the status of the relocation of the archives of the Orthodox Church in America. When he is finished, Mr. Gregory Honshul and Popadija Kitty Vitko will present a report on their recent visit to St. Vladimir's Seminary and offer a resolution regarding the relocation of the Archives.

On Thursday, February 10, 2022, Mr. Andrew Smith will present his report to the Metropolitan Council on the current financials, investment performance, and the external auditors' report. He will also make an amended 2022 budget. After his report, Ms. Maha Adranly, a member of the Internal Auditing Committee, will be on hand to answer any questions the members of the Metropolitan Council might have regarding the internal audit. According to the Statute (Article V, Section 9), the chair of the Auditing Committee, Ms. Polly Walker, should attend the meeting of the Metropolitan Council when this report is presented. Ms. Walker is unable to attend, and has asked Ms. Adranly to attend in her place.

After the report of the Internal Auditing Committee, Mr. Andrew Smith will update the Metropolitan Council on the review of the Pension Plan by Cheiron, which the Metropolitan Council undertook in November 2021. Please note that members of the Metropolitan Council should anticipate a further meeting later this spring to receive and discuss the results of Cheiron's review.

After these presentations, the Metropolitan Council will hear reports from a) Archpriest Thomas Soroka, Project Manager for the Departments of the Orthodox Church in America; b)

Archpriest Nicolas Solak, Program Director, Thriving in Ministry; and, c) Protodeacon Jacob Frimenko, on the results of a survey sponsored by the Clergy Synaxis group.

At the end of our meeting on Thursday, His Beatitude will make a determination whether to adjourn the regular session of the Metropolitan Council, or call for further meetings as needed.

**Wednesday, February 9, 2022, 1:00-4:00 pm EST**

1. Opening Prayer
2. Call to Order – Archpriest Alexander Rentel
3. Review of Agenda – Archpriest Alexander Rentel
4. Roll Call– Archpriest Alexander Rentel
5. Approval of the Minutes of the Regular and Special Fall 2021 Sessions of the Metropolitan Council
6. Report of the Metropolitan – His Beatitude Metropolitan Tikhon
7. Report of the Chancellor – Archpriest Alexander Rentel
8. Property Committee – Ray Steeb and Gregory Honshul
9. Report of the Secretary – Priest Alessandro Margheritino
10. Archives Report & Resolution – Gregory Honshul and Kitty Vitko
11. 20<sup>th</sup> All-American Council – Deacon Peter Ilchuk
12. Concluding Remarks – His Beatitude
13. Prayer – His Beatitude

**Thursday, February 10, 2022, 1:00-4:00 pm EST**

1. Opening Prayer
2. Call to Order – Archpriest Alexander Rentel
3. Review of Agenda – Archpriest Alexander Rentel
4. Roll Call– Archpriest Alexander Rentel
5. Report of the Treasurer (presentation of a. financials, b. investments, c. amended 2022 Budget, d. External audit) – Mr. Andrew Smith
6. Internal Audit – Ms. Maha Adranly
7. Pension Subcommittee – Mr. Andrew Smith
8. Departments Update – Archpriest Thomas Soroka
9. TiM & Clergy Synaxis – Archpriest Nicholas Solak
10. Synaxis Program Survey – Deacon Jacob Frimenko
11. Concluding Remarks – His Beatitude
12. Prayer – His Beatitude

# Metropolitan Council Meeting

Spring 2022

February 9–10, 2022

## Report of the Metropolitan

### **Session One (Wednesday)**

1. *Welcome.* I welcome all of you to the Spring Meeting of the Metropolitan Council. We have a number of important matters to discuss, so I will try to limit my introductory remarks here.
2. *New Members.* We especially warmly welcome our new Metropolitan Council representatives from the Diocese of Eastern Pennsylvania, Fr. Nicholas Solak and Danilisa Radu, who are replacing Fr. Timothy Hojnicky and Sharon Shingara, whose terms have concluded. With gratitude to Fr. Tim and Sharon, we look forward to the contributions of Fr. Nicholas and Danilisa. We also welcome, as representative from the Diocese of Western Pennsylvania, Fr. John Parker, who was elected last Fall but is joining us for his first meeting this week. Fr. John, Fr. Nicholas, and Danilisa, we look forward to your contributions to this body.
3. *Our Cleveland Gathering.* Our last meeting in October was held in conjunction with a special gathering of the leadership of the Orthodox Church in America, including the Holy Synod, the Diocesan Chancellors, the leadership of all three of our seminaries, and superiors from several of our monastic communities. Even though COVID concerns forced the shortening of our gathering and the postponement of the Holy Synod meeting, I am pleased that we were able to accomplish what we hoped to accomplish at this joint meeting. Follow-up work has begun on the results of that meeting, and various entities will continue to carry on the work by trying to implement concrete solutions that were proposed or digging deeper into some of the areas of needed work. This is a Church-wide endeavor

which I hope will bear fruit, not only at the All-American Council in July, but beyond. I am grateful especially to Fr. Alessandro for his oversight of this process.

4. *October Events.* In the final weeks of October, following our gathering in Cleveland, I participated in the Annual Assembly for the Diocese of New England, in my role as locum tenens. I continue to have regular meetings with the Chancellor, Fr. John Kreta, and with Igumen Nikodhim Preston, the Chancellor of the Albanian Archdiocese, for which I also serve as locum tenens. The episcopal search process is underway in both dioceses, though at different speeds.
5. *November Events.* In November, I attended a concert of music by Arvo Pärt, co-conducted by Benedict Sheehan at the Metropolitan Museum of Art; met briefly with His All-Holiness Patriarch Bartholomew at his hotel during his recent visit to the United States; and then participated in the “Opening of the Doors” ceremony at St. Nicholas Shrine at the 9/11 memorial. A planned visit of Fr. Alexander Rentel to the Phanar was postponed due to his bout with COVID, although he did present a paper virtually to the conference in which he was invited to participate. Later in November, I served with Metropolitan Hilarion of Volokolamsk at St. Tikhon’s Monastery, after he offered the keynote lecture at the Scripture Conference organized by St. Vladimir’s Seminary. His Eminence was very moved with his first visit to St. Tikhon’s Monastery, and was particularly impressed with the choir and with his conversations with Benedict Sheehan, the music director at the Seminary.

I had accepted to travel to Moscow at the end of November to participate in the celebrations surrounding the 10<sup>th</sup> anniversary of Patriarch Kirill’s enthronement as Patriarch of Moscow and All Russia, but the event was postponed by the Moscow Patriarchate due to COVID concerns. Nevertheless, His Grace Bishop Alexis, who had been scheduled to travel with me to Moscow, did in fact travel to Russia for a week, where he ordained one of his Alaskan seminarians who is studying in Moscow. It was also planned for Fr. Alexander Rentel to travel there for the Feast of St. Catherine, the patronal feast of our representation Church, but he was unable to do so because of his health.

6. *December Events.* I took the last two weeks in November as personal time and travelled to France to spend time at my family home in the Alps and to visit with family. Upon my return, I presided at the Liturgy for the Feast of St. Nicholas on the Old Calendar at St. Nicholas Cathedral in New York City. His Grace Bishop Matthew of Sourozh was scheduled to concelebrate with me but was unable to secure the appropriate visa to travel to the United States from Canada, where he was at the time.
7. *January and Recent Events.* I spent most of the month of January in the Washington area, which allowed me to visit my parishes and also participate in the March for Life. I hosted the participating hierarchs of the Assembly of Bishops at my St. Nicholas Cathedral for the Divine Liturgy, which was served by a priest and a deacon. I also led the traditional Orthodox service before the actual March. Later in January, I served in Bridgeport for the retirement of the former Chancellor of the Orthodox Church in America, Archpriest John Jillions, and also ordained a deacon for the Diocese of New England. At the end of the month, I served for the Feast of the Three Hierarchs at St. Vladimir's Seminary. Just today, I received a visit from two bishops of the Ukrainian Orthodox Church (MP), His Grace Bishop Viktor of Barshevskii and His Grace Bishop Dionysii of Pereyaslav-Khmelnytskyi, both vicars of His Beatitude Metropolitan Onufry.
8. *Relocation.* First, I would like to offer my sincere gratitude to Greg Honshul and Ray Steeb for their tremendous and professional leadership, not only of the Property Committee, but also of the Landing Committee and its various subcommittees. This has been a labor-intensive process and one, as they will report, which is not yet completed. In October, I reported that we were at a point where it was necessary to take a step back to more carefully reflect on the major undertaking that is the Chancery relocation project. Today, I am pleased to say that we are ready to take a step forward, or perhaps even several steps forward. I welcome the input and discussion to be held by the Metropolitan Council on this

particular subject, but I hope that we will positively consider the resolution that is being presented today.

I have remained committed to my intention of relocating to the Washington, DC, area and am prepared to initiate this process in a more concrete manner: by relocating my residence there by July 1 of this year, by securing a dignified temporary situation for the offices of the Chancery, and by beginning the process of gradually moving the appropriate Chancery staff, beginning this summer and continuing through next year. I do this for two main reasons, reasons which I have articulated before, but which nevertheless remain as the chief reasons for this relocation: 1) The Metropolitan should canonically and statutorily reside in his diocese, and the office which daily supports him should be with him; and 2) the greater Washington, DC, area provides one of the most effective locations for preaching the Gospel of Jesus Christ, and reaching out to the wider North American community.

9. *The Archives* are part of this consideration, and we will have a fuller presentation on that component as well, and a motion to consider.
10. *Our Apostolic Voyage*. Much of what I have stated very succinctly, I am intending to share with the broader Church in a fuller manner. Although I may not be able to prepare a second volume of my *Four Pillars* document, which I released at the time of the All-American Council in St. Louis, I am looking at ways to communicate my continued vision for the Apostolic work of the Orthodox Church in America. I have completed a 10-episode podcast series called “Our Apostolic Voyage,” which I plan on extending as an avenue of communicating with the broader Church about some of my own thoughts on our mission, including the benefits of a relocation to the Washington, DC, area.
11. *The Chancery*. In all of this activity, I am grateful for the support of the Chancery officers and staff, both those who are working here in person and those who are working remotely. Under the guidance of the Chancellor, Fr. Alexander Rentel, we



continue to see an increase in efficiency of my Office, even in these difficult COVID times. Fr. Alessandro Margheritino has shouldered many burdens, including the complex planning process that was involved in this week-long series of meetings in Cleveland and the ongoing work of the Archives relocation. I offer my thanks to Fr. Alessandro for his valiant efforts in work that often involves many frustrations and challenges, all of which he forges through valiantly and without complaint. In this, he is helped with great enthusiasm and energy by Barry Migyanko, who keeps a strong hand on all matters dealing with the logistics and functioning of the Central Administration. I am grateful to him for his persistence and for his perseverance.

You will hear more about the work of our other remote staff in the reports of Fr. Alexander and Fr. Alessandro, but I should also offer my gratitude to Andrew Smith, our Treasurer, and Susan Wisnewski, our Accounting Manager, with respect to all things financial; and to Fr. Thomas Soroka, who faithfully attends to the work of our Departments. Just recently added is Fr. Kyle Parrot, who has assumed the important role of Acting Communications Director. The rest of our communications team, including Fr. John Schroedel and Matushka Jessica Fuhrman, is to be commended, as is Alexis Liberovsky in the Archives. Alex recently represented the Orthodox Church in America at a conference in Serbia called to honor the centennial of the Russian Orthodox Church Outside of Russia, for which he offered a talk.

12. *My Personal Staff.* For some time, I have not had the benefit of a personal secretary or a personal aide and subdeacon. Those responsibilities had been handled by the current staff as best as possible. Fr. Larry Soper has been serving as my driver and assistant for most of my pastoral visits, in addition to providing administrative support for the Diaconal Vocations Program and other aspects of the Chancery operation. More recently, we have also engaged two part-time and remote staff members who will share in the various needs of my personal secretary: Dn .Peter Ilchuk—who is well-known to us as Council Manager for the All-American Council, and who was instrumental in assisting Fr. Alessandro with this

gathering in Cleveland—will be helping me with overseeing my correspondence and setting my calendar, and will also travel with me on occasion. Fr. John Mikitish will help me with the drafting of documents and with some aspects of external relations.

13. *The Pension Plan.* I offer my sincere thanks to Andrew Smith and all those who assisted him, first in the preparation of the initial pension plan review, and then with the further assessment provided by members of this body. I think we all recognize the gravity of the situation, but, at the same time, we acknowledge the value and benefit of the pension plan of the Orthodox Church in America. It is important that this body thoroughly review this matter and that it discuss this as long as is necessary to reach the appropriate conclusions. It is not likely that we will arrive at such conclusions at this meeting, but it is nevertheless important and necessary that this body undertake its due diligence in this matter.

Thank you, and I ask for your prayers.

### **Session Two (Thursday)**

14. *Finance and Investment Committee.* In light of the resolution adopted by the Metropolitan Council yesterday, and in anticipation of its confirmation by the Holy Synod in March, I would like to request that our Treasurer, Andrew Smith, engage the Finance and Investment Committee of the Metropolitan Council to do the following: a) formally review the compensation structure and the salary and stipend levels for all Chancery officers and staff, including the Metropolitan; b) ensure that they are in compliance with the compensation guidelines of the Orthodox Church in America; c) undertake this review with specific reference to the potential relocation of the Chancery offices and personnel to the greater Washington, DC, area; d) dialogue, at the appropriate time, with the Finance Committee of the Archdiocese of Washington to review and recalibrate, as necessary, the Archdiocesan financial contribution to the operation of the Central

Administration in its anticipated new geographical location; and e) report back on these matters to the Metropolitan Council by the Spring 2023 Meeting.

15. *Pension.* At the Fall 2021 Special Session of the Metropolitan Council (November 22, 2021), the Chancellor was authorized to enter into an agreement with Cheiron to review the pension plan. In December several introductory meetings were held between the Orthodox Church in America and Cheiron, and an engagement letter was signed. The pension review was discussed fairly extensively by the officers of the Church at their recent meeting in Washington, DC, and Andrew has kept me updated on the progress of the engagement. While it has not advanced as quickly as he would have liked, it is moving forward and we maintain the goal of having a report from Cheiron later this spring.

**Report of the Chancellor of the Orthodox Church in America**  
**Regular Spring 2022 Session of the Metropolitan Council, February 9-10, 2022**

**1. Introductory Remarks.** At our last meeting, in October 2021, I was able to offer a fuller report to the Metropolitan Council, because it covered a wider expanse of time with a whole range of activities. From October until now, there has been less reportable activity. Not that my work has lessened, but rather I have been involved in more routine matters. Consequently, this report will be shorter than the previous.

**2. Personal Remarks.** A key contributing factor to what I have just alluded to was that I contracted the virus in late-November and early-December. I tested positive on December 1, and only felt good for the whole day on December 23. I experienced a few relapses over the following weeks, which testifies to the seriousness of the virus. I am grateful to my colleagues at the Chancery who continued to work and cover my normal responsibilities while I was at home sick and in isolation. I also express my thanks to my colleagues and to various members of the Metropolitan Council who, upon finding out I was sick, regularly checked in on me and offered me encouragement. Between the two holidays (Thanksgiving and Nativity), I was out of the office more or less for around five weeks. I managed to do some work from home, but it was, I acknowledge at around the bare minimum. The sickness also forced me to cancel an extended overseas trip, and events closer to home. Needless my perspective on this virus is deeply colored by this experience. Please, I implore you: take every precaution. Receive the vaccine and the booster. Even though the omicron variant did not cause severe reactions, I suspect we might simply have been lucky. The next variant might prove as easy to spread as omicron, but might find a home deeper in the lungs and cause more respiratory problems.

**3. Chancery Work.** In terms of my actual work at the Chancery since the October meeting, I can divide it between pre-COVID and post. Pre-COVID saw the typical day-to-day routine. Additionally, the staff at the Chancery office spent a considerable amount of time after our Cleveland meeting processing the many things that came out of the meeting of the Metropolitan Council and the abbreviated meeting of the Holy Synod. Post-COVID, I have spent the time trying to catch up and get back up to speed after missing so much work.

**3.1 Omicron.** With the surge in the omicron variant in the New York metro area, and especially in Nassau County, I once again close the Chancery to outside visitors. We receive few visitors, to be sure, but this decision seemed prudent.

**4. Activities.** My list activities since October are as follows:

**4.1 Thyranoixia of St. Nicholas.** On November 2, 2021, Priest Larry Soper and I accompanied His Beatitude to Ground Zero and St. Nicholas Shrine for the Thyranoixia that His All-Holiness Ecumenical Patriarch Bartholomew presided at.

**4.2 Seminary Board Activity.** On November 4-5, together with His Beatitude, I participated in the in-person meeting of the Board of Trustees for St. Vladimir's Seminary. On December 20, I joined His Beatitude and the Board of Trustees for St. Tikhon's Seminary for a special meeting, which was held via Zoom.

**4.3 Visit of His Eminence Metropolitan Hilarion.** My office was involved in nearly every aspect of the visitation of His Eminence Metropolitan Hilarion, November 10-16, 2021. I met His Eminence at John F. Kennedy Airport on November 10, and saw him off on November 16. In between, Priest Larry Soper and I accompanied His Beatitude to St. Vladimir's Seminary on November 11 for the formal beginning of the Scriptural Conference that was held there. His Eminence was the first speaker at this conference. On Saturday, November 13, Fr. Alessandro and I traveled with His Beatitude to Northeastern Pennsylvania in order to host His Eminence at a private dinner at a local country club, and then see to his accommodations. On Sunday, November 14, Fr. Alessandro and I concelebrated the Divine Liturgy with His Beatitude and His Eminence and the monastery and seminary clergy. Afterwards, we accompanied them on a tour of the monastery and museum, and then joined them for lunch, which was hosted by Archpriest John Parker and his wife at their house.

**4.4 Cancellations.** I was invited to Constantinople to participate in a conference dedicated to the theme "The Patriarchal and Synodal Encyclical of 1920: 100 Years of Exceptional Influence," on December 1, 2021, in Istanbul, Turkey, organized by the Ecumenical Patriarchate. The patriarchate was set to cover expenses of all the participants (including airfare and hotel). Due to exposure to COVID (I had not yet tested positive), I was forced to cancel my trip. I was able to deliver my paper, "Overcoming Mistrust and Bitterness through Liturgical History" via Zoom. On that same trip, I was set to travel from there to Moscow in order to participate in and represent His Beatitude at the patronal feast of our representative Church, St. Catherine the Greatmartyr. I had to cancel this trip also, because by this point, I had tested positive for COVID.

**4.5 DC.** In the new year, Fr. Alessandro and I traveled to Washington, DC, to visit local Churches, and meet with His Beatitude. During our meetings, we were joined by Andrew Smith, on Sunday, January 16, for a meeting of the Church offices with His Beatitude, in order to discuss routine Church business. On Monday, January 17, the four of us met with Archpriest John Vitko, Chancellor of the Archdiocese of Washington, and Gregory Honshul (Ray Steeb was to have joined us, but winter weather caused his participation

to be cancelled). That meeting focused on the relocation of the Chancery from Syosset to Washington. The results of that meeting will be shared momentarily with you.

**5. St Sergius Chapel.** As I have previously described, because of increased travel of His Beatitude, and because Fr. Alessandro and Fr. Larry have been serving local area Churches, our service schedule at St. Sergius Chapel has been limited. With the surge of the omicron variant, His Beatitude and I took the decision to keep the Chapel closed at the same time the Chancery building itself has been closed to outsiders. As you know, the Chapel is small. Those few community members who come, between 3-6 people, are mostly elderly. Being concerned for their safety, and knowing that they could go to other local Churches, which are bigger and allow for social distancing, prompted this decision. Last Sunday we had services, and this week again we look to celebrate the Divine Liturgy. After this Sunday, given His Beatitude's travel schedule, I'm not sure when we'll have services next. I do anticipate that we will serve the Presanctified Liturgy on Wednesdays during lent so as to enable the Chancery staff easily to attend these services.

**6. Personnel Matters.** Regarding personnel matters, we have a new hire at the Chancery and a slight change in title for one of the staff members. Before I report on these, I will discuss staff evaluations. Beginning in early January, I took the opportunity to review and evaluate the Chancery staff. At this point, I have not had the opportunity to review a few members who receive stipend. I plan to meet with them in the next few weeks.

**6.1 The Process.** The process for the evaluations was along these lines: prior to the review I sent a general message to all those whom I would review asking them to provide a) a narrative description of what they do, which details their day-to-day work, and also lists what projects they are presently working on, b) a self-evaluation of their work using January 1, 2021 as a start date or their actual start day from this year (please include an evaluation of your own work, but also your collaborative work), c) a list of goals and projects they hope to accomplish for the upcoming year, d) a list of challenges they face in their position along with suggestions of how these challenges can be faced, and f) a list of any areas they would personally like to develop. These evaluations were turned in to me a day ahead of the review. I reviewed and noted areas that I would follow up. For the review of almost everyone, Fr. Alessandro joined me. His schedule did not allow him to be present for all, but he and I did most of the evaluations together. I note that His Beatitude and I reviewed Fr. Alessandro. His Beatitude and I need yet to schedule my own review, and he and I need to schedule Andrew for his review. Prior to the review itself too, a memorandum that I drafted was sent out to the whole staff that provided a structure for the review. I have attached this memorandum to my report.

**6.2 The Evaluations.** Without a doubt, I feel that the reviews were helpful to me understanding what is happening at the virtual Chancery. I have yet to fully report on them to His Beatitude, but I feel I understand much better what people do right now, areas where I need to readjust jobs (some people have picked up work that needs to be reassigned), and place where there are still gaps. The feedback I received from the staff, by inference, was that there needs to be greater efforts placed on general communication. We are working all over this continent, and *I* need to do a better job coalescing the team, above all through communication. I also have heard from members of the staff that I need to offer some gentle reminders about professional deportment, and foster better environment for collaborative work. I see these evaluations as establishing a base line from which I can continue to review and evaluate the staff.

**6.4. Priest Kyle Parrott.** I am happy to announce that, according to the conditions with which we initially engaged him, after his review, I have changed Fr. Kyle's title from Acting Director of Communications to the Director of Communications. He has his own report and I will let him speak as such.

**6.5 Emily Waters.** I am equally happy to report that we have engaged Emily Waters as the acting ORSMA Coordinator. Fr. Alessandro will introduce her shortly.

**6.6 Judge Lanier.** At the end of this month, I am traveling to Atlanta, GA on business. While there, I hope to meet with Judge Lanier and start the formal process of finding his successor as General Counsel. Obviously, we are not going to find *a* successor. We will probably have to build one in the aggregate. Nevertheless, at his request, I am hoping to begin this process with his input and guidance, including a timeline for the transition, which I hope allows for some overlap.

**7. Conclusion.** Finally, I offer again a word of appreciation to my colleagues at the Chancery, especially Fr. Alessandro, who, as I mentioned above, stepped in and saw to it that the Chancery continued to function smoothly in my absence. I am grateful also to all those who work in Syosset, but also the virtual Chancery. Thank you for your continued dedication and service to the Church. Your Beatitude, in the end, I thank you for your guidance and your leadership in all that we do at the Chancery.

## **Orthodox Church in America Annual Review and Assessment**

**General Premise.** As part of good stewardship in the Church, those given over to the particular charism of Church administration should be able to grow and develop within their positions at the Chancery of the Orthodox Church in America. In order to accomplish this, as with any job, both supervisors and employees need to have at least an annual opportunity to discuss the work of the staff member. This opportunity is not primarily an occasion for criticism, but one in which the supervisor and the staff member can reaffirm shared values and commitment to behavior necessary for work in the Church. This meeting should also be a time to examine the actual work done by the staff member and compare it with job descriptions or letters of employment. During the evaluation, the staff member should offer a personal assessment of their work, and receive feedback from their supervisor on their performance. Finally, the supervisor and the staff member should discuss and agree upon goals, projects, or special initiatives for the upcoming year.

**Shared Values and Necessary Behavior.** Above all, those of us who work at the Chancery have this as a shared value: a willingness to serve God's holy Church with a prior conviction of faith in Jesus Christ. If we chose to work for the Church, we should do everything to maintain faith in Christ, so that our service remains true to our calling to Church administration, and not one of self-aggrandizement or self-promotion.

Further, we work for the Church, and more specifically for His Beatitude Metropolitan Tikhon, at the Chancery. Our role as administrators is to support him and the members of the Holy Synod of Bishops in their ministry. We ourselves cannot in any way be a source of scandal or dissension. We must go about our work with honesty, dignity, confidentiality, and a scrupulous moral character. We work in the background, and only assume any sort of adversarial positions in the face of canonical irregularity.

The following paragraph, taken from the Chancery Employee Handbook, is worth reiterating: "Chancery employees are expected to adhere to high ethical and professional standards. You may not: engage in political activity or advocacy during work hours; accept bribes or kickbacks; discuss confidential Church business outside the work environment without supervisory clearance; knowingly provide erroneous information to other employees or supervisors. Chancery facilities, material, and equipment are for Church business only; you may not use Church property or other resources for personal business."

Finally, it should be noted that the Chancery is a small operation. It is incumbent upon everyone at the Chancery to work professionally and collaboratively, using conduct that demonstrates appropriate and respectful interpersonal behavior.



**Procedure.** The following procedure is to be followed:

**1. Job Description.**

*Prior to the meeting,* the supervisor reviews the staff member's narrative description of work they do, and compares it to what is presented in their job description or letter of employment.

*During the meeting:* Discrepancies between job descriptions and actual work should be addressed in the review. Consideration should also be given to any necessary rebalancing of work responsibilities or assignments based on the need of the Chancery. Resolution for any rebalancing should be sought at the meeting, or by an agreed upon time. The supervisor should also be sure that the staff member understands the expectations of their position.

**2. Self-Assessment.**

*Prior to the meeting,* the supervisor reads the self-evaluation prepared by the staff member. This self-evaluation should consider both the staff member's work, and how they collaboratively worked with others at the Chancery.

*During the review,* the self-evaluation should be discussed within the context of shared values and necessary behavior. The supervisor should also offer feedback on the self-assessment and overall work of the staff member.

**3. Goals, Initiatives, or Projects.**

*Prior to the meeting,* the supervisor reviews any list of goals, or initiatives, or projects that the staff member has proposed for this coming year.

*During the meeting,* these should be discussed with consideration given a) for the needs of the Chancery, b) any financial and time constraints, c) the personal development of the staff member, and d) measures of assessment.

**4. Challenges.**

*Prior to the meeting,* the supervisor reviews the list of challenges the staff member has indicated together with suggestions of how these challenges can be faced.

*During the meeting,* the supervisor and staff member should discuss the challenges presented and, if not solvable during the review, seek concrete next steps towards resolution. The solutions should be discussed with consideration given a) for the needs of the Chancery, b) any financial and time constraints, c) the personal development of the staff member, and d) measures of assessment

**5. Personal Development.**

*During the meeting,* a list of any areas the staff member would personally like to develop. These should be discussed with consideration given a) for the needs of the Chancery, b) any financial and time constraints, c) the personal development of the staff member, and d) measures of assessment

**Orthodox Church in America  
Metropolitan Council Meeting  
Virtual - February 2022  
Property Committee Report**

**Relevant Authorizations of prior MC Meetings**

**Minutes of 2020 Fall Session**

MOTION LINNEHAN/HONSHUL - To renew the Metropolitan Council's commitment and resolve to relocate the Metropolitan's residence to the Washington, DC area, to find suitable quarters for the Chancery and Archives and to proceed with the possible disposition of Westwood. CARRIED with two (2) opposed.

**Minutes of February 2020 MC Meeting**

MOTION LANE/STEEB – Whereas 1) It is not financially feasible for the necessary repairs and maintenance to be made to the current OCA Chancery building; and, 2) It is not possible for the OCA Archives to be properly preserved for the long-term if they remain in this building; Therefore, be it resolved that 1) Efforts shall be made immediately towards the sale of the Chancery property; 2) Efforts shall be made immediately to determine a location to house the offices of the OCA Chancery administration; 3) Efforts shall be made immediately to determine a location for the residence of the Metropolitan; and 4) Efforts shall be made immediately to determine a location to house the OCA Archives. CARRIED.

**Westwood Property**

**The Listing**

Original listing agent proposals indicated values of \$6.5 million and \$4.2 million, a third party that did not propose indicated a \$5 million value. We chose the listing agent that indicated a value of \$6.5 million.

We had "interests" between \$4 million and \$5 million, most were soft and only one was in writing. We turned down these "offers" since they were short of the \$6.5 million our listing agent indicated as the value of the property.

**Listing Agreement (Compass Realty - Fran Mazer)**

Met weekly or bi-weekly with Fran throughout the listing agreement period – we reviewed marketing efforts, resulting metrics, and discussed targeted marketing channels.

The original listing agreement went through May 2021, extended to December 31, 2021

The listing agreement was permitted to expire on December 31, 2021.

Requested the list of persons/entities that Fran introduced and showed the property to that the OCA would have to compensate Fran's fee if they would approach us within the 180 days following the expired agreement. We have not received, to date.

Additional note, there may have been indications of personality conflicts between our listing agent and other agents in the Long Island real estate community.

**Important Information Learned**

## **MC - Property Committee Report - February 2022**

### Tax Implications

Any developer is exposed to taxes of about \$250,000 annually from the date of closing until the developer sells the subdivided lots.

We pay a PILOT to OBC of about \$34,000 per agreement dating to 1959 with the Griswold's as a condition of the sale.

The property is assessed at about \$12.8 Million and is the basis of PILOT.

The county does the assessment and has no interest in our appeal since they receive no revenues.

### Development Challenges/Notes/Information (subdivision)

The current market for 2-acre lots in the area is \$1.1 Million, 5 acre lots are \$2 million.

There may be issues with using the rear access road to the property.

The development budget is about \$1.5 million to subdivide, install utilities and roads.

The current state of the home building industry and material availability is a challenge.

An Assisted living project was attempted, but OBC indicated they would approve 25 beds but not the 80 needed for the assisted living project to break even.

They needed a 40,000 SF addition.

### **Current Status of Westwood Sale**

Any/all the opportunities from Fran are no longer active.

Joan Valenti as her own company (formerly with Brown Harris Stevens) wanted to get a 60-day listing and provide marketing materials to market on CoStar and LoopNet, she would provide materials for us to use later for the exclusive 60-day listing.

Agents are contacting us, expressing interest in marketing Westwood, including Coldwell Banker and Century 21.

### **Considerations for moving forward**

Contact OCA-friendly developers to see if co-development is an opportunity.

List the property as a commercial property (new agent or with our prior agent)

Carrying cost of Westwood until final disposition ~ \$100,000 per year.

## **Move His Beatitude and OCA Chancery to Archdiocese of Washington, DC**

### **Background**

Work by the Property Committee and subsequently the Landing Committees has produced the following as it relates to the move of His Beatitude and the OCA Chancery offices to the Washington, DC Archdiocese.

## MC - Property Committee Report - February 2022

### **Timeline of Move Planning**

The development and socialization of the plan included these steps.

- The plan, including financial implications, was developed by a subcommittee of the Property Committee.
- The plan was reviewed with His Beatitude, and the Chancellor and the Secretary of the OCA.
- The adjusted plan was reviewed with the Treasurer of the OCA.
- The plan was reviewed and approved by the full Property Committee.
- The plan was discussed with the Finance Committee.
- The plan will be presented to the full Metropolitan Council at its virtual February 2022 meetings.

### **The Plan**

The plan is in stages

Stage 1 - Completed prior to the 20th AAC - Secure housing for the Metropolitan.

Stage 1A - Completed prior to the 20th AAC - Relocate the Secretary of the OCA.

Stage 1B - Completed prior to the 20th AAC - Secure and relocate the Chancery Offices of the OCA.

Stage 2 - Completed in 2025 - Permanent Chancery in the Archdiocese of Washington DC.

Funding for each stage

Funding needed for moves in 2022 - \$125,000.

Funding needed for move(s) in 2023 - Included in future operating budgets.

Funding needed for leases beyond 2022 budget year - included in future operating budget

Funding for permanent chancery - assessed after the final disposition of Westwood is determined

New Chancery Considerations

Professional space needs assessment is required.

Short-term requirements - next couple of years.

Middle Term requirements - Five to ten years.

Long Term requirements - Beyond 10 years.

Determine the "look and feel/image" of the permanent OCA Offices.

Buy/build determination - Middle and Long-Term needs.

**NOTE: The slide deck presented at the MC meeting referenced, is an extension of this written report.**

Respectfully Submitted,

Greg Honshul

Ray Steeb

**Report of the Secretary of the Orthodox Church in America**  
**2022 Spring Session of the Metropolitan Council**  
**February 9-10, 2022**

**OVERVIEW.** Your Beatitude, Reverend Fathers, Esteemed Members of the Metropolitan Council, since my last report in October, I have continued to settle in my position as Secretary, learning the many aspects of the job while the whole staff gets used to the new configuration of the office as outlined by the Chancery Restructure Committee.

The office continues to run smoothly striving to operate efficiently always with the clear understanding that we are here to serve His Beatitude Metropolitan Tikhon, and to support the work of the Holy Synod and the Church at large.

In this report I want to highlight a number of areas that fall, to a large extent, under the purview of the Office of the Secretary.

**WESTWOOD MANAGEMENT.**

The Property Committee will report on the current state of the relocation. While the office remains operational at Westwood, building maintenance remains necessary. Fortunately, we have not recently faced major issues other than the boiler frequently turning off—changing the filter and unclogging some pipes seems to have solved the problem. As previously reported, the gutters were cleaned for the first time in a long while, and one section was also repaired to prevent water from accidentally falling toward the basement windows. A couple of recent storms have shown those two actions to be very effective inasmuch as we have not found water in the basement. Overall, the general maintenance continues uneventfully for now, with the cleaning service coming once a week or once every two weeks, and our contracted landscaper plowing the driveway as needed.

In preparation for the move but also in the attempt to declutter many of the areas of the building, Susan Wisnewski, Fr. Larry Soper, and I have worked on all four floors, as time permits, decluttering rooms and closets, and throwing away broken and unnecessary items that have been collected for the past few decades. In December, we rented a 20-yard dumpster that was quickly filled. I note that a lot of the work was directed toward the basement to clean and declutter various areas in order to facilitate the preparation of the Archives for the move. To help us with this project, we engaged in December a seminarian from St. Vladimir's Seminary who comes to the Chancery once or twice week.

**INFORMATION TECHNOLOGY.** Over the past year, I have reported on a number of technology changes and improvements that the Chancery office has implemented. So far, these changes have proved to be very effective helping the Chancery staff work more efficiently. We are currently exploring a new platform for our database needs. The current database, which succeeded Microsoft Access, and which has been in service for a few years, presents various

limitations. With the help of Fr. John Schroedel, Barry Migyanko and I are currently considering Airtable as a possible option. We anticipate moving to this new system in the next few weeks.

Over the last couple of months, with the help of our seminarian intern, I have begun the digitization of parish folders. So far, we have scanned more than half of the entire section and, once done, we plan to begin digitizing clergy folders. It goes without saying that this is a substantial project which will require time and patience. We are nevertheless pleased with the progress already made and the ability to upload these files securely on BOX and, once Airtable is fully set up, integrate the new database to those BOX folders.

**SMPAC.** The Sexual Misconduct Policy Advisory Committee operates in an advisory capacity providing support on how to improve the content and effectiveness of the Policies, Standards, and Procedures on Sexual Misconduct, reviewing the extent to how the Church's PSPs are implemented and how compliance is ensured.

The current members of SMPAC are: Archpriest Alexander Rentel, Chancellor, Priest Alessandro Margheritino, Secretary, Ms. Emily Waters, Acting ORSMA Coordinator, Protodeacon Peter Danilchick, Ms. Cindy Heise, Mr. Robert Koory, Esq., and Mr. Bernard Wilson. Archpriest Alexander Garklavs, former Chancellor of the Orthodox Church in America, who has been instrumental in the establishment and development of SMPAC, ORSMA, and the PSPs, has recently asked His Beatitude to accept his resignation from this Committee as he prepares for his retirement. All of us are deeply thankful to Fr. Alexander for his many years of diligent service.

The Committee met via teleconference on February 27, 2022 and discussed matters of compliance especially in reference to the 2022 Diocesan Reports that are being prepared by each Diocese this month. The Committee met to also welcome Ms. Emily Waters who started on January 10, 2022 as *Acting* ORSMA Coordinator. Ms. Waters, LCSW, MPA, PhD(c) brings exceptional skills and experience. While Archpriest Alexander Rentel remains de facto the head of ORSMA in his position as Chancellor of the Orthodox Church in America, Ms. Waters, just like Cindy Heise before her, will both coordinate investigations and also be the person to whom sexual misconduct cases are reported. Ms. Waters will also work on other aspects of the prevention of sexual misconduct such as education, compliance, and policy revisions.

Ms. Waters and I have already met a number of times working on reorganizing and digitizing ORSMA files, processing background checks through Protect My Ministry, and looking at various areas of our policies that need updates.

As Secretary of the Orthodox Church in America, one of my responsibilities is to oversee PSP compliance for the Stavropegial Institutions but also to be the general administrator of the OCA account with Protect My Ministry, the company we use for criminal background checks youth safety training. In preparation for the 2022 Diocesan Reports, I have been working with Stavropegial clergy and institutions to maintain our compliance status.

**COMMUNICATION.** Priest Kyle Parrott, who was confirmed this past January as Communication Director, is offering a report on Communication. I note with thanks that Fr. Kyle, Matushka Jessica, and I continue to work very well together with press releases, articles, and statements that are prepared and posted on our website and social media platforms on a regular basis. As Fr. Kyle notes in his report, we have also increased our social media presence with daily postings.

In preparation for the 20<sup>th</sup> All-American Council, we have also prepared the Council Press Kit that has already been sent to the Local Committee to be distributed to various news agencies, we update the AAC webpage as news and relevant documents become available, and work on a number of press releases related to the Council.

**OPERATIONS.** In my position as Secretary, much of work is directed toward the planning and management of various meetings. Despite the numerous meetings to schedule every month with committees, boards, various bodies within the Church, this aspect of my work has recently intensified and will continue to be more demanding as we get closer to the 20<sup>th</sup> All-American Council. As Deacon Peter will report, registration went live last month, and the youth program registration will also go live in the next few days. Because the registration system utilized for the last two AACs is no longer available, we had to move to a new platform, Evanttia, which is, however, proving very effective.

There are a number of other important tasks under the purview of the Office of the Secretary and in which I am involved on an ongoing basis. I continue to maintain the 501C3 master list and work with a number of parishes on their tax-exempt status. I also continue to draft and maintain the Chancery Monthly Digest that is distributed every month to the Metropolitan Council, Diocesan Chancellors, and heads of Stavropegial Institutions. I continue to manage the web calendar accessible through the home page of our website.

**ARCHIVES.** As alluded to earlier, some of the Chancery staff has worked with Alexis Liberovsky, the OCA Archivist, in the basement decluttering and cleaning various areas of the Archives. We have also brought upstairs items (books, icon cards, etc.) that are clearly not Archival materials but that were sent to the basement for lack of another suitable place. We acknowledge that for many years the basement of Westwood has not only served to house the Archives, but it has been used as most “basements” are typically used. Although more work is to be done, we have made considerable progress. Alexis continues to respond to historical inquiries that he receives from within and outside of the Church, and Fr. Kyle and I have also asked him to write monthly historical articles for the website. Nonetheless, I have asked Alexis to direct most of his efforts toward the preparation of the Archives for its relocation. This is not something that can be accomplished overnight but, also in this, I am pleased to see the progress is finally being made.

In this section of my report, I want to offer a short synopsis of events surround the Archives in order to give a framework for the resolution that two members of the Metropolitan Council are putting forward for consideration.

In the discussion on the relocation, it is important to consider that the Archives of the Orthodox Church in America moved to the basement of Westwood sometimes in the 1960s, a few years after the Church acquired the property. The basement was always intended to be a temporary location for the Archival treasure of the Church, especially since it was—and continues to be—neither an honorable place nor suitable because of its humidity, high temperatures due to pipes running along the ceiling, and water infiltration from the basement windows. The Church has engaged in various conversations over the years regarding its relocation. The Archives Advisory Committee, established in 2013 “to assess the housing, preservation and access needs of the OCA Archives and to develop strategic solutions” (Committee Mission Statement), considered temporary measures in the current basement in order to improve preservation conditions until a new appropriate facility could be built. After receiving proceeds from the McGuire Family Charitable Remainder Trust in 2017, bids were solicited for a renovation of the basement for which the bids kept going up and eventually became too high. The possibility of a new building on the Westwood property was also acknowledged as a hope for the distant future. This was finally deemed out of the financial reach of the Orthodox Church in America.

At its 2020 Fall Meeting, the Metropolitan Council adopted a resolution that tasked the Archives Advisory Committee to issue a Request For Proposals (RFP) for the Archives of the Orthodox Church in America. The RFP was published on the OCA website on May 20, 2021 and was shared through different platforms such as the Society of American Archivists, the Association of Research Libraries, the Association for Slavic, East European, and Eurasian Studies, and the American Theological Library Association.

The RFP indicated the need to find an institution willing to house the Archives with the ownership remaining within the Orthodox Church in America. The institution willing to house the Archives would be asked to provide staffing to support the Archivist, seek grants, resume the digitization project, provide open access to both scholars and non-academic, as well as support the Church Administration with material requests and historical analysis even with short notice.

The initial deadline to submit a proposal was July 20. We received only four proposals in response to the RFP: St. Vladimir Orthodox Theological Seminary, St. Tikhon Orthodox Theological Seminary, Miami University (Oxford, OH), and Alex Liberovsky, OCA Archivist. The Archives Advisory Committee received and reviewed these proposals, and discussed them via teleconference on September 28, 2021.

At the Fall 2021 Session of the Metropolitan council in Cleveland, OH, a motion was presented to limit consideration of proposals received to those from Miami University of Ohio and St. Vladimir’s Seminary. That motion was carried with fourteen (14) votes in favor, thirteen (13) opposed votes and two (2) abstentions. As noted in the Minutes of the same Session, Metropolitan Tikhon announced that due to the split vote regarding proposals received for relocation of the OCA Archives, this matter would be deferred to the consideration of the Holy Synod for a final decision. Unfortunately, the Holy Synod’s Session that followed the Metropolitan Council was truncated because of a COVID case. At the Fall Special Meeting which



took place via teleconference in November, I informed the Council that, upon my return from the meeting in Cleveland, I was contacted by Dr. Scott Kenworthy of Miami University, OH, who related that the University was no longer able to receive the OCA Archives for financial reasons. At the same time, I acknowledged the November press release from St. Vladimir's that stated the vote of its Board of Trustees to relocate the Seminary to another part of the country. To clarify this point, having recently spoken with Fr. Chad Hatfield, the SVOTS Board is still working with outside consultants and committees, and the process is taking time. In other words, the move is not imminent. Already back in November following the press release, Fr. Chad informed me that the Seminary's interest in the Archives stands and, if the Seminary relocates in the years to come, the Archives would have an even better building in the new campus that SVOTS would construct.

Acknowledging that the proposal from Alexis Liberovsky is not viable mostly for financial reasons, and noting small progress on the possible building of the Library at St. Tikhon's Seminary, the proposal from St. Vladimir's Seminary remains the only viable option at this time. In consultation with Fr. Alexander Rentel, with the blessing of His Beatitude, and in preparation of the discussion on the Archives at this Spring 2022 Session, in mid-January I reached out to a number of Metropolitan Council members who live driving distance from St. Vladimir's Seminary to poll their interest in a possible visit to the Florovsky Library where the Seminary proposed the OCA Archives to be housed. Popadija Katherine Vitko, Matushka Evelyn Kreta, Gregory Honshul responded to our invitation and we planned our visit for Monday, January 31. The purpose of this visit was to see the physical space offered by the seminary and ask questions about their proposal. The visit was very positive, and we were pleasantly surprised to immediately note that the Seminary is both offering a lot more room to house the Archives and is willing to take much more than what they initially stated in their proposal. Specifically, they are offering five rooms located on the ground floor to the rear of the building, with the largest being approximately twenty-five by fifty feet, and the smaller rooms, each about twelve by eight feet. Welcoming us to the Florovsky Library were Father Chad Hatfield, SVOTS President, Dr Alex Tudorie, Academic Dean, and Danielle Earl, Librarian. We noted that the space offered is in good condition and climate-controlled, and it was our general understanding that it would provide sufficient room to house the Archives. Although we knew that the initial proposal received was intended to simply initiate the conversation and not to set final parameters, we were glad to hear that St. Vladimir's is willing to take more than what they initially stated, and that regarding the digitization, they are willing to also digitize any video and audio files as long as these materials have historical value and are indeed part of the Archives.

After our visit, two members of the Metropolitan Council, Popadija Katherine Vitko and Gregory Honshul, wrote a short report to share with the rest of the Council. Additionally, they are putting forward a resolution for consideration deciding in principle to relocate the Archives to St. Vladimir's pending the blessing of the Holy Synod that will meet in mid-March, as well as the consideration of many aspects of this relocation which would need to be articulated in a contract. If the Metropolitan Council were to vote in favor of this resolution, there are a number of steps that will need to be taken: 1) The Central Administration would have to determine exactly what will need to be retained by our office and moved to Washington, D.C.;

2) A delegation from St. Vladimir's will have to visit the Archives again and determine if there is any part of the collection that they would not be interested in taking; 3) Consider the question of ownership and management of the Archives; 4) Consider a number of provisions to be included in the agreement were the Seminary ever to dissolve, move to another jurisdiction, etc.; 5) Consider the funds earmarked for the Archives and determine if they can be used to facilitate the relocation and the purchase of shelving units. There will likely be other aspects to consider but these are five of the major ones.

As a point of clarification, Fr. Alexander Rentel, Barry Migyanko, and I have initiated a conversation about what would need to be retained by our office and thus moved to Washington. In our estimation, we would retain the "Official Records of the Church" that are the following files: 1. Financial 2. Insurance 3. Holy Synod Minutes 4. Metropolitan Council Minutes 5. AAC Minutes 6. Personnel/HR files of Chancery Employees 7. Clergy files, active and inactive 8. Parish, monasteries, and institutions 9. Departments, offices, committee reports.

From our visit, it seems to me that St. Vladimir's is a strong proposal not only because it offers a safe and appropriate space for the Archives, but it is also a Stavropegial Institution of the Orthodox Church in America with Metropolitan Tikhon serving as the Chairman of the Board. The Seminary houses the most extensive Orthodox library in the English language worldwide, and the Archives would find a suitable environment where they could be of service to the larger Church and the academic world even more than they have been able to over the past sixty years. Our discussion on the Archives relocation should first and foremost be focused on what is best for this precious treasure. It seems that the Florovsky Library would indeed offer worthy and necessary preservation, visibility, and access to the Archives of the Orthodox Church in America.

In Christ,

Priest Alessandro Margheritino  
Secretary of the Orthodox Church in America

**Archive Project**  
**Evaluation Report for St Vladimir Seminary**  
**Orthodox Church in America**

**January 31, 2022**

Attendees: Fr Alexander Rentel, Chancellor of OCA  
Fr Alessandro Margheritino, Secretary of OCA  
Mat. Evelyn Kreta, Metropolitan Council, Ad hoc group  
Pop. Katherine Vitko, Metropolitan Council, Ad hoc group  
Gregory Honshul, Metropolitan Council, Property & Ad hoc group  
Fr Chad Hatfield, President of St Vladimir's Seminary  
Dr. Ionut-Alexandru Tudorie, Academic Dean, St Vladimir's Seminary  
Danielle Earl, Librarian of St Vladimir's Seminary

**St Vladimir's Seminary – Rangos Building – Florovsky Library**

Named in honor of John G Rangos Family Foundation Building, holds 160,000 volumes and over 350 periodicals, and at 28,700 square feet, holds enough space to grow to more than 250,000 volumes. James Hadley Billington (13<sup>th</sup> Librarian of Library of Congress) describes the facility as, “the richest library of Eastern Christian holdings in the Western Hemisphere”. Construction of the Rangos building, completed in 2001, includes office spaces, a large three hundred seat auditorium on the top floor, the Florovsky Library area on ground level, two seminar/study rooms and seating in the circulation area for forty-five people. The building is modern and attractive.

Space dedicated to storage of OCA archive materials, includes a block five separate (adjacent to one another) rooms located on the second floor to the rear of the building, the largest is approximately twenty-five by fifty feet and the smaller rooms, each about twelve by eight feet.

The building, including the library and archive spaces, are both designed to include environmental controls, for the management of humidity and temperature. The four smaller rooms are currently in use for storage of existing archives (i.e., Florovsky, Meyendorf and Schmemann materials) which appear orderly, with documents organized into boxes or filing systems, after cleaning. The largest space is open, and would require the purchase of shelving, with the OCA bearing the expense. There is also office space available for use by the future archivist.

**Status of St Vladimir's Seminary**

Fr Chad clarified their long-term intention is to relocate from their current location. The main reasons being the expense to maintain their present location and the inability for needed expansion, as they grow, beyond the current geographic boundary. The reported estimated cost to renovate and maintain current facilities totaled over \$100 million and considered prohibitive.

St Vladimir Seminary strives for excellence and to have the distinction, of recognized, by their peers as a world-class institution for Orthodox higher learning. Them, providing access to and preserving the OCA Archive will further their efforts to maintain this standard.

Relocation of St Vladimir's Seminary will not interfere with their responsibility to the OCA archive, and in the long-term, a newer campus will further benefit the legacy of the OCA's historical archive.

#### Which OCA Materials to Archive?

St Vladimir's reported they are interested in preserving the bulk of the OCA's historical archive, plus any materials of significant historical value. This is dependent on the volume of material and space required. Any material, deemed to be of historical value, regardless of format could be eligible for collection, such as, but not limited to, media collections of video and music tapes, and parish anniversary booklets.

Dr Tudorie clarified, documents of interest which have become published in recent years, are typically already available in electronic form (digitized).

#### Collection Process

St Vladimir's staff will commute to Westwood, identify the bulk of the OCA's historical archive, collect, box, and remove for transportation back to St Vladimir's Seminary, at their expense.

#### Eli Lilly Grant & Grant Funding (digitization)

St Vladimir's staff reported they applied for an Eli Lilly Grant, to fund development of learning programs in support of St Herman's clergy training in Alaska. St Vladimir's Seminary was not Eli Lilly's first choice but has since acknowledged the urgency of St Herman's need and will reconsider supporting these efforts. The news is encouraging, and St Vladimir's is anticipating the announcement of a funding grant from Eli Lilly. St Vladimir's staff confirmed they will bear responsibility for expense associated with hiring an archivist, additional support staff and the cost of cleaning, organizing, and digitizing (historically designated) archive materials.

#### Access to Archived Materials

A research room, with work desk and computer, will allow researchers on-site digital access to archived materials. We expressed concern for safety and security of materials, and the St Vladimir's staff described their policies to guard against theft and damage

#### Next Steps

We completed our evaluation tour and each party voiced mutual interest to collaborate with one other and continue the discussion. St Vladimir's staff expressed a next logical step would be for them to visit Westwood and view the OCA historical archive, estimate the size and volume, and determine resources necessary to initiate the relocation process.

OCA representatives voiced their approval and invited St Vladimir's Seminary staff to come and participate in the archive discussion slated for the February Metropolitan Council Meeting.

Respectfully submitted,

Pop. Katherine Vitko and Gregory Honshul

## Orthodox Church in America

### Treasurer's Report

Metropolitan Council – February 2022

Your Beatitude, Your Eminences, Your Graces, Reverend Fathers, brothers and sisters,

Glory to Jesus Christ!

We have just completed a successful year with respect to the financial management of the Orthodox Church in America. As we have continued to manage the day-to-day transactions of the church, we have also undertaken significant projects relating to the OCA Pension Plan, relocation of the Chancery to the Washington D.C. area, and planning for the All-American Council. I'm grateful to my colleagues at the Chancery for their support and collegiality through each of these endeavors.

What follows is my update on the finances of the OCA through the end of 2021—with a look ahead at amendments to the 2022 budget and financial activity pertaining to this year's All-American Council. As you review these items in preparation for the Metropolitan Council meeting, please feel free to contact me at [asmith@oca.org](mailto:asmith@oca.org) with any questions.

#### **FY2020 Audited Financial Statements**

At the Fall Metropolitan Council meeting, I presented a draft version of the FY2020 financial statements and noted that, while audit fieldwork had been completed, we were awaiting one item for footnote disclosure. Having subsequently received that, we issued final audited statements in November 2021. Those final statements are presented as **Attachment A** for your review and formal receipt. We intend to have representatives from Satty, Levine & Ciacco, CPAs, P.C., our auditing firm, available at the meeting to lead us in this discussion.

#### **Fiscal Year 2021 – Preliminary Annual Results**

Enclosed as **Attachment B** is the quarter- and year-end Treasurer's Report for 2021 OCA operating activities at 12/31/2021. The report includes:

- Statement of Operating Activity – Unrestricted
- Statement of Operating Activity – Restricted
- Comparative Balance Sheet for 12/31/2021 and 12/31/2020

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect adjustments.

Overall, revenue collection for the year was good (112% of budget), with Diocesan contributions alone coming in 7.5% higher than expected. Notably, individual giving (primarily through the Stewards of the OCA campaign) exceeded expectations, by over 40%. Expenses were well below anticipated (80.59% of overall expense budget) due largely to staff vacancies and the curtailment of meetings and travel expenses for some of 2021. Net income was \$583K.

In addition to the annual operating activity (unrestricted revenue and expense), the following endowed fund investment activity is provided, showing a 13.03% increase in value from 12/31/2020 to 12/31/2021:

	Market Val.	Market Val.	Annual Rate
Investment Accounts	12/31/2020	12/31/2021	of Return
Main Endowment Fund, incl Rotko	1,660,858.51	1,900,806.28	14.45%
FOS Endowment Fund	103,981.79	129,651.38	24.69%
St. Andrew Endowment Fund	130,458.48	150,008.97	14.99%
Kavalenko	75,096.89	74,172.66	-1.23%
	1,970,395.67	2,254,639.29	14.43%
OCCIF N/R (Mission Fund)	150,000.00	150,000.00	2.75% interest
Missions Fund	1,084,808.53	1,218,181.06	12.29%
	1,234,808.53	1,368,181.06	10.80%
	3,205,204.20	3,622,820.35	13.03%

## 2020 Internal Audit

The Internal Audit Committee of the OCA met in the Fall of 2021 to conduct the annual internal audit. The committee once again utilized a virtual approach as the audit was conducted remotely through a number of meetings and many email exchanges over the course of several months. Upon completing their work, the Internal Audit Committee presented Fr. Alexander and me with a report and some recommendations for improving clarity and process flow. Staff has already implemented some of these recommended changes and will work to address the remaining items.

The Committee's written and verbal report will be provided under separate cover.

## Fiscal Year 2022 – Budget Amendments

At the Fall 2021 Metropolitan Council meeting, staff proposed and the Metropolitan Council adopted a 2022 budget. Since the Fall 2021 meeting, staff has worked with the Finance & Investment Committee to consider a number of changes, including expenses related to the Chancery's move to Washington D.C.

Included as **Attachment C** is a budget document that shows the 2022 original budget, 2022 proposed amendments, and the 2022 proposed amended budget in columns D, E, and F, respectively (columns A, B, and C show 2021 budget-to-actual comparisons). The following pages include more detail about the proposed amendments at the account level. This amended budget proposes the use of just over \$70K in unrestricted reserves to help facilitate a mid-year move of most Chancery operations to the Washington D.C. area.

Staff recommends that the Metropolitan Council adopt the 2022 budget as amended in **Attachment C**.

### **All-American Council – Financial Planning**

Deacon Peter Ilchuk and I have continued to have discussions about budgetary considerations for the 20th All-American Council to be held this summer in Baltimore. **Attachment D** shows the actual revenue received and expenses incurred (on a cash basis) for the All-American Council through January 2022, compared to the overall budget for the Council. Notably, almost all diocesan contributions have been received and we are beginning to receive vendor booth and advertising revenue. We have also incurred a modest amount of expenses in preparation for the Council.

Respectfully Submitted,

Andrew Smith  
Treasurer

**THE ORTHODOX CHURCH IN AMERICA  
FINANCIAL STATEMENTS  
DECEMBER 31, 2020 AND 2019**



## TABLE OF CONTENTS

	<u>Page #</u>
Independent auditors' report	1
Statements of financial position	2
Statements of activities	3 - 4
Statements of functional expenses	5 - 6
Statements of cash flows	7
Notes to financial statements	8 - 18



## INDEPENDENT AUDITORS' REPORT

To the Board of Directors of  
The Orthodox Church in America

We have audited the accompanying financial statements of The Orthodox Church in America (a nonprofit Church), which comprise the statements of financial position as of December 31, 2020 and 2019, and the related statements of activities, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditors' Responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Orthodox Church in America as of December 31, 2020 and 2019, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Satty, Levine & Ciacco, CPAs, P.C.  
Melville, New York  
November 11, 2021

**THE ORTHODOX CHURCH IN AMERICA  
STATEMENTS OF FINANCIAL POSITION  
DECEMBER 31, 2020 AND 2019**

	<u>2020</u>	<u>2019</u>
<b>ASSETS:</b>		
Cash and cash equivalents	\$ 1,159,166	\$ 383,990
Restricted cash	351,108	415,360
Investments:		
Endowment pool fund	1,660,859	1,432,836
St. Andrew endowment fund	128,984	125,152
FOS endowment fund	103,982	86,866
Missions endowment fund	1,084,809	935,810
Annuity and unitrust fund	143,279	148,091
	<u>3,121,913</u>	<u>2,728,755</u>
Accounts receivable, net	164,957	196,386
Note receivable	150,000	150,000
Prepaid expenses	3,500	3,500
Property and equipment, net	315,287	341,159
	<u>315,287</u>	<u>341,159</u>
TOTAL ASSETS	<u>\$ 5,265,931</u>	<u>\$ 4,219,150</u>
<b>LIABILITIES AND NET ASSETS:</b>		
<b>LIABILITIES:</b>		
Accounts payable and accrued expenses	\$ 89,455	\$ 69,314
Retirement obligations	37,552	37,552
Annuity and unitrust agreements	100,527	106,527
	<u>100,527</u>	<u>106,527</u>
TOTAL LIABILITIES	<u>227,534</u>	<u>213,393</u>
<b>NET ASSETS:</b>		
Without donor restrictions		
Undesignated	991,039	245,606
Invested in property and equipment	315,287	341,159
	<u>315,287</u>	<u>341,159</u>
Total without donor restrictions	1,306,326	586,765
With donor restrictions	3,732,071	3,418,992
	<u>3,732,071</u>	<u>3,418,992</u>
TOTAL NET ASSETS	<u>5,038,397</u>	<u>4,005,757</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 5,265,931</u>	<u>\$ 4,219,150</u>

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**  
**STATEMENT OF ACTIVITIES**  
**FOR THE YEAR ENDED DECEMBER 31, 2020**

	<b>Without Donor Restrictions</b>	<b>With Donor Restrictions</b>	<b>Total</b>
<b>OPERATING SUPPORT, REVENUES AND RECLASSIFICATIONS</b>			
Support:			
Diocesan assessments	\$ 1,762,805	\$ -	\$ 1,762,805
General contributions	112,395	53,383	165,778
Total support	1,875,200	53,383	1,928,583
Revenues:			
Interest and dividends	9,494	27,898	37,392
Investment income, net	21,595	348,211	369,806
Other revenue	231,481	-	231,481
Total revenues	262,570	376,109	638,679
Reclassifications:			
Net assets released from restrictions	125,030	(125,030)	-
Total operating support, revenue and reclassifications	2,262,800	304,462	2,567,262
<b>EXPENSES:</b>			
Program services	493,598	-	493,598
General and administrative	1,031,139	-	1,031,139
Development	18,502	-	18,502
Total expenses	1,543,239	-	1,543,239
Change in net assets from operations	719,561	304,462	1,024,023
Nonoperating activities			
Change in actuarial value of annuities and unitrusts	-	6,000	6,000
Investment income, net	-	2,617	2,617
Total operating activities	-	8,617	8,617
Change in net assets	719,561	313,079	1,032,640
Net assets at beginning of year	586,765	3,418,992	4,005,757
Net assets at end of year	\$ 1,306,326	\$ 3,732,071	\$ 5,038,397

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**  
**STATEMENT OF ACTIVITIES**  
**FOR THE YEAR ENDED DECEMBER 31, 2019**

	<b>Without Donor Restrictions</b>	<b>With Donor Restrictions</b>	<b>Total</b>
<b>OPERATING SUPPORT, REVENUES AND RECLASSIFICATIONS</b>			
Support:			
Diocesan assessments	\$ 1,725,504	\$ -	\$ 1,725,504
General contributions	6,765	3,383	10,148
SOCA	68,075	8,654	76,729
Missions	-	2,275	2,275
Seminary	-	878	878
Charity	-	696	696
Donated services	3,980	-	3,980
Total support	<u>1,804,324</u>	<u>15,886</u>	<u>1,820,210</u>
Revenues:			
All-American council income	-	1,225	1,225
Interest and dividends	94	58,478	58,572
Investment income, net	-	421,296	421,296
Other revenue	18,395	-	18,395
Total revenues	<u>18,489</u>	<u>480,999</u>	<u>499,488</u>
Reclassifications:			
Net assets released from restrictions	<u>103,481</u>	<u>(103,481)</u>	<u>-</u>
Total operating support, revenue and reclassifications	<u>1,926,294</u>	<u>393,404</u>	<u>2,319,698</u>
<b>Expenses:</b>			
Program services	605,335	-	605,335
General and administrative	1,180,637	-	1,180,637
Development	66,356	-	66,356
Total expenses	<u>1,852,328</u>	<u>-</u>	<u>1,852,328</u>
Change in net assets from operations	73,966	393,404	467,370
Nonoperating activities			
Change in actuarial value of annuities and unitrusts	-	2,952	2,952
Investment income, net	<u>-</u>	<u>6,415</u>	<u>6,415</u>
Total operating activities	<u>-</u>	<u>9,367</u>	<u>9,367</u>
Change in net assets	73,966	402,771	476,737
Net assets at beginning of year	<u>512,799</u>	<u>3,016,221</u>	<u>3,529,020</u>
Net assets at end of year	<u>\$ 586,765</u>	<u>\$ 3,418,992</u>	<u>\$ 4,005,757</u>

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA  
STATEMENT OF FUNCTIONAL EXPENSES  
FOR THE YEAR ENDED DECEMBER 31, 2020**

	<u>Program Services</u>	<u>Management and General</u>	<u>Fundraising</u>	<u>Total</u>
<b>EXPENSES:</b>				
Salaries, wages and benefits	\$ 321,029	\$ 708,613	\$ -	\$ 1,029,642
Transportation, travel, meals and related expenses	15,743	41,782	-	57,525
Professional fees and other outside services	39,891	45,309	9,124	94,324
Scholarships, grants and other assistance	70,952	9,500	-	80,452
Equipment, supplies and other religious materials	9,869	13,244	195	23,308
Repairs and maintenance	-	36,159	-	36,159
Utilities	-	19,082	-	19,082
Telephone	3,088	14,716	9,094	26,898
Insurance	6,308	42,787	-	49,095
Printing, postage and delivery services	9,860	10,278	89	20,227
Dues, fee and subscriptions	10,792	11,953	-	22,745
Conferences and meetings	5,372	2,018	-	7,390
Bank charges	-	2,184	-	2,184
Depreciation expense	-	26,894	-	26,894
Facility payment in lieu of taxes	-	36,299	-	36,299
Miscellaneous	-	3,375	-	3,375
Interest expense	-	1,239	-	1,239
Payroll processing fees	694	5,707	-	6,401
<b>TOTAL EXPENSES</b>	<u>\$ 493,598</u>	<u>\$ 1,031,139</u>	<u>\$ 18,502</u>	<u>\$ 1,543,239</u>

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA  
STATEMENT OF FUNCTIONAL EXPENSES  
FOR THE YEAR ENDED DECEMBER 31, 2019**

	<b>Program Services</b>	<b>Management and General</b>	<b>Fundraising</b>	<b>Total</b>
<b>EXPENSES:</b>				
Salaries, wages and benefits	\$ 333,273	\$ 758,840	\$ 28,560	\$ 1,120,673
Transportation, travel, meals and related expenses	92,466	120,608	-	213,074
Professional fees and other outside services	55,060	44,282	33,000	132,342
Scholarships, grants and other assistance	64,896	-	-	64,896
Equipment, supplies and other religious materials	13,003	39,438	1,256	53,697
Repairs and maintenance	-	41,048	-	41,048
Utilities	37	25,691	-	25,728
Telephone	3,974	19,511	2,415	25,900
Insurance	-	43,436	-	43,436
Printing, postage and delivery services	7,977	8,771	1,125	17,873
Dues, fee and subscriptions	26,687	3,495	-	30,182
Conferences and meetings	7,860	1,144	-	9,004
Bank charges	102	2,307	-	2,409
Depreciation expense	-	29,077	-	29,077
Facility payment in lieu of taxes	-	40,103	-	40,103
Payroll processing fees	-	2,886	-	2,886
<b>TOTAL EXPENSES</b>	<b>\$ 605,335</b>	<b>\$ 1,180,637</b>	<b>\$ 66,356</b>	<b>\$ 1,852,328</b>

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA  
STATEMENTS OF CASH FLOWS  
FOR THE YEARS ENDED DECEMBER 31, 2020 AND 2019**

	<u>2020</u>	<u>2019</u>
<b><u>CASH FLOWS FROM OPERATING ACTIVITIES:</u></b>		
Change in net assets	\$ 1,032,640	\$ 476,737
<b>Adjustments to reconcile change in net assets to net cash (used in) provided by operating activities:</b>		
Depreciation expense	26,894	29,077
Loss on sale of van	1,303	-
Net (appreciation) in fair market value of investments	(392,006)	(330,714)
Net change in actuarial value of annuities and unitrusts	(6,000)	(2,952)
<b>(Increase) decrease in:</b>		
Accounts receivable	31,429	(2,874)
Grant receivable	-	345,700
Prepaid expenses	-	18,277
<b>Increase (decrease) in:</b>		
Accounts payable and accrued expenses	20,141	22,641
Retirement obligations	-	-
<b>TOTAL ADJUSTMENTS</b>	<u>(318,239)</u>	<u>79,155</u>
Net cash provided by operating activities	<u>714,401</u>	<u>555,892</u>
<b><u>CASH FLOWS FROM INVESTING ACTIVITIES:</u></b>		
Additions of property and equipment	(3,325)	(5,404)
Proceeds from sale of van	1,000	-
Proceeds from sale of investments	1,187,740	587,645
Purchase of investments	<u>(1,188,892)</u>	<u>(735,100)</u>
Net cash (used in) investing activities	<u>(3,477)</u>	<u>(152,859)</u>
Net increase in cash and restricted cash	710,924	403,033
Cash and restricted cash - beginning of year	<u>799,350</u>	<u>396,317</u>
Cash and restricted cash - end of year	<u>\$ 1,510,274</u>	<u>\$ 799,350</u>

See independent auditors' report and notes to financial statements.



**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 1. ORGANIZATION AND BASIS OF ACCOUNTING AND PRESENTATION**

**A. ORGANIZATION**

The Orthodox Church in America, ("the Church") was originally founded as a mission and later became a diocese in the Orthodox Church of Russia, uniting in its fold Orthodox Christians of various national backgrounds and traditions. It subsequently developed into a self-governing Metropolitanate, the Russian Orthodox Greek Catholic Church of America. Confirmation as an Autocephalous Church was accomplished by the action of the Patriarch and Holy Synod of Russia on April 10, 1970. The Church was proclaimed an Autocephalous Church on October 19, 1970, at the sessions of the All-American Council held at St. Tikhon's Monastery in South Canaan, Pennsylvania.

The Church is an Autocephalous Church with territorial jurisdiction in the United States of America and the Commonwealth of Canada. Its doctrine, discipline, and worship are those of the One, Holy, Catholic, and Apostolic Church as taught by the Holy Scriptures, Holy Tradition, the Ecumenical and Provincial Councils, and the Holy Fathers.

**B. BASIS OF ACCOUNTING**

The financial statements of the Church have been prepared on the accrual basis of accounting and, accordingly, reflect all significant receivables, payables and other liabilities.

**C. BASIS OF PRESENTATION**

The financial statements of The Orthodox Church in America have been prepared in accordance with U.S. generally accepted accounting principles ("US GAAP"), which require The Orthodox Church in America to report information regarding its financial position and activities according to the following net asset classifications:

**Net assets without donor restrictions:** Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Church. These net assets may be used at the discretion of The Orthodox Church in America's management and the board of directors.

**Net assets with donor restrictions:** Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of The Orthodox Church in America or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities.

**D. MEASURE OF OPERATIONS**

The statements of activities report all changes in net assets, including changes in net assets from operating and nonoperating activities. Operating activities consist of those items attributable to The Orthodox Church in America's ongoing services and interest and dividends earned on investments. Nonoperating activities are limited to resources that generate return from investments and other activities considered to be of a more unusual or nonrecurring nature.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**A. CASH AND CASH EQUIVALENTS**

The Church considers all highly liquid investments with an original maturity of three months or less when purchased to be cash equivalents.

**B. INVESTMENTS**

Investments are reported at cost, if purchased, or at fair value, if donated. Thereafter, investments are reported at their fair values in the statements of financial position, and changes in fair value are reported as investment return in the statements of activities. Purchases and sales of securities are reflected on a trade-date basis. Gains and losses on sales of securities are based on average cost and are recorded in the statements of activities in the period in which the securities are sold. Interest is recorded when earned. Dividends are accrued as of the ex-dividend date.

**C. FAIR VALUE MEASUREMENTS**

Fair value is defined as the price that would be received to sell an asset in the principal or most advantageous market for the asset in an orderly transaction between market participants on the measurement date. Fair value should be based on the assumptions market participants would use when pricing an asset. US GAAP establishes a fair value hierarchy that prioritizes investments based on those assumptions. The fair value hierarchy gives the highest priority to quoted prices in active markets (observable inputs) and the lowest priority to an entity's assumptions (unobservable inputs). The Church groups assets at fair value in three levels, based on the markets in which the assets and liabilities are traded and the reliability of the assumptions used to determine fair value. These levels are:

**Level 1:** Unadjusted quoted market prices for identical assets and liabilities in active markets as of the measurement date.

**Level 2:** Other observable inputs, either directly or indirectly, including:

- Quoted prices for similar assets and liabilities in active markets.
- Quoted prices for identical or similar assets or liabilities in markets that are not active.
- Inputs other than quoted prices that are observable for the asset/liability.
- Inputs that are derived principally from, or corroborated by, other observable market data.

**Level 3:** Unobservable inputs that cannot be corroborated by observable market data.

**D. ACCOUNTS RECEIVABLE**

Accounts receivable are stated at the amount management expects to collect from outstanding balances. Management provides for probable uncollectible amounts through a provision for bad debt expense and an adjustment to the valuation allowance based on its assessment of the current status of individual accounts. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a credit to accounts receivable. Management has determined that no allowance is needed at December 31, 2020 and 2019.

**E. PROPERTY AND EQUIPMENT**

Building and equipment are stated at cost or at their estimated fair market value if donated. Costs in excess of \$3,000 and the value of donated property and equipment are capitalized. Depreciation is provided on the straight-line method over the estimated useful life of the asset. The estimated useful lives of assets are as follows:

Building and improvements	5-40 years
Furniture, fixtures and equipment	5-7 years
Auto and truck	3-10 years
Software	5-7 years

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

**F. ENDOWMENT INVESTMENT AND SPENDING POLICIES**

The Church maintains master investment accounts for its donor-restricted endowments. Realized and unrealized gains and losses from securities in the master investment accounts are allocated monthly to the individual endowments based on the relationship of the market value of each endowment to the total market value of the master investment accounts, as adjusted for additions to or deductions from those accounts. In classifying such funds for financial statement purposes as either net assets with donor restrictions or net assets without donor restrictions, the Board of Trustees looks to the explicit directions of the donor where applicable and the provisions of the laws of the State of New York. The Trustees have determined that, absent donor stipulations to the contrary, the provisions of New York State law do not impose either a permanent or temporary restriction on the income or capital appreciation derived from the original gift.

The Board of Trustees, acting through its Investment Committee, has established an endowment spending policy to support the current level of income needed from the endowment, while sustaining the long-term purchasing power of the endowment assets over the long-term.

The Church follows investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowment while seeking to maintain the purchasing power of the endowment assets. Endowment assets include those assets of donor-restricted funds that the Church must hold in perpetuity, or for donor-specified periods. Under this policy, the endowment assets are invested in a manner that is intended to maximize returns while assuming a conservative level of investment risk. Actual returns in any given year may vary.

To satisfy its long-term rate-of-return objectives, the Church relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Church targets a well-diversified and balanced asset allocation portfolio to achieve its long-term return and growth objectives within prudent risk constraints.

**G. CONTRIBUTIONS AND DIOCESAN ASSESSMENTS**

Contributions received are recorded as net assets without donor restrictions or net assets with donor restrictions, depending on the existence and/or nature of any donor-imposed restrictions. Contributions that are restricted by the donor are reported as an increase in net assets without donor restrictions if the restriction expires in the reporting period in which the contribution is recognized. All other donor restricted contributions are reported as an increase in net assets with donor restrictions, depending on the nature of restriction. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions.

Contributed property and equipment are recorded at fair value at the date of donation. Contributions with donor-imposed stipulations regarding how long the contributed assets must be used are recorded as net assets with donor restrictions; otherwise, the contributions are recorded as net assets without donor restrictions.

Diocesan contributions or assessments are recorded as revenue in the year the dioceses are assessed. Such revenue is calculated and assessed based upon an approved percentage of each diocese's budget.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

H. CONTRIBUTED SERVICES

Contributed services are recognized as contributions at their estimated fair value in accordance with the Financial Accounting Standards Board authoritative guidance on *Accounting for Contributions Received and Contributions Made*, if the services (a) create or enhance nonfinancial assets or (b) require specialized skills, are performed by people with those skills and would otherwise be purchased.

For the years ended December 31, 2020 and 2019, The Orthodox Church in America received donated professional services in the amount of approximately \$0 and \$3,980, respectively.

I. FUNCTIONAL EXPENSE ALLOCATION

The costs of providing program and other activities have been summarized on a functional basis in the statements of activities and functional expenses. Expenses which are easily and directly associated with a particular program or supporting service are charged directly to that functional area. Certain other expenses have been allocated among the program and supporting services benefited. Such allocations are determined by management on an equitable basis.

The expenses that are allocated include the following:

<u>Expense</u>	<u>Method of Allocation</u>
Salaries, wages and benefits	Time and effort
Transportation, travel, meals and related expenses	Actual or time and effort
Professional fees and other outside services	Actual or time and effort
Scholarship, grants and other assistance	Actual
Other	Actual, square footage or time and effort

J. USE OF ESTIMATES

Management uses estimates and assumptions in preparing financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and the reported revenues and expenses. On an ongoing basis, management evaluates the estimates and assumptions based on new information. Management believes that the estimates and assumptions are reasonable in the circumstances; however, actual results could differ from those estimates.

K. IMPAIRMENT LOSSES

Management reviews property and equipment for impairment whenever events or changes in circumstances indicate that the carrying value of the asset may not be recoverable. Impairment is measured at the amount by which the carrying value exceeds the asset's fair value. If the asset is determined to be impaired, an impairment loss is recognized as a non-operating expense (non-cash) in the year the impairment was determined. There were no impairment losses recognized during the years ended December 31, 2020 and 2019.

L. INCOME TAXES

The Church is exempt from federal income taxes under section 501(c)(3) of the Internal Revenue Code and comparable New York State law. Contributions to it are tax deductible within the limitations prescribed by the code.

The most significant tax positions of the Church are its assertion that it is exempt from income taxes and its determination of whether any amounts are subject to unrelated business tax. All significant tax positions have been considered by management. It has been determined that it is more likely than not that all tax positions would be sustained upon examination by taxing authorities.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)**

**M. RECLASSIFICATION**

Certain amounts in the prior year's financial statements have been reclassified to conform to the current year's presentation.

**N. ANNUITY AGREEMENTS**

The Church established gift annuities whereby donors may contribute assets in exchange for the right to receive an annual return during their lifetime. This transaction provides for a portion of the transfer to be considered a charitable contribution for income tax purposes. The difference between the amount of the annuity and the liability for future payments, determined on an actuarial basis, is recognized as income at the date of gift. The actuarial liability for annuities payable is evaluated annually (giving effect to investment income and payments to annuitants) and any surplus or deficiency is recognized as change in actuarial value of annuities and unitrusts in the statements of activities. Assets held for annuities payable totaled \$68,182 at December 31, 2020 (\$72,245 in 2019). The present value of the remaining future liability to be distributed by the Church amounted to \$56,759 in 2020 and \$61,043 in 2019.

**O. UNITRUST AGREEMENTS**

The Church is named as beneficiary of various charitable remainder unitrusts and acts as the trustee. These agreements provide for the payment of lifetime distributions to the grantor or other designated beneficiaries. Upon receipt of these agreements, the actuarially determined present value of future payments is recorded as a liability. The remaining portion of the trust attributable to the Church's future interest is recorded in the statements of activities as contributions with donor restrictions in the period received. On an annual basis, the present value of the remaining future liability is revalued based upon actuarial assumptions. Assets held in the charitable remainder unitrusts totaled \$75,097 at December 31, 2020 (\$75,846 at December 31, 2019). The present value of the remaining future liability to be distributed by the Church is calculated using various rates and applicable mortality tables and totaled \$43,768 at December 31, 2020 (\$45,485 at December 31, 2019).

**NOTE 3. AVAILABILITY AND LIQUIDITY**

The following represents The Orthodox Church in America's financial assets at December 31, 2020 and 2019:

Financial assets at year end:	<u>2020</u>	<u>2019</u>
Cash and cash equivalents	\$ 1,159,166	\$ 383,990
Restricted cash	351,108	415,360
Investments	3,121,913	2,728,755
Accounts receivable, net	164,957	196,386
Total financial assets	<u>4,797,144</u>	<u>3,724,491</u>
Less amounts not available to be used within one year:		
Net assets with donor restrictions	<u>3,732,071</u>	<u>3,418,992</u>
Financial assets available to meet general expenditures over the next twelve months	<u>\$ 1,065,073</u>	<u>\$ 305,499</u>

The Church's goal is generally to maintain financial assets to meet the general operating expenses.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 4. RESTRICTED CASH**

The cash is restricted for the purpose of the thriving in ministry initiative grant. Restricted cash at December 31, 2020 and 2019 consisted of the following:

	<u>2020</u>	<u>2019</u>
Restricted cash - Thriving in ministry program	\$ 351,108	\$ 415,360

**NOTE 5. INVESTMENTS**

Investments are reported at fair value in accordance with authoritative guidance issued by the Financial Accounting Standards Board on *Accounting for Certain Investments Held by Not-for-Profit Organizations*. Fair value is determined by using quoted market prices, where available. When quoted market prices are not available, the present value of estimated or expected future cash flows or another reasonable method is used.

Investments as of December 31, 2020 and 2019 are summarized as follows:

	<u>2020</u>	<u>2019</u>
Corporate equity securities	\$ 2,534,801	\$ 2,078,111
Money market funds	406,730	444,529
Fixed income securities	39,721	60,849
Mutual funds	72,479	73,021
Annuity investments	68,182	72,245
	<u>\$ 3,121,913</u>	<u>\$ 2,728,755</u>

At December 31, 2020 and 2019, all investments were considered level 1 investments, except for the annuity investments which were considered level 2 investments.

**NOTE 6. PROPERTY AND EQUIPMENT**

Property and equipment at December 31, 2020 and 2019 consisted of the following:

	<u>2020</u>	<u>2019</u>
Land (non-depreciable)	\$ 45,000	\$ 45,000
Archive room improvements in progress (non-depreciable)	104,067	104,067
Building and improvements	570,508	570,508
Furniture, fixtures and equipment	197,142	200,787
Software	33,000	33,000
Total property and equipment	<u>949,717</u>	<u>953,362</u>
Less: Accumulated depreciation	<u>(634,430)</u>	<u>(612,203)</u>
Property and equipment, net	<u>\$ 315,287</u>	<u>\$ 341,159</u>

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA  
NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2020 AND 2019**

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**NOTE 7. EMPLOYEE BENEFIT PLANS**

**PENSION PLANS:**

Substantially all full-time employees participate in The Orthodox Church in America Pension Plan (Plan). This multi-employer plan, administered by the pension board of the Church, is a contributory plan, and provides defined benefits based on years of service and remuneration near retirement. The risks of participating in this multi-employer plan differ from single-employer plans in the following aspects:

- a) Assets contributed to the Plan by one employer may be used to provide benefits to employees of other participating employers;
- b) If a participating employer stops contributing to the Plan, the unfunded obligations of the Plan may be borne by the remaining participating employers;
- c) if the Church chooses to stop participating in the Plan, it may be required to pay to the Plan an amount based on the underfunded status of the Plan, referred to as a withdrawal liability.

Eligible employees are all employees of the Church and its related entities, except for employees that are older than age 60 and have not elected to be part of the Plan. Bishops and priests become members of the Plan on the first day of the month after they begin service with the Church. Full-time employees are eligible to participate in the Plan on the first day of the month after their date of hire. Participants with five years of services are entitled to pension benefits upon retirement. Pension benefits are provided to participants under several types of retirement options based upon years of service and age. Retirement benefits are paid to pensioners or beneficiaries in various forms of joint and survivor annuities, including a lump-sum payment option. Pension expense, representing the Church's required contribution to the Plan, was \$53,419 in 2020 and \$54,451 in 2019. The contribution made by the Church represented approximately 2.00% and 2.06% of the total contributions made to the Plan in December 31, 2020 and 2019, respectively. To the extent the Plan is underfunded, future contributions to the Plan may increase.

The Plan is a non-electing church plan which means the Plan sponsor has not elected to be covered by the terms of the Employee Retirement Income Security Act of 1974 (ERISA), and is not required to file Form 5500. The Plan's fiscal year is from January 1 to December 31.

The following table discloses the name and funded status of the Plan as of January 1, 2021 and 2020 (the date of the latest actuarial valuation), inclusive of the fair value of plan assets as December 31, 2020 and 2019:

<b>The Orthodox Church in America Pension Plan (Plan EIN: 06-1455789)</b>	<b>Actuarial present value of accumulated plan benefits</b>	<b>Fair value of plan assets</b>	<b>Total net contributions</b>	<b>Funded Status</b>
2020	\$ 55,086,863	\$ 26,326,678	\$ 2,672,980	47.79%
2019	\$ 55,648,391	\$ 24,957,647	\$ 2,642,534	44.85%

**OTHER RETIREMENT BENEFITS:**

In 2007, the Church entered into an agreement with a former employee whereby the Church agreed to make monthly payments of \$950 to the former employee in lieu of retirement benefits from the separate Orthodox Church in American Pension Plan. The agreement exists to rectify a situation whereby the former employee had been improperly excluded from participation in the Orthodox Church in America Pension Plan, and will continue until the former employee's death. Payments related to this agreement amounted to \$11,400 for each of the years ended December 31, 2020 and 2019. The actuarially calculated liability for future payments under this obligation amounted to approximately \$37,000 each year.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

**NOTE 8. PAYCHECK PROTECTION PROGRAM LOAN**

In April of 2020, the Church received loan proceeds in the amount of \$194,720 under the Paycheck Protection Program (“PPP”). The PPP, established as part of the Coronavirus Aid, Relief and Economic Security Act (Cares “Act”), provides for loans to qualifying business. The loans and accrued interest are forgivable after eight to twenty-four weeks as long as the borrower uses the loans proceeds for eligible purposes, including payroll, benefits, rent and utilities, and maintains its payroll levels. The amount of the loan forgiveness will be reduced if the borrower terminates employees or reduces salaries during the eight to twenty-four-week period.

At December 31, 2020, the Church was informed by letter from the Small Business Administration that the entire amount of the PPP loan was forgiven. The loan amount, plus accrued interest which was also forgiven, is included in other revenue on the statement of activities.

**NOTE 9. NET ASSETS WITH DONOR RESTRICTIONS**

Net assets with donor restrictions are restricted for the following purposes:

Net assets with donor restrictions, time and purposes were available for the following purposes as of December 31, 2020 and 2019:

	2019	Additions/ Investment Activities	Release	2020
Mission churches	\$ 1,085,810	\$ 113,758	\$ -	\$ 1,199,568
Thriving in ministries	413,777	4,800	69,415	349,162
Archives fund	90,961	-	-	90,961
Restricted endowments excess earnings	367,812	177,182	23,295	521,699
General purpose endowment excess earnings	207,028	72,263	13,377	265,914
Charity	69,601	-	-	69,601
Theological education - academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Seminary appeal	5,638	2,731	2,731	5,638
Mission planting	-	50,000	-	50,000
Youth director	43,126	1,750	8,994	35,882
Other	(475)	13,273	7,218	5,580
	<u>\$ 2,372,134</u>	<u>\$ 435,757</u>	<u>\$ 125,030</u>	<u>2,682,861</u>
Donor restricted endowment funds				
General purposes				244,120
Restricted purposes				776,762
Charitable remainder unitrust				<u>28,328</u>
Total net assets with donor restrictions				<u>\$ 3,732,071</u>

See independent auditors’ report.



**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

**NOTE 9. NET ASSETS WITH DONOR RESTRICTIONS (continued)**

	2018	Additions/ Investment Activities	Release	2019
Mission churches	\$ 878,320	\$ 207,490	\$ -	\$ 1,085,810
Thriving in ministries	470,698	-	56,921	413,777
Archives fund	106,954	-	15,993	90,961
Restricted endowments				
excess earnings	228,648	139,164	-	367,812
General purpose endowment				
excess earnings	131,571	75,457	-	207,028
Charity	68,923	695	17	69,601
Theological education -				
academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Seminary appeal	4,760	878	-	5,638
Youth director	-	54,907	11,781	43,126
Other	-	18,294	18,769	(475)
	<u>\$ 1,978,730</u>	<u>\$ 496,885</u>	<u>\$ 103,481</u>	<u>2,372,134</u>
Donor restricted endowment funds				
General purposes				240,736
Restricted purposes				775,762
Charitable remainder unitrust				<u>30,360</u>
Total net assets with donor restrictions				<u>\$ 3,418,992</u>

**NOTE 10. ENDOWMENTS**

The Church's endowments consist of approximately 40 individual funds established for a variety of purposes. Net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

The Church classifies as donor-restricted net assets (a) the original value of gifts donated to the donor-restricted endowment, (b) the original value of subsequent gifts to the donor-restricted endowment, and (c) accumulations to the endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund is classified as donor-restricted net assets until those amounts are appropriated for expenditure by the Church. The Church considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- 1) The duration and preservation of the fund.
- 2) The purposes of the Church and the donor-restricted endowment fund.
- 3) General economic conditions.
- 4) The possible effect of inflation and deflation.
- 5) The expected total return from income and the appreciation of investments.
- 6) Other resources of the Church.
- 7) The investment policies of the Church.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

**NOTE 10. ENDOWMENTS (continued)**

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor or endowment agreement requires the Church to retain as a fund of perpetual duration. In accordance with GAAP, deficiencies of this nature would be reported in net assets without donor restrictions and that future gains be allocated to net assets without donor restrictions until such losses have been restored.

The following represents a detail of the donor-restricted endowment net asset composition:

	With Purpose Restrictions	To be Held in Perpetuity	Total
Donor restricted endowments for 2020:			
General purposes	\$ 265,914	\$ 244,120	\$ 510,034
Restricted purposes	521,699	776,762	1,298,461
Total endowment funds	<u>\$ 787,613</u>	<u>\$ 1,020,882</u>	<u>\$ 1,808,495</u>
Endowment net assets, January 1, 2020	<u>\$ 574,840</u>	<u>\$ 1,016,498</u>	<u>\$ 1,591,338</u>
Investment return:			
Interest and dividend income, net of fees	27,899	-	27,899
Realized and unrealized gains	184,874	-	184,874
Total investment return	212,773	-	212,773
Contributions	-	4,384	4,384
Endowment net assets, December 31, 2020	<u>\$ 787,613</u>	<u>\$ 1,020,882</u>	<u>\$ 1,808,495</u>
	With Purpose Restrictions	To be Held in Perpetuity	Total
Donor restricted endowments for 2019:			
General purposes	\$ 207,028	\$ 240,736	\$ 447,764
Restricted purposes	367,812	775,762	1,143,574
Total endowment funds	<u>\$ 574,840</u>	<u>\$ 1,016,498</u>	<u>\$ 1,591,338</u>
Endowment net assets, January 1, 2019	<u>\$ 360,219</u>	<u>\$ 1,013,303</u>	<u>\$ 1,373,522</u>
Investment return:			
Interest and dividend income, net of fees	33,552	-	33,552
Realized and unrealized losses	181,069	-	181,069
Total investment return	214,621	-	214,621
Contributions	-	3,195	3,195
Endowment net assets, December 31, 2019	<u>\$ 574,840</u>	<u>\$ 1,016,498</u>	<u>\$ 1,591,338</u>

**NOTE 11. LEASE COMMITMENTS**

The Church leased office equipment under non-cancellable operating leases. Expenses related to these leases amounted to \$9,118 in 2020 and \$15,775 in 2019. The equipment was returned in 2020.

See independent auditors' report.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**

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**NOTE 12. RELATED PARTY TRANSACTIONS**

Note receivable consists of a \$150,000 promissory note from the Orthodox Church Capital Improvement Fund. The Promissory Note is dated May 21, 2018, with interest at 2.75%. The note calls for monthly interest only payments of \$344 for 59 months commencing December 20, 2018 with a balloon payment of the principal balance of \$150,000 due December 20, 2023.

**NOTE 13. CONTINGENCIES**

The Church, in the normal course of its operations, is a party to various legal proceedings and complaints, some of which are covered by insurance. While it is not feasible to predict the ultimate outcomes of such matters, management of the Church is not aware of any claims or contingencies, which are not covered by insurance that would have a material adverse effect on the Church's financial position, changes in net assets or cash flows.

**NOTE 14. CONCENTRATION OF CREDIT RISK**

The Church maintains all of its cash, cash equivalents and investments in high credit quality financial intuitions. Accounts at the institutions are either insured by the Federal Depository Insurance Corporation ("FDIC") or the Securities Investor Protection Corporation ("SIPC"). The FDIC insured limit for the years ended December 31, 2020 and 2019 was \$250,000. The SIPC insured limit for the years ended December 31, 2020 and 2019 was \$500,000. At December 31, 2020 and 2019, the Church had assets that were in excess of the insured limits.

The Church's revenues are primarily from Diocesan contributions, general supports and investment incomes.

**NOTE 15. COVID-19 PANDEMIC**

The Church's operations have been affected by the recent and ongoing outbreak of the coronavirus disease 2019 (COVID-19) which in March 2020, was declared a pandemic by the World Health Organization. The ultimate disruption which will be caused by the outbreak is uncertain; and management, at this time, cannot reasonably estimate the amount of impact it will have on the Organization's financial position, operations and cash flows. Possible areas that may be affected include, but are not limited to, disruption to the Church's special events and sponsorship and the possible decline in value of investments owned by the Church.

**NOTE 16. SUBSEQUENT EVENTS**

The Church has evaluated events and transactions that occurred through November 11, 2021, which is the date the financial statements were available to be issued, for possible disclosure and recognition in the financial statements.



# ORTHODOX CHURCH in AMERICA

## **Treasurer's Report**

Quarter End - December 31, 2021

Your Beatitude, Your Eminences, Your Graces, Reverend Fathers, brothers and sisters,

Greetings in Christ!

What follows is a set of internal financial statements that has been compiled with preliminary financial data from the full fiscal year 2021. It appears that the OCA will see a fairly significant increase in unrestricted net assets for the year -- an increase that will be important as we undertake a number of significant projects in the coming year or two.

Included in this Treasurer's Report for the period ended December 31, 2021 are the following:

- \* Statement of Operating Activity - Unrestricted
- \* Statement of Operating Activity - Restricted
- \* Comparative Balance Sheet for December 31, 2021 and December 31, 2020

December 31, 2021 represents 12/12ths of the OCA's fiscal year, so the target for operating revenues and is expenses is 100%.

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect additional adjustments.

### **Revenues**

Revenue collection was \$2,132K, including 100% of our anticipated annual endowment draw for 2021, on an annual budget of \$1,898K (112.33%). Diocesan contributions were at 107.55% and individual contributions (including the Stewards campaign) were stronger than expected.

### **Expenses**

Expenses incurred through December were \$1,548K on an annual budget of \$1,898K (81.59%). Much of our positive expense variance is due to staffing vacancies and curtailed travel, lodging, and meal expenses related to Metropolitan Council and Holy Synod meetings.

### **Net Income**

Unrestricted net income is a \$583K (including 100% of the anticipated endowment draw) surplus through the end of the year.

If you have any questions about this report, please don't hesitate to contact me at [asmith@oca.org](mailto:asmith@oca.org).

In Christ,

Andrew D. Smith  
Treasurer

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2020 - **Preliminary & Unaudited**  
December 31, 2021

				Target 100.00%	
				D	
<i>Unrestricted</i>	A	B	C	% BUDGET USED	
	<b>CURRENT QUARTER</b>	<b>YEAR TO DATE</b>	<b>ANNUAL BUDGET</b>		
1	<b>REVENUE</b>				
2	Diocesan Contributions	453,246	1,810,588	1,683,455	107.55%
3	Individual/Business Contributions	51,906	143,733	100,000	143.73%
4	Service Fees	6,313	19,913	15,000	132.75%
5	Interest Income/Realized Gains/Losses	1,045	4,174	-	
6	Appeals	-	-	-	
7	Special Events	-	-	-	
8	Other	6,461	8,057	-	
9	Release from Restriction - Endowed	-	77,622	66,000	117.61%
10	Release from Restriction - Restricted	-	68,000	33,615	
11	<b>TOTAL REVENUE</b>	<b>518,972</b>	<b>2,132,087</b>	<b>1,898,070</b>	<b>112.33%</b>
12					
13					
14					
15	<b>EXPENSES</b>				
16	Administration	106,490	368,002	376,035	97.86%
17	Executive	137,483	510,352	642,469	79.44%
18	Archives	24,995	96,885	96,044	100.88%
19	External Affairs	8,132	44,313	63,939	69.31%
20	Chapel	25	1,160	4,400	26.35%
21	Property	22,460	103,944	125,430	82.87%
22	TOC/Comm	4,632	24,786	49,186	50.39%
23	Holy Synod	27,286	46,462	66,300	70.08%
24	Metropolitan's Office	14,673	30,638	63,400	48.32%
25	Metropolitan Council	24,992	27,660	32,450	85.24%
26	St. Catherine's	12,512	57,880	65,300	88.64%
27	SOCA	-	-	-	
28	BOT	-	-	10,000	0.00%
29	Mission Planting Grants	11,333	68,000	68,000	100.00%
30	Ordination Candidacy	-	-	12,000	0.00%
31	Canons & Statutes	-	-	-	
32	ORSMA	3,915	18,158	27,611	65.76%
33	Continuing Ed	-	-	9,000	0.00%
34	Seminaries	18,000	18,000	18,000	100.00%
35	Departments	45,643	132,378	168,506	78.56%
36	<b>TOTAL EXPENSES</b>	<b>462,572</b>	<b>1,548,619</b>	<b>1,898,070</b>	<b>81.59%</b>
37					
38	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>56,400</b>	<b>583,469</b>	<b>1</b>	

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2020 - **Preliminary & Unaudited**  
December 31, 2021

	A	B	C	D
<i>Temp Restricted</i>	<b>CURRENT</b>	<b>YEAR TO</b>	<b>ANNUAL</b>	<b>Target</b>
	<b>QUARTER</b>	<b>DATE</b>	<b>BUDGET</b>	<b>100.00%</b>
				<b>% BUDGET</b>
				<b>USED</b>
1 <b>REVENUE</b>				
2 Diocesan Contributions	198,132	259,549	-	
3 Individual/Business Contributions	8,472	218,777	-	
4 Service Fees	-	-	-	
5 Interest Income/Realized Gains/Losses	(66,037)	(6,600)	-	
6 Appeals	-	-	-	
7 Special Events	-	-	-	
8 Other (incl Grants)	-	-	-	
9 <b>TOTAL REVENUE</b>	<b>140,567</b>	<b>471,727</b>	<b>-</b>	
10				
11				
12				
13 <b>EXPENSES</b>				
14 Restricted Funds				
15 All-America Council	2,628	13,630	-	
16 Charity	-	-	-	
17 Missions	-	-	-	
18 Seminary	-	-	-	
19 Endowments - Distributions & Fees	4,851	19,485	-	
20 Chapel	-	-	-	
21 Archives	-	-	-	
22 Lilly Grant	32,896	84,116	-	
23 Clergy Synaxis	6,000	19,000	-	
24 <b>TOTAL EXPENSES</b>	<b>46,375</b>	<b>136,230</b>	<b>-</b>	
25				
26 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>94,192</b>	<b>335,497</b>	<b>-</b>	

**ORTHODOX CHURCH IN AMERICA**  
Balance Sheet - FY2020 - **Preliminary & Unaudited**  
December 31, 2021

A	B	C	D
	<u>12/31/2021</u>	<u>12/31/2020</u>	<b>DIFFERENCE</b>
1 <b>ASSETS</b>			
2 Cash & Cash Equivalents - Operating	1,535,873	865,924	669,949
3 Cash & Cash Equivalents - Restricted	767,797	638,028	129,768
4 Petty Cash	426	853	(427)
5			
6 Accounts Receivable	159,979	120,996	38,982
7 Grants Receivable	-	-	-
8 Prepaid Expense	21,676	-	21,676
9 Other Current Assets	-	1,156	(1,156)
10			
11 Fixed Assets, net of depreciation	329,358	313,763	15,595
12 Investments	3,686,745	3,275,975	410,770
13			
14 <b>Total Assets</b>	<u>6,501,853</u>	<u>5,216,695</u>	<u>1,285,158</u>
15			
16			
17 <b>LIABILITIES</b>			
18 Accounts Payable	4,101	43,627	(39,525)
19 Accrued Expenses	39,750	-	39,750
20 Retirement Obligation	37,552	37,552	-
21 Unitrust Liability	94,238	106,527	(12,289)
22 Payroll Liabilities	(45)	(944)	899
23 Other Liabilities	327	-	327
24			
25 Deferred Revenue	267,812	-	267,812
26			
27 <b>Total Liabilities</b>	<u>443,735</u>	<u>186,762</u>	<u>256,974</u>
28			
29			
30 <b>NET ASSETS</b>	<u><u>6,058,118</u></u>	<u><u>5,029,934</u></u>	<u><u>1,028,184</u></u>



**ORTHODOX CHURCH IN AMERICA**

2022 Budget - Summary

For consideration at Spring 2022 Metropolitan Council meeting

	A	B	C	Target		
				100.00%		
<i>Unrestricted</i>	YTD Actual	BUDGET	% BUDGET	D	E	F
	12/31/2021	Amended 2021	USED	BUDGET	Amendments	BUDGET
				Adopted 2022		Amended 2022
<b>1 REVENUE</b>						
2 Diocesan Assessments	1,810,588	1,683,455	107.55%	1,723,271	15,949	1,739,220
3 Individual/Business Contributions	143,733	100,000	143.73%	100,000	25,000	125,000
4 Service Fees	19,913	15,000	132.75%	15,000	5,000	20,000
5 Interest Income/Realized Gains/Losses	4,174	-		-	-	-
6 Appeals	-	-		-	-	-
7 Special Events	-	-		-	-	-
8 Other	8,057	-		-	-	-
9 Release from Restriction - <i>Endowed Funds</i>	77,622	66,000	117.61%	66,000	9,000	75,000
10 Release from Restriction - <i>Restricted Funds</i>	68,000	33,615	202.29%	68,000	-	68,000
11 Use of Unrestricted Reserve				-	70,626	70,626
<b>12 TOTAL REVENUE</b>	<b>2,132,087</b>	<b>1,898,070</b>	<b>112.33%</b>	<b>1,972,271</b>	<b>125,575</b>	<b>2,097,846</b>
13						
14						
15						
<b>16 EXPENSES</b>						
17 Compensation & Benefits						
18 Administration	220,561	221,016	99.79%	228,490	-	228,490
19 Executive	445,366	586,769	75.90%	582,062	7,075	589,137
20 Archives	96,060	94,544	101.60%	102,199	-	102,199
21 External Affairs	26,229	42,439	61.80%	-	-	-
22 Property	-	-		-	-	-
23 ORSMA	6,579	24,426	26.93%	-	-	-
<b>24 Total Compensation &amp; Benefits</b>	<b>794,795</b>	<b>969,194</b>	<b>82.01%</b>	<b>912,751</b>	<b>7,075</b>	<b>919,826</b>
25						
26 Goods & Services						
27 Administration	147,441	155,019	95.11%	180,190	25,000	205,190
28 Executive	64,986	55,700	116.67%	125,385	21,000	146,385
29 Archives	825	1,500	55.00%	1,500	-	1,500
30 External Affairs	18,085	21,500	84.12%	30,000	-	30,000
31 Chapel	1,160	4,400	26.35%	4,400	-	4,400
32 Property, incl depr.	103,944	125,430	82.87%	126,730	72,500	199,230
33 TOC/Comm	24,786	49,186	50.39%	78,500	-	78,500
34 Holy Synod	46,462	66,300	70.08%	66,300	-	66,300
35 Metropolitan's Office	30,638	63,400	48.32%	68,400	-	68,400
36 Metropolitan Council	27,660	32,450	85.24%	32,450	-	32,450
37 St. Catherine's	57,880	65,300	88.64%	73,710	-	73,710
38 SOCA	-	-		-	-	-
39 BOT	-	10,000	0.00%	10,000	-	10,000
40 Mission Planting Grants	68,000	68,000	100.00%	68,000	-	68,000
41 Ordination Candidacy	-	12,000	0.00%	12,000	-	12,000
42 Canons and Statutes	-	-		-	-	-
43 ORSMA	11,580	3,185	363.57%	32,755	-	32,755
44 Continuing Ed	-	9,000	0.00%	-	-	-
45 Seminaries	18,000	18,000	100.00%	18,000	-	18,000
46 Departments	132,378	168,506	78.56%	131,200	-	131,200
<b>47 Total Goods &amp; Services</b>	<b>753,824</b>	<b>928,876</b>	<b>81.15%</b>	<b>1,059,520</b>	<b>118,500</b>	<b>1,178,020</b>
48						
<b>49 TOTAL EXPENSES</b>	<b>1,548,619</b>	<b>1,898,070</b>	<b>81.59%</b>	<b>1,972,272</b>	<b>125,575</b>	<b>2,097,847</b>
50						
<b>51 REVENUE OVER/(UNDER) EXPENSES</b>	<b>583,468</b>	<b>(0)</b>		<b>(1)</b>	<b>(0)</b>	<b>(1)</b>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-05 Administration-Salaries	164,342.00	169,221.20	-	169,221.20
10-6011-05 Administration-Payroll Expense			-	
10-6012-05 Administration-FICA/MED	12,572.16	12,945.42	-	12,945.42
10-6013-05 Administration-Unemployment Ins W/H			-	
10-6014-05 Administration-Payroll Processing Fees	4,000.00	3,000.00	-	3,000.00
10-6015-05 Administration-Health Insurance	18,084.84	20,995.56	-	20,995.56
10-6016-05 Administration-Workers Compensation/Disabil	437.82	434.90	-	434.90
10-6017-05 Administration-Pension expense	13,629.20	13,943.21	-	13,943.21
10-6018-05 Administration-Life Insurance	7,950.00	7,950.00	-	7,950.00
	<u>221,016.03</u>	<u>228,490.30</u>	<u>-</u>	<u>228,490.30</u>
10-6051-05 Charity	-	-	-	-
10-6092-05 Administration-Business Registration Fees	-	-	-	-
10-6095-05 Administration-Bank Fees	2,200.00	2,200.00	-	2,200.00
10-6096-05 Administration-Dues	1,600.00	10,000.00	-	10,000.00
10-6100-05 Administration-Office Expense			-	-
10-6105-05 Administration-Food	3,200.00	3,200.00	-	3,200.00
10-6110-05 Administration-Flowers/Candles/Liturgical item			-	
10-6210-05 Administration-Contract Services	3,000.00	-	-	-
10-6211-05 Administration-Accounting Fees	20,000.00	20,000.00	-	20,000.00
10-6214-05 Administration-Legal Fees	10,000.00	10,000.00	-	10,000.00
10-6215-05 Administration-Outside Contract Services	-	-	-	-
10-6290-05 Administration-Repairs Expense			-	
10-6502-05 Administration-Postage, Mailing Service	3,000.00	3,000.00	-	3,000.00
10-6503-05 Administration-Printing and Copying	2,000.00	3,450.00	-	3,450.00
10-6504-05 Administration-Supplies	3,000.00	3,200.00	-	3,200.00
10-6505-05 Administration-Telephone, Telecommunication:	3,000.00	-	-	-
10-6507-05 Administration-Equipment leasing	2,500.00	-	-	-
10-6511-05 Administration-Advertising Expenses	750.00	-	-	-
10-6512-05 Administration-Insurance - Liability, D and O	5,000.00	-	-	-
10-6516-05 Administration-Misc Other	-	-	-	-
10-6650-05 Administration-Stipends	11,400.00	71,400.00	-	71,400.00
10-6670-05 Administration-Computer expense	4,000.00	4,000.00	-	4,000.00
10-6671-05 Administration-Computer software			-	
10-6720-05 Administration-Telephone	4,600.00	1,200.00	-	1,200.00
10-6725-05 Administration-Mobile Phones			-	
10-6727-05 Administration-Internet	5,000.00	4,000.00	-	4,000.00
10-6733-05 Administration-Website	3,269.00	-	-	-
10-6750-05 Administration-Insurance	36,000.00	41,040.00	-	41,040.00
10-6831-05 Administration-Conference, Convention, Meetin	1,000.00	-	-	-
10-6832-05 Administration-Travel	12,000.00	-	-	-
10-6833-05 Administration-Lodging	-	-	-	-
10-6834-05 Administration-Meals	2,000.00	2,000.00	-	2,000.00
10-6900-05 Administration-Automobile			-	
10-6902-05 Administration-Auto repairs	-	-	-	-
10-6903-05 Administration-Auto gasoline	1,500.00	1,500.00	-	1,500.00
10-6910-05 Administration-Other	15,000.00	-	25,000.00	25,000.00
	<u>155,019.00</u>	<u>180,190.00</u>	<u>25,000.00</u>	<u>205,190.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-07 Executive-Salaries	467,742.72	436,225.71	6,001.40	442,227.11
10-6012-07 Executive-FICA/MED	35,782.32	33,371.27	459.11	33,830.37
10-6014-07 Executive-Payroll Processing Fees			-	
10-6015-07 Executive-Health Insurance	36,169.62	68,592.30	-	68,592.30
10-6016-07 Executive-Workers Compensation/Disability	1,994.92	2,051.57	14.40	2,065.97
10-6017-07 Executive-Pension expense	45,079.66	41,821.19	600.14	42,421.33
	<u>586,769.24</u>	<u>582,062.04</u>	<u>7,075.05</u>	<u>589,137.09</u>
10-6095-07 Executive-Bank Fees	-	-	-	-
10-6096-07 Executive-Dues				
10-6105-07 Executive-Food	-	-	-	-
10-6504-07 Executive-Supplies	500.00	3,500.00	-	3,500.00
10-6650-07 Executive-Stipends	39,000.00	75,000.00	-	75,000.00
10-6704-07 Executive-Gas	-	-	-	-
10-6720-07 Executive-Telephone	-	-	-	-
10-6725-07 Executive-Mobile Phones	5,000.00	5,000.00	-	5,000.00
10-6832-07 Executive-Travel	7,000.00	27,000.00	-	27,000.00
10-6833-07 Executive-Lodging	-	-	21,000.00	21,000.00
10-6834-07 Executive-Meals	1,200.00	1,200.00	-	1,200.00
10-6903-07 Executive-Auto gasoline	-	-	-	-
10-6910-07 Executive-Other Administrative Expense	3,000.00	13,685.00	-	13,685.00
	<u>55,700.00</u>	<u>125,385.00</u>	<u>21,000.00</u>	<u>146,385.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-08 Archives-Salaries	64,819.20	68,837.99	-	68,837.99
10-6012-08 Archives-FICA/MED	4,958.67	5,266.11	-	5,266.11
10-6013-08 Archives-Unemployment Ins W/H	-	-	-	-
10-6015-08 Archives-Health Insurance	18,084.84	20,995.56	-	20,995.56
10-6016-08 Archives-Workers Compensation/Disability	198.97	215.60	-	215.60
10-6017-08 Archives-Pension expense	6,481.92	6,883.80	-	6,883.80
	<u>94,543.60</u>	<u>102,199.06</u>	<u>-</u>	<u>102,199.06</u>
10-6092-08 Archives-Business Registration Fees	200.00	200.00	-	200.00
10-6105-08 Archives-Food	-	-	-	-
10-6280-08 Archives-Facilities and Equipment	-	-	-	-
10-6503-08 Archives-Printing and Copying	-	-	-	-
10-6504-08 Archives-Supplies	800.00	800.00	-	800.00
10-6832-08 Archives-Travel	500.00	500.00	-	500.00
	<u>1,500.00</u>	<u>1,500.00</u>	<u>-</u>	<u>1,500.00</u>

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2022 Budget - Expenses by Department

		<b>BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
		<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-09	External Affairs-Salaries	35,998.80	-	-	-
10-6012-09	External Affairs-FICA/MED	2,753.96	-	-	-
10-6013-09	External Affairs-Unemployment Ins W/H	-	-	-	-
10-6016-09	External Affairs-Workers Compensation/Disabi	86.40	-	-	-
10-6017-09	External Affairs-Pension expense	3,599.88	-	-	-
		<b>42,439.04</b>	<b>-</b>	<b>-</b>	<b>-</b>
10-6096-09	External Affairs-Dues	10,000.00	10,000.00	-	10,000.00
10-6215-09	External Affairs-Outside Contract Services		-	-	
10-6253-09	External Affairs-Program Supplies	-	-	-	
10-6504-09	External Affairs-Supplies	100.00	-	-	
10-6650-09	External Affairs-Stipends		15,000.00	-	15,000.00
10-6670-09	External Affairs-Computer expense	-	-	-	
10-6720-09	External Affairs-Telephone	1,000.00	-	-	
10-6725-09	External Affairs-Mobile Phones		-	-	
10-6831-09	External Affairs-Conference, Convention, Meetir	400.00	-	-	
10-6832-09	External Affairs-Travel	10,000.00	5,000.00	-	5,000.00
10-6834-09	External Affairs-Meals	-	-	-	
		<b>21,500.00</b>	<b>30,000.00</b>	<b>-</b>	<b>30,000.00</b>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-11 Property Support-Salaries	-	-	-	-
10-6012-11 Property Support-FICA/MED	-	-	-	-
10-6013-11 Property Support-Unemployment Ins W/H			-	
10-6015-11 Property Support-Health Insurance	-	-	-	-
10-6016-11 Property Support-Workers Compensation/Disal	-	-	-	-
10-6017-11 Property Support-Pension expense	-	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
10-6100-11 Property Support-Office expense	-	-	-	-
10-6115-11 Property Support-Office Expense - Other	-	-	-	-
10-6215-11 Property Support-Outside Contract Services	13,500.00	13,500.00	-	13,500.00
10-6273-11 Property Support-Real Estate, Personal Prop Ta	32,855.00	32,855.00	-	32,855.00
10-6280-11 Property Support-Facilities and Equipment	-	-	72,500.00	72,500.00
10-6284-11 Property Support-Equip Rental and Maintenanc	-	-	-	-
10-6285-11 Property Support-Janitorial Services			-	
10-6286-11 Property Support-Lawn	30,000.00	30,000.00	-	30,000.00
10-6287-11 Property Support-Exterminating	500.00	500.00	-	500.00
10-6288-11 Property Support-Garbage Removal	2,075.00	2,075.00	-	2,075.00
10-6290-11 Property Support-Repairs expense	1,500.00	3,000.00	-	3,000.00
10-6504-11 Property Support-Supplies	800.00	600.00	-	600.00
10-6701-11 Property Support-Heating oil	16,000.00	16,000.00	-	16,000.00
10-6703-11 Property Support-Water	200.00	200.00	-	200.00
10-6705-11 Property Support-Electricity	11,000.00	11,000.00	-	11,000.00
10-6750-11 Property Support-Insurance	-	-	-	-
10-6900-11 Property Support-Automobile	-	-	-	-
10-6901-11 Property Support-Auto insurance	-	-	-	-
10-6990-11 Property Support-Depreciation expense	17,000.00	17,000.00	-	17,000.00
	<u>125,430.00</u>	<u>126,730.00</u>	<u>72,500.00</u>	<u>199,230.00</u>

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6010-35 Sexual Misconduct Committ-Salaries	20,000.00	-	-	-
10-6012-35 Sexual Misconduct Committ-FICA/MED	1,731.96	-	-	-
10-6013-35 Sexual Misconduct Committ-Unemployment Ins	-	-	-	-
10-6015-35 Sexual Misconduct Committ-Health Insurance	2,640.00	-	-	-
10-6016-35 Sexual Misconduct Committ-Workers Compensa	54.34	-	-	-
	<u>24,426.30</u>	<u>-</u>	<u>-</u>	<u>-</u>
10-6092-35 Sexual Misconduct Committ-Business Registrati	100.00	-	-	-
10-6095-35 Sexual Misconduct Committ-Bank Fees	-	-	-	-
10-6215-35 Sexual Misconduct Committ-Outside Contract Se	2,000.00	12,000.00	-	12,000.00
10-6502-35 Sexual Misconduct Committ-Postage, Mailing Se	55.00	55.00	-	55.00
10-6504-35 Sexual Misconduct Committ-Supplies	100.00	100.00	-	100.00
10-6650-35 Sexual Misconduct Committ-Stipends		20,000.00	-	20,000.00
10-6832-35 Sexual Misconduct Committ-Travel	930.00	600.00	-	600.00
10-6834-35 Sexual Misconduct Committ-Meals	-	-	-	-
	<u>3,185.00</u>	<u>32,755.00</u>	<u>-</u>	<u>32,755.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6050-10 Chapel-Distributions				
10-6051-10 Chapel-Charity distribution	1,000.00	-	-	-
10-6105-10 Chapel-Food	800.00	1,000.00	-	1,000.00
10-6110-10 Chapel-Flowers/Candles/Liturgical item	500.00	800.00	-	800.00
10-6215-10 Chapel-Outside Contract Services	-	-	-	-
10-6504-10 Chapel-Supplies	100.00	600.00	-	600.00
10-6650-10 Chapel-Stipends	2,000.00	2,000.00	-	2,000.00
	<b>4,400.00</b>	<b>4,400.00</b>	<b>-</b>	<b>4,400.00</b>
10-6215-13 Communications-Outside Contract Services	35,000.00	35,000.00	-	35,000.00
10-6503-13 Communications-Printing and Copying	686.00	-	-	-
10-6650-13 Communications-Stipends		30,000.00	-	30,000.00
10-6670-13 Communications-Computer expense	2,500.00	2,500.00	-	2,500.00
10-6733-13 Communications-Website	11,000.00	11,000.00	-	11,000.00
	<b>49,186.00</b>	<b>78,500.00</b>	<b>-</b>	<b>78,500.00</b>
10-6105-14 Holy Synod-Food	-	-	-	-
10-6115-14 Holy Synod-Office Expense - Other	500.00	-	-	-
10-6502-14 Holy Synod-Postage, Mailing Service	-	-	-	-
10-6504-14 Holy Synod-Supplies	500.00	1,000.00	-	1,000.00
10-6650-14 Holy Synod-Stipends	14,400.00	14,400.00	-	14,400.00
10-6832-14 Holy Synod-Travel	36,000.00	36,000.00	-	36,000.00
10-6833-14 Holy Synod-Lodging	-	-	-	-
10-6834-14 Holy Synod-Meals	14,900.00	14,900.00	-	14,900.00
	<b>66,300.00</b>	<b>66,300.00</b>	<b>-</b>	<b>66,300.00</b>
10-6092-15 Metropolitan's Office-Business Registration Fee:	1,900.00	1,900.00	-	1,900.00
10-6095-15 Metropolitan's Office-Bank Fees	-	-	-	-
10-6096-15 Metropolitan's Office-Dues	-	-	-	-
10-6110-15 Metropolitan's Office-Flowers/Candles/Liturgic	1,000.00	-	-	-
10-6253-15 Metropolitan's Office-Program Supplies	-	-	-	-
10-6504-15 Metropolitan's Office-Supplies	500.00	3,500.00	-	3,500.00
10-6610-15 Metropolitan's Office-Health Insurance	-	-	-	-
10-6667-15 Metropolitan's Office-Chaplains - Stipends	6,000.00	6,000.00	-	6,000.00
10-6831-15 Metropolitan's Office-Conference, Convention, M	1,000.00	1,000.00	-	1,000.00
10-6832-15 Metropolitan's Office-Travel	47,000.00	47,000.00	-	47,000.00
10-6833-15 Metropolitan's Office-Lodging	-	-	-	-
10-6834-15 Metropolitan's Office-Meals	6,000.00	6,000.00	-	6,000.00
10-6902-15 Metropolitan's Office-Auto repairs	-	-	-	-
10-6902-15 Metropolitan's Office-Other Discretionary		3,000.00	-	3,000.00
	<b>63,400.00</b>	<b>68,400.00</b>	<b>-</b>	<b>68,400.00</b>
10-6105-16 Metropolitan Council-Food	2,400.00	2,400.00	-	2,400.00
10-6504-16 Metropolitan Council-Supplies	50.00	50.00	-	50.00
10-6832-16 Metropolitan Council-Travel	12,000.00	12,000.00	-	12,000.00
10-6833-16 Metropolitan Council-Lodging	18,000.00	18,000.00	-	18,000.00
10-6834-16 Metropolitan Council-Meals	-	-	-	-
	<b>32,450.00</b>	<b>32,450.00</b>	<b>-</b>	<b>32,450.00</b>



**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>BUDGET</b>
	<b>Amended 2021</b>	<b>2022</b>	<b>Amendments</b>	<b>Amended 2022</b>
10-6095-17 St Catherine's Representa-Bank Fees	-	-	-	-
10-6110-17 St Catherine's Representa-Flowers/Candles/Li	300.00	300.00	-	300.00
10-6253-17 St Catherine's Representa-Program Supplies	-	-	-	-
10-6650-17 St Catherine's Representa-Stipends	50,000.04	53,100.12	-	53,100.12
10-6680-17 St Catherine's Representa-Pension expense	-	5,310.00	-	5,310.00
10-6832-17 St Catherine's Representa-Travel	15,000.00	15,000.00	-	15,000.00
10-6834-17 St Catherine's Representa-Meals	-	-	-	-
	<u>65,300.04</u>	<u>73,710.12</u>	<u>-</u>	<u>73,710.12</u>
10-6502-20 SOCA-Postage, Mailing Service	-	-	-	-
10-6504-20 FOS-Supplies	-	-	-	-
10-6733-20 SOCA-Website	-	-	-	-
	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
10-6832-29 Theological Education Boa-Travel	<u>10,000.00</u>	<u>10,000.00</u>	<u>-</u>	<u>10,000.00</u>
10-6050-30 Missions and Planting Gra-Distributions	<u>68,000.00</u>	<u>68,000.00</u>	<u>-</u>	<u>68,000.00</u>
10-6215-34 Ordination Candidate Test-Outside Contract Se	<u>12,000.00</u>	<u>12,000.00</u>	<u>-</u>	<u>12,000.00</u>
10-6832-38 Canons and Statues Commit-Travel	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
10-6215-39 Strategic Planning-Outside Contract Services	-	-	-	-
10-6504-39 Strategic Planning-Supplies	1,500.00	-	-	-
10-6650-39 Strategic Planning-Stipends	7,500.00	-	-	-
	<u>9,000.00</u>	<u>-</u>	<u>-</u>	<u>-</u>
10-6050-40 Seminaries-Distributions	<u>18,000.00</u>	<u>18,000.00</u>	<u>-</u>	<u>18,000.00</u>
10-6050-80 Ministries-Distributions	34,506.00	32,000.00	-	32,000.00
10-6092-80 Ministries-Business Registration Fees	-	-	-	-
10-6096-80 Ministries-Dues	-	-	-	-
10-6215-80 Ministries-Outside Contract Services	56,000.00	11,800.00	-	11,800.00
10-6253-80 Ministries-Program Supplies	-	-	-	-
10-6503-80 Ministries-Printing and Copying	1,500.00	1,500.00	-	1,500.00
10-6504-80 Ministries-Supplies	3,000.00	3,000.00	-	3,000.00
10-6515-80 Ministries-Memberships	12,000.00	12,000.00	-	12,000.00
10-6650-80 Ministries-Stipends	42,000.00	51,400.00	-	51,400.00
10-6733-80 Ministries-Website	1,500.00	1,500.00	-	1,500.00
10-6831-80 Ministries-Conference, Convention, Meeting	3,000.00	3,000.00	-	3,000.00
10-6832-80 Ministries-Travel	15,000.00	15,000.00	-	15,000.00
10-6833-80 Ministries-Lodging	-	-	-	-
10-6834-80 Ministries-Meals	-	-	-	-
	<u>168,506.00</u>	<u>131,200.00</u>	<u>-</u>	<u>131,200.00</u>

**ORTHODOX CHURCH IN AMERICA**  
**20th All-American Council Budget to Actual**  
*Cash Basis, through 1/31/2022*

	A	B	C	D
	<b>AAC 2022 Actual</b>	<b>AAC 2022 Budget</b>	<b>Budget Remaining</b>	<b>% Budget Recognized</b>
1 <b>REVENUE</b>				
2 Diocesan Proportional Giving	259,549	300,000	40,451	86.52%
3 General Donations	-	2,000	2,000	0.00%
4 Vendor & Exhibitor Fees			-	
5 * 40 Vendors @ \$1,000	1,000	40,000	39,000	2.50%
6 * 25 Displayers @ \$250		6,250	6,250	0.00%
7 Youth Registration Fees	-	-	-	
8 * Grants			-	
9 * 120 Youth @ \$150		18,000	18,000	0.00%
10 FOCA Ad Book Revenues			-	
11 * 50 Full-page (\$150)	150	3,750	3,600	4.00%
12 * 30 Half-page (\$100)	100	1,500	1,400	6.67%
13 * 15 Quarter-page (\$75)		563	563	0.00%
14 * 5 Memorial Listings (\$60)		150	150	0.00%
15 * 10 Benefactor 2-line listing (\$40)		200	200	0.00%
16 * 10 Patrol 1-line listing (\$20)		100	100	0.00%
17 Observer Fees			-	
18 * 120 @ \$250		30,000	30,000	0.00%
19 <b>TOTAL REVENUE</b>	<b>260,799</b>	<b>402,513</b>	<b>141,713</b>	<b>64.79%</b>
20				
21				
22 <b>EXPENSES</b>				
23				
24 Flowers & Liturgical Items		500	500	0.00%
25 PCC Lunch	54	200	146	27.17%
26 Outside Contractors				
27 * Shepard Expo Services		18,500	18,500	0.00%
28 * Photographer		3,000	3,000	0.00%
29 * PSAV Services	3,590	100,000	96,410	3.59%
30				
31 Postage, Printing & Copying	116	11,500	11,384	1.01%
32 Office Supplies	1,337	8,000	6,663	16.72%
33 Stipends	10,450	18,000	7,550	58.06%
34				
35 Equipment Rental	816	8,000	7,184	10.20%
36 Travel	927	50,000	49,073	1.85%
37 Lodging		45,000	45,000	0.00%
38 Meals & Food		75,000	75,000	0.00%
39 <b>Operating Expenses</b>	<b>17,291</b>	<b>337,700</b>	<b>320,409</b>	<b>5.12%</b>
40				
41 Youth - Registration Grants				
42 Food		7,000	7,000	0.00%
43 Supplies		5,000	5,000	0.00%
44 Activity Fees		10,000	10,000	0.00%
45 Travel to Outings		5,000	5,000	0.00%
46 <b>Youth Program</b>	<b>-</b>	<b>27,000</b>	<b>27,000</b>	<b>0.00%</b>
47				
48 FOS Tours - Mexico Delegation		5,000	5,000	0.00%
49 FOS Tours - Alaska Delegation		5,000	5,000	0.00%
50 <b>Travel</b>	<b>-</b>	<b>10,000</b>	<b>10,000</b>	<b>0.00%</b>
51				
52 <b>Contingency (~7%)</b>		<b>27,813</b>	<b>27,813</b>	<b>0.00%</b>
53				
54 <b>TOTAL EXPENSES</b>	<b>17,291</b>	<b>402,513</b>	<b>385,221</b>	<b>4.30%</b>
55				
56 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>243,508</b>	<b>-</b>		

**Orthodox Church in America**

**Internal Audit Report (Final)**

Polly Walker, Chair  
Maha Adranly, Member  
Matushka Sharon Hubiak, Member

January 6, 2022

The Holy Synod of Bishops and Metropolitan Council  
Orthodox Church in America  
PO Box 675  
Syosset, NY 11791

Your Beatitude, Your Eminences, Your Graces, Brothers and Sisters in Christ:

Most Blessed Master Bless!

The Internal Audit Committee has spent the past several months performing the internal audit of the Orthodox Church in America (OCA). Once again, due to the Covid-19 pandemic the audit was performed remotely having divided the tasks among the three auditors.

In short, all areas that we looked at were in good order with some minor concerns and recommendations as follows:

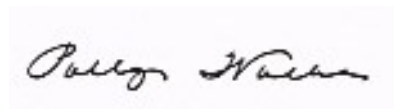
- Attention to detail in the consistent naming of the investment accounts will facilitate ease of reconciliations in the future. Four accounts should be renamed as follows:
  - L K Nimcrut to PTC 1237 L K Nimcrut
  - 1541 to PTC 946 FOS Investments Unrealized
  - 1559 to PTC 945 St Andrews Unrealized Profit & Loss
  - 1509 to PTC 945 St Andrews Cash/Cash Equivalent
- The St Andrews account PTC 945 reconciliation is off by \$2,952.76. There was an adjusting journal entry for the PTC 945 accounts shown on the file named "Investments 2021\_Q2 (corrected)" but it needs to also be reflected in the Q3 spreadsheet to allow the accounts to reconcile correctly.
- Decisions should be made on the Balance Sheet values for these Other Asset accounts:
  - The bulk of the Plant Fund was a general entry made in 2009 and then there are a few entries in 2015 for a roof, which should be investigated further.
  - Fixed Assets that are fully depreciation should be removed from the report.

- Construction in Progress is the Archives renovation. Nothing has been done other than payments for Architects and permits as the project is on hold.
  - Review the Fixed Asset accounts and clean them up in QuickBooks.
- The credit balance in the 1509 account should be cleared to a proper account. It is from a payment made (Andrew believes to the Diocese of the West) attributable to that endowment but made from our operating account. This should be investigated and accounted for correctly.
- There are existing credits on the Accounts Receivable Detail Report that should be applied to existing invoices for the Bulgarian Diocese.
- Three entities are more than ninety (90) days in arrears: Diocese of Sitka and AK, Romanian Episcopate, and the Diocese of the Midwest. Attempts should be made to collect the past due amounts otherwise they should be written off the books as bad debt if there is no reasonable possibility that they will be paid.
- There are at least five negative balances in the Accounts Payable Detail which shows that a payment has been made but no bill has been entered to correspond with these payments. The bills should be entered, and the proper payment should be applied to the bill to clear this up.
- The 2240 Retirement Obligation and 2302 Hvizd Annuity accounts are only updated at year-end. We verified that the amounts tie out to the statement from LCBA dated 01/25/21.
- A small balance is still in the Opening Balance Equity account which is used when first setting up a QuickBooks company. Susan will be taking care of this.
- The 2600-Unitrust liability reserve account is only calculated and trued-up at the end of the year using actuarial data. We verified that the amount in the ledger tied out to the Annuity Spreadsheet for 2020. We also suggest that the account name include the name of the actual Unitrust account; Kavalenko trust.
- With the Stavropegial institutions, they are separate entities and manage their own accounting. Their financials are provided annually for review, all but St Catherine's Cathedral in Moscow who provides them monthly. Both St. Vladimir's Orthodox Theological Seminary and St. Tikhon's Orthodox Theological Seminary provided Independently Audited Financial Statements. St. Vladimir's, New Skete Monasteries Inc, Nuns of New Skete and Holy Myrrhbearers Monastery are on a calendar year. We reviewed their Financial Reports for 2020. St. Tikhon's is on a Fiscal Year ending June 30<sup>th</sup>. We reviewed their Financial Reports for 2019.

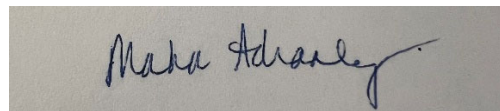
- The Unrestricted Net Assets consists of two accounts 32000 and 3100. The 32000 is the automatic account QB uses to adjust equity based on activity. Much of the fund accounting is done outside of QB in the Endowment spreadsheet. To properly account for the distinct types of restricted and unrestricted net assets separate accounts have been set up in QB to record them - permanently restricted, temporarily restricted, and a second unrestricted account 3100. Account 3100 is used to make manual journals entries to true up the accounts at year end. The external auditors provide help with these entries. Recommend that the account name for Account 3100 be modified to reflect its purpose as a true up account.
- For Travel and Entertainment Expenses we noted one transaction for \$638.90 recorded 6/29/2021 as a travel expense that did not have any details noted in QB for the Name or Description other than that it was a Debit. It also was the only transaction where the offset was not Accounts Payable or American Express but a direct debit from the 1000 TD Bank Operating Account. We recommend that all transactions include Name and Description to assist with reconciliation as well ensure validity of direct debits from the operating account.
- To provide more clarity on how the 6050 Distributions account is used we suggest modifying the name to include where the distributions initiates from i.e., 6050 Distributions - Grants & Endowments.

We would like to thank especially once again Susan Wisniewski and Andrew Smith for their promptness in replying to our requests and their great attention to detail with regards to the finances of the Orthodox Church in America.

Yours in Christ,



Polly Walker, Chair



Maha Adranly, Member



Matushka Sharon Hubiak, Member

**20<sup>th</sup> All American Council Report**  
**Metropolitan Council Spring Session 2022**  
**Deacon Peter Ilchuk**

Your Beatitude, Esteemed Members of the Metropolitan Council:

Most Blessed Master Bless!

**Introduction**

Since my last report, work continues as we get closer to the opening of the All American Council. Council Registration and Hotel Registration has officially opened and will close 30 days prior to the Council on June 18<sup>th</sup>, 2022.

**Preconciliar Commission**

The Preconciliar Commission met last Friday to continue its work with the overall planning of the Council. It reviewed a number of items that included Council Registration Processes and Progress. To date, about 90 persons have registered for the council with about 50% of that number being delegates and the other being observers.

The received an update from the hotel in terms of the room pickup pace, which is on the same traditional pace as previous councils. At this time, 33% of our room block is booked. They also provided an update with their current Covid Protocols and procedures. The hotel is currently requiring masks in all public spaces. They are not requiring proof of vaccination at this point. They also have procedures in place should a positive case become known. At the time of the council in July, it is expected that we will follow all current covid protocols in place with the hotel at that time.

The group also reviewed the overall agenda, which is attached to this report, as a draft form only. As we get closer to the Council, the Commission will continue to make adjustments to the agenda as needed. The PCC will publish the final agenda, with the approval of the Metropolitan Council and Holy Synod, 60 days prior to the Council, by May 18<sup>th</sup> 2022, per the OCA Statute.

The group also received an update from the Local Committee, which will be completing a lot of their work in the coming months. Under the direction of Fr. Ted Boback and Lisa Mikhalevsky, the committees are active and ready to complete the tasks needed to be done.

The youth program is currently finalizing the registration process and overall curriculum and should be published in the coming weeks. The cost per participant will be \$200. The range of participants will be from grades K-12. Fr. Benjamin Tucci and his team will once again be in charge of program and are hoping for another successful event like in St. Louis.

Andrew Smith provided an update on the Council Budget with about 85% of the assessments received for funding the council. Some other income has also come in from exhibitors and participants that are subject to the fees set by the Preconciliar Commission.

While we do anticipate some increase costs to the Youth Program, the increase in the participant fees and potential for sponsorship opportunities should assist in offsetting some of the increase, we should still be on budget for the Council.

### **Mandated Timeline (Per Statute)**

- Official All-American Council Agenda to be approved by the Holy Synod and Metropolitan Council at the 2022 Spring Sessions (February – March 2022)
- Proposed Statue Revisions 90 days prior (April 18th, 2022)
- PCC to publish agenda, notices, and arrangements 60 days prior (May 18th, 2022)
- Chancery to publish credentials and certification 30 days prior (June 18th, 2022)
- Council reports to be posted by Chancery 30 days prior (June 18th, 2022)
- All Statue changes or amendments, resolutions, etc. to be posted 30 days prior (June 18th, 2022)

### **General Timeline for AAC**

- Hotel Registration, Council Registration, Youth Program Registration opens during the first week of January 2022.
- Hotel Reservations Cut-Off date will be Friday, June 24th, 2022.
- Council Registration and Youth Program Registration Cut-Off date will be 30 days prior, which is Saturday, June 18th, 2022.
- Chancery Team and Local Staff will arrive on Friday, July 15th, 2022 to begin setup and load-in.
- The 95th FOCA National Convention will take place Friday, July 15th – Monday, July 18th, 2022.
- Great Vespers will be served at the hotel on Saturday, Hierarchical Liturgy will be served at the hotel on Sunday. FOCA Clergy and Local Clergy to concelebrate.
- Council will begin Monday evening and finish by 1pm on Friday. Tear down and load-out will take place throughout the afternoon and evening.

## **Conclusion**

I would like to extend my gratitude to His Beatitude Metropolitan Tikhon, and the members of the Metropolitan Council for your continued prayers, guidance, and support in my role as our Council Manager. I think we will have a great opportunity to gather as a Church again and renew our vision for the Orthodox Church in America.

Respectfully Submitted,

Dn. Peter Ilchuk, Council Manager



## Report of the Project Manager of the Departments of the Orthodox Church in America to the Combined Holy Synod and Metropolitan Council

Archpriest Thomas Soroka

February 2, 2021

Your Beatitude, Members of the Holy Synod and Metropolitan Council,  
As a follow-up to my report given in mid-October of 2021, I will update you on the progress and production of the various departments. Please note that only four months have passed since the last report.

I will conclude my report with some challenges

Project status will be either completed, ongoing, or pending.

### Department of Liturgical Music and Translations

*Note: Productive meetings have been held with St Vladimir's Seminary and St Tikhon's Seminary regarding areas of cooperation and concern.*

*Phillip Ritchey, Project Lead*

- **ONGOING:** Compilation of all available resources and texts that have been used in the past and present under the "Texts for Liturgical Services" section provided in the helpful, but labor-intensive, individual service sheets published on the OCA website. He will be compiling all current texts into a usable online Horologion, Triodion, Pentecostarion, Menaion, Psalter, and other possible resources that we currently possess.
- **ONGOING:** Expansion of Thee/Thou music for the Ochtoechos and Menaion
- **ONGOING:** Creation of complete rubrical notes for upcoming Divine Services. The current focus is on the Saturday night/Sunday cycle, but plans include expanding to include other commonly served services for the Great and Vigil-ranked feasts.
- **NEWONGOING:** Posting of basic music for Matins and Vespers.

*Vladimir Morosan, Project Lead*

- **ONGOING:** Basic Sight-Singing and Ear-Training Course for choir directors and singers who may be unfamiliar with basic musical concepts. (*This is the third round for this popular program.*)
- **ONGOING:** Basic Conducting Course which is being held online. This is revamped from the previous course held by David Drillock.

*Dn Anthony Stokes*

- PENDING (Feb 12): Free webinars to prepare church musicians for the Vespers and Matins services. Webinars will be archived on YouTube.

*Fr Gregory Ealy, Project Lead*

- PENDING: An interactive course on Music Editing using Finale according to OCA standards. This will enable us to have other talented music editors who could contribute to the volumes of music that are needed to supply parish choirs.

## **Department of Evangelization**

*Fr Thomas Soroka, Project Lead*

- **ONGOING:** Launch, review, and awarding of 2022 Mission Planting Grant Program. Ongoing maintenance of program and coaching of mission parishes and priests.

*Melissa Graff, Project Lead*

- **ONGOING:** Revision and redesigning of the late Fr John Matusiak's "Tract series" which was sold through OCPC and later acquired by St Vladimir's Seminary Bookstore. Approximately 50 attractive trifold and bifold tracts, professionally designed, will be made freely available for download and use in parishes. (Most completed and posted. This effort is being expanded to include tracts on the major feasts and other important topics.)

*Unassigned*

- PENDING: Online live seminars on apologetics.

*Unassigned*

- PENDING: A compilation of currently available educational and liturgical resources in the Spanish language and the creation of new resources as needed.

## **Department of Continuing Education**

*Fr Ian Pac-Urar, Project Lead/Chairperson*

- **ONGOING:** Production of monthly one-hour online seminars or educational forums on a variety of topics relevant to clergy and church workers for 2022. (This is a continuation of the 2021 series of webinars.)

## **Department of Christian Service and Humanitarian Aid**

*Donna Karabin and Diana Pasca, Project Leads*

- **NEWONGOING:** Additional articles for Parish Ministry Resources.
- PENDING: Four live approximately one-hour long webinars on the topics based on "Compassion in Action" with guest speakers to address the topics.

## **Department of Youth, Young Adult, and Campus Ministry**

*Fr David Subu, Project Lead*

- **NEWONGOING:** Coordination of the annual Orthodox Youth Workers Conference, held yearly at the end of January, which is planned for early February 2022 at Antiochian Villiage.
- **NEWONGOING:** Coordination of the OCA's participation in the Assembly of Bishops "Year of Youth" initiative. Fr David will be the project coordinator for a series of webinars.
- **PENDING:** Resource creation for use in parishes to engage youth at various levels.

*Fr Ronald Tucci, Project Lead*

- **PENDING:** Coordination and management of all youth activities of the 2022 All-American Council including a Bible Bowl-type competition.

## **Department of Christian Education**

*Unassigned Project Lead*

- **ONGOING:** Coordination of efforts with the GOA and Antiochian Christian Education leads. (*Fr Thomas Soroka is currently meeting with this group.*)

*Valerie Zahirsky, Project Lead*

- **ONGOING:** Submission of various articles supporting Christian Education in homes and parishes.
- **PENDING:** Completion of a sixth volume of Saints activity book for children as an online resource.

*Eileen Mountain and Kathy Boraas*

- **ONGOING:** Development of new six-lesson FOCUS units on the post-Resurrection/Acts of the Apostles work of the church.

*Kelly Potteiger*

- **ONGOING:** Development of new Vacation Church School units that can also be used as stand-alone lessons.

In addition to these ongoing projects, I continue to coordinate the Catechism Project which is ongoing. Our goal is to have it ready for publication to be released at the All American Council in July, 2022. The text will be made freely available to anyone for download and will be an ongoing work of refinement.

I have also assisted in facilitating online interviews with His Beatitude for various topics and announcements. I continue to be available to promote the work of the Orthodox Church in America through independent channels and through my official work with Ancient Faith Radio.

I would once again like to request input from the members of the Metropolitan Council and the Holy Synod regarding the possible goals and ongoing structure of the Departments. We are grateful for any input which gives tangible goals supporting the growth of parishes and institutions within the Orthodox Church in America.

I am happy to answer any questions you may have.

Respectfully submitted,

Archpriest Thomas Soroka

As a reminder, the structure of the Departments has been revised to facilitate and motivate production. This structure is flexible and may be revised according to need.

#### **Structure of the Departments:**

The former position of individual Department Chair has been eliminated and has been replaced by one overall Departments Project Manager. The Project Manager reports directly to the Chancellor to enact the vision of the Metropolitan and Holy Synod for the benefit of parishes, missions, and institutions.

The **Project Manager** has the following responsibilities:

- manages the activities of the departments
- conceives the goals of projects, resources and activities which support parishes, missions, and institutions
- works within the constraint of budgets while assisting in fundraising for future growth
- seeks out qualified Project Leads who complete assigned projects
- ensures that agreed-upon stipends are submitted for payment
- reports on the progress of the departments to the Chancellor

The **Project Lead** has the following responsibilities:

- works with the Project manager to agree upon the production of specific projects, resources and/or activities
- completes projects within established timelines
- seeks out assistance from others when agreed upon by the Project Manager
- works within the policies of the Orthodox Church in America
- communicates with the Project Manager regarding progress of projects, resolving roadblocks, and executing completed assignments

**Consultants** have the following responsibilities:

- recognized as experts in a particular departmental field
- may advise the Project Manager or Project Leads
- may or may not be actively working on projects

# Office of Pastoral Life

## Synaxis Program

The Synaxis Program - organized by the Office of Pastoral Life - is hosted by His Grace, Bishop Alexis. Promoting clergy health and well-being is an important goal for the Office of Pastoral Life. Early in 2021, the Metropolitan Council approved funding to sponsor and expand the Synaxis program. This includes using trained clergymen to serve as facilitators for small group breakout rooms at quarterly synaxis gatherings. These gatherings use the model of peer learning and are held through an online platform.

The broad objectives of the program:

1. Clergy will find greater resilience in preserving the joy of ministry and leadership during stressful transitions, and share that joy with peers in a community of mutual trust.
2. Clergy will utilize confidential spaces where they are able to reflect upon ideas, struggles, and knowledge regarding their ministry.
3. Clergy will be prepared and willing to take greater agency in ongoing formation of their priestly ministry and personal spiritual, emotional, and physical health.

Since the Fall report to the Metropolitan Council, one (1) Synaxis gathering has taken place bring the total number of four (4) gatherings in 2021 since funding began. On December 14, 2021. His Grace, Bishop GERASIM was the invited speaker to open the Synaxis, with 57 priests and deacons attending. Eighty percent of registered participants attended, up from 66% in the September gathering. His Grace spoke about how he finds joy in the liturgical life of the Church. When participants were asked in an exit survey at this gathering: Through this Synaxis I have found points of joy in my ministry – 92% of participants strongly agreed or agreed.

In May, the Synaxis Program sent a survey via Mail Chimp to 785 clergy of the OCA asking questions and seeking feedback from previous Synaxis gatherings. 415 (53%) of recipients opened the email; 102 of opened emails (25%) responded to the survey. Here's a sample of the findings.

Those who answered the survey were asked "I would be willing to share my thoughts and concerns about Clergy Peer Learning with the Office of Pastoral Life." Those who did not attend were asked "I'd be willing to invest time meeting with an organizer for further discussion." Thirty two respondents who did not attend the March Synaxis said they would be willing to discuss events with an organizer. Eleven people who did attend the March Synaxis said they would be willing to share their thoughts.

In August 2021, the Office began conducting interview to gather deeper qualitative data about participant reaction to the Synaxis and the Office of Pastoral Life. The interview process was broken into two rounds. In the first round, the organizers (Father Nicholas Solak, Father Sergius Halvorsen, and Deacon Jacob Frimenko) each interviewed two Synaxis Facilitators. [Initially seven facilitators were interviewed, but two declined to become interviewers. Their reports are included in the dataset]. After their own interviews and additional training, these six clergymen became the interviewers for round two. The round one and two interviews are combined without distinction in the dataset.

The Office of Pastoral life secretary then compiled the lists of the people who responded to the May survey that they would like to be contacted, and assigned them a number. Each interviewer was assigned two people who had not attended the Synaxis, and one who had. Care was taken that interviewees were chosen to represent each geographic region of the Orthodox Church in America. While years of ministry

were recorded for each participant, this was not a determining factor in their being chosen as an interviewee.

The exception to this process was the deacons. One of the facilitators who is a deacon interviewed the other deacons. Only two deacons responded to the initial survey that they would like to be contacted, and only one of those agreed to be interviewed. Other deacons who had attended the Synaxis were then invited to be interviewed. One said yes.

In total, 36 clergymen were asked if they would like to be interviewed. Twenty-one consented and the interviews were completed. Eight did not respond when an interviewer reached out to them. Three responded but declined to be interviewed. There is no data for four of the invited interviewees.

Interviewers completed reports based on a given template, then emailed the reports to Father Nicholas Solak and Shelby Giokas. Shelby compiled the documents, and passed them to Deacon Jacob for data analysis. Deacon Jacob has built a comprehensive presentation about the data and his analysis process. It has been requested that his presentation be given at the February 2022 Metropolitan Council Meeting.

The next Synaxis gathering is tentatively scheduled for Tuesday, March 22, 2022 at 2pm EST.

## **Thriving in Ministry**

The Orthodox Church in America's Thriving in Ministry program is a clergy and clergy wives peer learning program. It is supported by a grant from the Lilly Endowment. The program seeks to be pan-Orthodox including parish priests and parish priest wives from multiple Orthodox jurisdictions with parish ministries in North America. The program aims to create and support in-person peer learning groups organized geographically that allow priests and priest wives to gather quarterly for full day peer learning encounters.

The program entered 2020 with nine active groups which placed the program slightly ahead of the overall schedule of having seven active groups by the beginning of 2020. In spite of the 2020 pandemic, the year ended with fourteen active groups and one group in suspended activity until in-person meetings were possible.

Two-thirds of our program participants come from the Orthodox Church in America and the other third come from the Greek Orthodox Archdiocese, the Moscow Patriarchate, the Antiochian Archdiocese, the Serbian Archdiocese, and the Romanian Archdiocese. In similar manner, about two-thirds of our active facilitators come from the Orthodox Church in America and the other third come from the Greek Orthodox and Antiochian Archdioceses. This diversity is a good strength of our program.

The first week of February is the national Thriving in Ministry gathering, - Father Nicholas Solak and Shelby Giokas will be attending. The conference is being held virtually for the second year in a row. This gathering will provide support for project leaders, insight into other denominations' projects, and information about the end of year report and grant renewal. The current grant expires December 31, 2023.

Moving forward into the third year of our grant, we will continue to return to in-person peer learning as possible. Some groups established in 2020 and 2021 will continue as virtual groups as they were conceived and organized along broad geographical lines making in-person gatherings not financially

possible. This development was seen even before the onset of the pandemic as an inevitable part of the TiM program as geographical challenges make in-person peer learning difficult in many places across the United States, (including especially Alaska) Canada, and Mexico. The COVID-19 pandemic accelerated that development for us. We will support the return to in-person peer learning, continue to nurture our virtual peer learning groups, and help newly forming groups discern the best format for them to pursue.

We expect our growth to be strong in the coming year and to begin evaluating the impact, quality, and efficacy of our work. It is expected that as the coming year moves along, more in person church meetings and gathering will take place affording the opportunity for the TiM program to talk more broadly about the lessons we've learned, the challenges we are confronting, and the possibilities that lie before us.

In Christ,  
Father Nicholas J Solak



Feb 3, 2022.

Your Beatitude and esteemed members of Metropolitan Council,

Most blessed master, bless!

Since my last report I have worked closely with Fr Alexander Rentel, Fr Alessandro Margheritino, and Matushka Jessica Fuhrman to increase the online presence of His Beatitude Metropolitan Tikhon and the Orthodox Church in America.

We now have daily posts on the OCA's social media channels: Facebook, Twitter, Instagram, and Telegram. We have started by posting daily lives of the saints and adding other content to that baseline such as notable anniversaries, new resources available on the website, news items, and other events.

Recently we engaged Alexis Liberovsky, OCA Archivist, to write articles approximately once per month. These articles highlight important events and persons in the history of the Orthodox Church in America. They are released on an important anniversary when possible.

When we made these social media changes we saw changes in our metrics:

- Facebook: Engagement up 210%. Unique views up 51%. Audience increase of 71%.
- Instagram: Engagement up 148.4%. Unique views up 261.5% Audience increase of 100.0%.
- Twitter: Engagement up 77.4%. No data for unique views. Audience increase of 100.0%.

These numbers are encouraging however some caution should be exercised with them. Proportionally the numbers are high however in terms of actual new audience members the increase is modest by social media standards. Fresh, quality, and engaging content will be important to add to our daily posts in order to prevent a plateau. However, it is a good first step towards a more robust social media strategy.

Going forward I will be monitoring the metrics to further refine our social media strategy as we get feedback and learn what resonates with our audience and what does not. Our main bottleneck is quality content to post so it will be important to engage other writers, professors, and departments to highlight the work of His Beatitude and wider Orthodox Church in America initiatives.

Yours in Christ,  
Priest Kyle Parrott

*Report submitted at the Fall 2021 Session of the Metropolitan Council*



Pension Office  
P.O. Box 8121  
Hicksville, NY 11802-8121  
Tel/Text: 516-464-0322  
Fax: 516-464-0367  
Email: [pension@ocapension.org](mailto:pension@ocapension.org)

October 19<sup>th</sup> 2021

Your Beatitude, Your Eminences, Your Graces, honorable clergy, and lay delegates:

On behalf of the OCA Pension Board, I take this opportunity to update you on the status of the Pension Plan as of September 30, 2021. The net time-weighted return on core investments managed by Morgan Stanley year to date was 7.59% compared to our benchmark of 6.31%. The net time-weighted annualized return for the period September 30, 2016 to September 30, 2021 on investments managed by Morgan Stanley was 9.26 % compared to our benchmark of 9.02%. 2021 thus far has been a strong year in terms of U.S. stock market performance while less so for international and emerging financial markets reflecting respective recovering economies while continuing to deal with the ongoing impact of Covid-19 and the delta variant. The ending market value of plan assets on September 30, 2021 was \$27,993,076 as compared to \$26,689,268 on December 31, 2020.

The Pension Board would like to thank the OCA Pension committees for their diligent work and are grateful for their support of the Orthodox Church in America Pension Plan.

With regard to participation in the Pension Plan, there are currently 352 active participating members and 41 inactive members for a total of 393 active/inactive participants. In addition, there are currently 206 monthly benefits recipients.

Respectfully Submitted,

Priest Gleb McFatter, Chairman



Pension Office  
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Hicksville, NY 11802-8121  
Tel/Text: 516-464-0322  
Fax: 516-464-0367  
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February 10<sup>th</sup> 2022

Your Beatitude, Your Eminences, Your Graces, honorable clergy, and lay delegates:

We are pleased to report that 2021 was a good year for the Plan. Participation remains strong, investment performance was good, and administration has continued to implement processes to improve responsiveness to Members.

During 2021, two special committees were organized---one by the Metropolitan and another by the Metropolitan Council---to review the operation of the Plan. Each group reviewed investment performance, projected financial operations of the Plan, and whether alternative retirement vehicles should be considered. With near unanimous agreement, both committees concluded that the Pension Plan served an important interest of the OCA community and that while the Plan should be better funded, there was no immediate concern that the Plan could not pay promised benefits when due. Given the long-term over which a pension program operates, both Committees recognized and noted a concern that without raising the funding rate and continued good financial experience, there were financial risks in later years.

As this report is being prepared, the Pension Board has been requested to cooperate in a further review of the Plan. Specifically, the Pension Board has been informed that the Metropolitan Council is engaging Cheiron, a respected actuarial firm, to review the actuarial work on which the Pension Board and OCA relies in evaluating the financial health of the Plan and the adequacy of the contribution rate.<sup>1</sup> The Pension Board leadership participated in the kick-off call and agreed that subject to customary agreements to protect the privacy rights of Plan Members and work-product of the Plan's actuaries, full cooperation would be given. As this will be a third review, the Pension Board has asked the OCA to confirm that the additional costs for the Board's actuary and counsel to provide requested information will be covered by the OCA.<sup>2</sup> As fiduciaries, the Pension Board is bound to hold Plan assets for the purpose of providing benefits. While assets can be used for reasonable expenses, the Pension Board has concern that any use of Plan assets for a third review, in addition to its regular ongoing administrative expenses, would fall into a grey zone that might be questioned. The Pension Board

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<sup>1</sup> The Pension Board notes that Cheiron was the only actuarial firm to respond to the OCA's request for proposal for the review services. This raises a question concerning the RFP process and why other firms declined responding.

<sup>2</sup> The Pension Board incurred expenses of more than \$35,000 in responding to the two earlier reviews. Requests have been made for reimbursement from the OCA, to date the OCA has not provided additional contributions to the Plan to cover these expenses.

believes that payment for the Cheiron review, which is primarily a review by the OCA in its “settlor” capacity should be paid by the OCA.<sup>3</sup>

### **Investment Performance as of December 31<sup>st</sup> 2021:**

The net time-weighted return on core investments managed by Morgan Stanley for calendar year 2021 was 11.68% compared to our assumed actuarial rate of 7% and benchmark of 10.39%<sup>4</sup>. The net time-weighted annualized return for the period September 30, 2016 to December 31, 2021 on investments managed by Morgan Stanley was 9.57% compared to our benchmark of 9.35%. This past calendar year, 2021, was a strong year in terms of U.S. stock market performance and less so for international and emerging financial markets. Fixed Income markets are suffering from the ending of stimulus and anticipated rate increases by the Federal Reserve. The ending market value of plan assets on December 31, 2021 (after paying retirement benefits of slightly over \$3.9 million) was \$28,656,920 as compared to \$26,689,268 on December 31, 2020.<sup>5</sup>

### **Participation:**

There are currently 350 active participating members and 39 inactive members for a total of 389 active/inactive participants. In addition, there are currently 220 monthly benefits recipients.

### **Administration:**

During 2021, the administrative office implemented an online portal for parish and institutions to enter the monthly contributions and with reporting features. The administrative office also has been busy working to implement an automated system to enable the quick determination of the accrued benefits for Members upon a Member’s request. When fully operational, the administrative office will be able to respond to a Member upon his or her initial call. In addition, the administration is working on a Member’s website portal. This website is being designed to help you understand the current value of your retirement benefits, review your personal information, view, and save correspondence from the OCA Pension Plan, and contact and securely upload documents to the OCA Pension Plan.

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<sup>3</sup> The Pension Board will necessarily incur expense to assure that information is properly transmitted and interpreted. For example, the Pension Board notes that the description of the Plan in the draft financial statement discussed in the Fall 2021 meeting of the Metropolitan Council does not accurately describe the plan. The Plan is not a multiemployer plan, which is a technical term used to refer to a plan that is a collectively bargained plan maintained by more than one employer, usually within the same or related industries, and a labor union.

<sup>4</sup> The benchmark rate is the rate that would have been earned if each manager achieved investment returns equal to its asset class index return. In our portfolio, each manager is engaged to manage in accordance with a particular style and to achieve at least the index return. For example, a manager hired to achieve a return equal to the S&P 500, would be measured by how it performed compared to the S&P 500 index. In the aggregate, our managers achieved a return exceeding the benchmark return for the entire portfolio.

<sup>5</sup> During calendar year 2021, contributions received from all sources was \$3,179,964.

## **Noise About Plan Performance**

Finally, we would be remiss not to address the noise about the pension plan and the criticism of efforts in the wake of the financial crisis of 2008 and 2009 to manage investment risk by engaging in a hedging strategy that resulted in a drag on earnings while the strategy was in place. For the record, the Plan had positive investment results in all those years while the hedging strategy was used even though the strategy placed a drag on earnings. We hope this will be the final time we address criticism about the efforts of the Pension Board to limit investment losses in the wake of the 2008-2009 market downturn. It is nothing more than a distraction

The Pension Board adopted a hedging strategy managed by Milliman Financial Risk Management LLC<sup>6</sup>---referred to as the Milliman Managed Risk Strategy<sup>TM</sup>---that placed financial hedges on the portfolio when the markets dropped by a set amount. The hedges would be removed as the markets recovered. In the pre-2008 times, these market movements generally occurred over sufficient time that the strategy resulted in minimizing market losses even after taking the costs of placing the hedges. In the post-2009 markets, these market movements occurred much more rapidly (known as volatility) with the result that the strategy proved to be a drag on earnings. The market value loss compared to what might have been earned had the strategy not been utilized has been estimated in the \$3 million dollar range. This cost needs to be viewed against the fear of suffering larger losses in the wake of the 2008-2009 downturn without an expectation that the OCA community would be in a position to make offsetting contributions and the fact that the Plan still achieved positive returns.

Another factor that needs to be taken into account is that those most vocal in criticism do not favor a defined benefit plan for retirement and do not participate in the Plan. They do not participate despite the mandate of the Fourth All-American Council. Perhaps they criticize the Plan because they wish to justify their disregard of the longstanding mandate that all clergy participate in the Plan. In any event, they do not propose an alternative retirement program that would honor existing promises and provide additional benefits for future service. They do not address providing for the well-being of clergy and those who support the Church in retirement. It is generally recognized that most of the OCA clergy are not highly compensated and do not have other means to fund their retirement. Perhaps that does not matter; however, that has not been the sense of the OCA community.

## **Conclusion**

It is our privilege to serve the Plan's Members. While the OCA may reconsider whether a defined benefit pension for clergy and full-time workers who serve our community is the better way to provide some financial security in retirement, we hope you agree that

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<sup>6</sup> Milliman Financial Risk Management LLC is part of MILLIMAN, an independent risk management, and technology firm. Another Milliman company, Milliman, Inc, has provided actuarial services since the early 1990's.

the Plan is operating responsibly and deserves the continuing financial support of our OCA community.

Respectfully yours in Christ,

The Pension Board

# Metropolitan Council

*As of February 1, 2022*

His Beatitude Metropolitan Tikhon

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