



**ORTHODOX  
CHURCH in  
AMERICA**

**Metropolitan Council Meeting**

**Spring 2019**

**Reports**



## Meeting of the Metropolitan Council February 13 to February 15, 2019 Reports

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23.	Department of Continuing Education	Archpriest Ian Pac-Urar
24.	Department of Evangelization	Archpriest John Parker

- |     |                                      |                             |
|-----|--------------------------------------|-----------------------------|
| 25. | Department of Music                  | Dr. David Drillock          |
| 26. | Department of Youth and Young Adults | Archpriest Christopher Rowe |
| 27. | Office of Institutional Chaplains    | Archpriest Steven Voytovich |
| 28. | Office of Military Chaplains         | Archpriest Theodore Boback  |
| 29. | FOCA                                 | Allison Steffaro            |



**Meeting of the Metropolitan Council  
February 13 to February 15, 2019**

**Metropolitan Council Agenda**

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

**Tuesday, February 12**

***Arrival and Committees***

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
All Day	Transport	Airports	Chancery Staff

Dinner will be available at 5:30 PM at the Seminary

*If any committees would like to meet this evening, they are free to schedule it themselves*

**Wednesday, February 13**

***Metropolitan Council***

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
8:00 AM	Breakfast	ICS	ICS Staff
9:00 AM	Metropolitan Council		
	A. Opening Prayer		Metropolitan Tikhon
	B. Agenda: Introduction		Fr. Alexander Rentel
	C. Roll Call/Approval of Minutes		Fr. Eric G. Tosi
	D. Welcome - New Members		Metropolitan Tikhon
	E. Metropolitan's Report		Metropolitan Tikhon
	F. Secretary's Report - Personnel File Policy - IT/Communication/Website Report - Archives Renovation Report - 20 <sup>th</sup> AAC Report		Fr Eric G. Tosi    Alex Liberovsky
12:00 PM	Lunch	ICS	ICS
1:00 PM	G. Legal Report - Ongoing Legal Issues		E.R. Lanier

	H.	Metropolitan Council Committees		
		1. Reorganization Committee		Fr. Timothy Hojnicky
		2. Committees Reports		If needed
		3. MC Reorganization		Metropolitan Tikhon
	I.	External Affairs		Fr. Leonid Kishkovsky
	J.	SOCA Report		ADN Joseph Matusiak
5:00 PM	Dinner		ICS	ICS
7:00 PM	New Member Orientation			E.R. Lanier

**Thursday, February 14**  
***Metropolitan Council***

8:00 AM		Divine Liturgy	St. Sergius	Metropolitan Tikhon
9:30 AM		Breakfast	Chancery	Chancery
11:00 AM		Metropolitan Council	ICS	
	K.	Pension Board Report		Matushka Mary Breton
12:30 PM	Lunch		ICS	ICS
1:30 PM		Metropolitan Council	ICS	
	L.	Chancellor's Report - ORSMA - SMPAC		Fr. Alexander Rentel Cindy Heise
	M.	Clergy Wives Survey		Cindy Heise
	N.	Treasurer's Report - YTD Finances - External Auditors		Melanie Ringa
	O.	Report of Finance/Investment Committee		Fr. John Dresko
	P.	Thriving in Ministry Presentation		Fr. Solak/Fr. Whitfield
4:00 PM	Q.	Open Discussion		Metropolitan Tikhon
5:30 PM	Dinner		ICS	ICS
7:00 PM	R.	Standing Synod/Committee Meetings		ICS

**Friday, February 15**  
**Metropolitan Council**

8:00 AM	Breakfast	ICS	ICS
9:00 AM	Metropolitan Council	ICS	
	S.	Strategic Planning Session - Prioritizing major goals and processes	Metropolitan Tikhon
	T.	Other Business/Committee Meeting Issues	
12:00 PM	Lunch	ICS	ICS

Departures

*Transportation to the airports all day.*



**MINUTES  
of the Joint Meeting of the Standing Synod  
and the 2018 Fall Session of  
the Metropolitan Council**

**Wednesday, September 19 – Friday, September 21, 2018  
Immaculate Conception Seminary, Huntington, NY**

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

**PARTICIPANTS**

**STANDING SYNOD**

His Beatitude, Metropolitan Tikhon  
His Eminence, Archbishop Michael

His Eminence, Archbishop Benjamin  
His Grace, Bishop Paul (*except Friday*)

**METROPOLITAN COUNCIL**

**CHURCH OFFICERS**

Archpriest John Jillions, *Chancellor*  
(*except Wednesday afternoon*)  
Melanie Ringa, *Treasurer*

Archpriest Eric Tosi, *Secretary*

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

Archpriest Antonio Perdomo  
Archpriest Thomas Moore  
Archpriest Kirill Sokolov (*except Friday*)

Katherine Vitko  
Lynnell Brunswig  
Mark Linnehan

**DIOCESAN REPRESENTATIVES**

**Diocese of Alaska**

Archpriest John Dunlop

Patrick Pletnikoff

**Albanian Archdiocese**

Archpriest Dennis Rhodes

Donna Dimitri (*except Thursday afternoon  
& Friday*)

**Bulgarian Diocese**

Priest Gabriel Bilas

Bogdan Popescu

**Archdiocese of Canada**

Protodeacon Jesse Isaac

Mark Petasky

**Diocese of Eastern Pennsylvania**

Archpriest Timothy Hojnicky

Susan Schlasta (*except Friday*)

**Diocese of the Midwest**

Archpriest Alexander Kuchta

Robert Graban

**Diocese of New England**

Priest James Parnell

Michael Danchak

**Diocese of New York/New Jersey**

Archimandrite Joseph (Hoffman)

**Diocese of the South**

Priest Joseph Ciarciaglino

Christopher Lewis

**Diocese of Washington**

Archpriest Valery Shemchuk

Elizabeth Mikhalevsky

**Diocese of the West**

Archpriest John Dresko

David Lane, Esq.

**Diocese of Western Pennsylvania**

Priest Nikolai Breckenridge

**ABSENT**

James P. Kornafel (*Diocese of New York/New Jersey*)

Dr. John Schultz (*Diocese of Western Pennsylvania*)

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

His Grace, Bishop Daniel of Santa Rosa (*except Thursday afternoon & Friday*)

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

*– Thursday afternoon*)

Priest Gleb McFatter (*Pension Board Chairman - Friday by conference call*)

Archdeacon Joseph Matusiak (*Secretary to the Metropolitan & Director, Stewards of the OCA*)

*– Wednesday morning & Thursday morning*)

Maureen Ahearn (*OCA Pension Plan Administrator – Friday*)

Judge E.R. Lanier (*OCA General Counsel*)

Alexis Liberovsky (*Recording Secretary*)

**WEDNESDAY, SEPTEMBER 19, 2018**

Following the celebration of a Divine Liturgy at Saint Sergius Chapel at 8:00 AM, Metropolitan Tikhon opened the meeting with prayer at 11:04 AM on Wednesday morning at the Immaculate Conception Seminary.

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

Father John Jillions introduced the agenda and indicated that the presentation of his report has been moved to Thursday morning. Father Eric Tosi provided further clarifications to the agenda.

**A.1. MOTION MIKHALEVSKY/GRABAN - To approve the agenda for this meeting as amended. CARRIED.**

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

Fr. Tosi then conducted the roll call, announced guests who would be present at various points during this meeting (see participants list), and noted the absence of several members due to illness in their families. He



requested approval of Alexis Liberovsky as recording secretary for the meeting, which was accepted without objection. Fr. Tosi then presented the draft minutes of the previous meeting of the Metropolitan Council on February 6-8, 2018 for approval.

**B.1. MOTION VITKO/DANCHAK -- To accept the previous meeting minutes of February 6-8, 2018 as presented. CARRIED.**

**C. Welcome**

Metropolitan Tikhon welcomed the members of the Metropolitan Council present for the meeting and noted that a key task of the Council, according to the Statute, is to implement the decisions of the All-American Council. He introduced the members of the Standing Synod, noting that he has appointed Archbishop Benjamin as chairman of the committee that will plan the celebration of the 50<sup>th</sup> anniversary of OCA autocephaly and expressed gratitude to Bishop Paul for chairing the Preconciliar Commission and hosting the 19<sup>th</sup> All-American Council in his diocese. He welcomed the new and reelected members of the Metropolitan Council. He thanked those members who will be completing their terms this year, for their contributions as members of the Council.

**E. Metropolitan's Report**

In his oral report, Metropolitan Tikhon focused particularly on the chancery restructuring that has been undertaken. He thanked Bishop Daniel who has been serving as chancery administration and consultant to the Metropolitan during this process as well as the members of the restructuring committee (Lisa Mikhalevsky, Frs. John Dresko and Timothy Hojnicky). He noted that the restructuring has been, in effect, a six-year process since his election to the Primacy.

He reflected on various aspects the recent 19th All-American Council, noting that it was a positive and peaceful gathering. He expressed satisfaction with the publication of his new book "*Of What Life Do We Speak? Four Pillars for the Fulfillment of the Apostolic Work of the Church*" just before the All-American Council. His Beatitude indicated that the book is a beginning. He reported that Fr. John Matusiak is preparing a study guide for the book and distributed samples pertaining to some of the chapters.

With regard to the chancery restructuring, he noted that all chancery staff members were asked to resign but that he only accepted the resignations of the three church officers. His Beatitude expressed profound gratitude to the officers for their hard work and was joined by the Council which also expressed its appreciation. He also indicated the need to restructure Metropolitan Council committees for more efficient functioning. Concerning the Youth Department, he stated that he has prepared a proposal for the expansion of Youth and Young Adult Ministry, which also indicates how the funds raised during the spontaneous fund drive at the All-American Council, could be used. He also briefly reported on his work in external affairs, particularly his recent visit to Poland.

Following a recess for lunch at 12:30 PM, the afternoon session was called to order at 1:34 PM.

Questions and extensive discussion ensued concerning the Metropolitan's Report, particularly concerning youth work and the pledge drive at the All-American Council. His Beatitude and Bishop Daniel also provided clarifications concerning chancery restructuring.

Following a short recess at 2:48 PM, the session resumed at 3:09 PM.

**G. Secretary's report**

Fr. Eric Tosi presented an oral report, which provided an update on chancery building maintenance, indicating that roof and driveway have been repaired and carpeting has been replaced. Outstanding items include replacement of the solarium windows and the front door. Regarding the archives renovation project, he

indicated that planning for the work is progressing slowly and that there have been some cost overruns. In response to questions, Fr. Eric assured the Council that the Pods where the Archives will be stored temporarily are waterproof. He also reported some details concerning development of the redesigned OCA website, which is nearing completion. He also stated that work on the 2019 Desk Calendar is underway and that the new metrical book has been published by St. Vladimir's Seminary Press.

Fr. Eric then summarized the attached 19<sup>th</sup> All-American Council Post Council Report and underscored the positive content of the Council, particularly the youth program, as well as the quality of the venue. He noted that actionable items are the Statute amendments, the financial resolutions and youth ministry. He then highlighted the attached survey of Council participants, which led to an extensive discussion of many facets of the Council and suggestions for possible improvements for the future. He further indicated the recommendations concluding his report, which led to additional discussion.

Fr. Eric then presented the draft *Social Media Guidelines for Clergy and Lay Leaders of the Orthodox Church in America*, which includes a *Social and Digital Media Code of Conduct* and an *Image Release Form*. In discussion, Fr. Eric indicated that the policy would apply to employees and volunteers for the OCA, as well as members of its governing bodies. It would not apply to all clergy throughout the Church. However, dioceses are welcome to adopt the policy.

**G.1. MOTION LANE/PARNELL – To adopt the *Social Media Guidelines for Clergy and Lay Leaders of the Orthodox Church in America*, which include the *Social and Digital Media Code of Conduct* and the *Image Release Form*. CARRIED with 5 opposed (Dresko, Lewis, Linnehan, Mikhalevsky, Perdomo) and 3 abstentions (Breckenridge, Hoffman, Isaac).**

**H. Legal matters (attached)**

**H.1. MOTION BRECKENRIDGE/DRESKO – To move into executive session. CARRIED.**

In executive session, David Lane, Legal Committee chairperson, and Judge E.R. Lanier, OCA General Counsel, presented a variety of current and potential legal issues.

**H.2. MOTION DRESKO/RHODES – To move out of executive session. CARRIED.**

Additional discussion of legal matters took place concerning SMPAC, ORSMA and related issues.

The day's sessions were adjourned with prayer at 4:39 PM.

After dinner, orientation for new Council members conducted by Judge E.R. Lanier took place.

**THURSDAY, SEPTEMBER 20, 2018**

The morning session was opened with prayer at 9:05 AM.

**F. Chancellor's Report**

Fr. John Jillions delivered a brief report. He indicated that a full accounting of his work is available in his comprehensive report to the recent All-American Council. His report touched on the chancery restructuring as a positive measure and encouraged the Metropolitan Council to be assiduous in its responsibilities as defined by the OCA Statute. He concluded by thanking His Beatitude, the Holy Synod and the Metropolitan Council for the opportunity to serve as Chancellor for seven years. He stated that there is nothing new to report on SMPAC and ORSMA since the All-American Council. An issue of concern is reporting from the dioceses on compliance with the Policies, Standards and Procedures on Sexual Misconduct. Discussion ensued and suggestions to improve compliance reporting were offered.

Metropolitan Tikhon distributed and presented for later discussion the proposal he had drafted for the expansion of Youth and Young Adult Ministry.

## **I. Stewards of the OCA**

Archdeacon Joseph Matusiak, Director of the Stewards of the Orthodox Church in America (SOCA), presented an oral report. He indicated that he has taken the fundraising course at Indiana University for which funding had been allocated by the Metropolitan Council, which was very helpful. He recounted his fundraising efforts and presented various ideas regarding the funds raised for Youth Ministry at the All-American Council. In discussion, it was agreed that the third Sunday in October would henceforth be SOCA Sunday for its annual appeal. Extensive discussion ensued on various fundraising strategies and the allocation of funds raised for Youth Ministry during the pledge drive at the All-American Council.

Following a short recess at 11:06 AM, the session resumed at 11:34 AM.

## **J. Metropolitan Council Committees**

Metropolitan Tikhon suggested that discussion of Metropolitan Council Committee Reorganization take place after the reports of the Committees.

### **J.2. Charity (attached)**

Archpriest Alexander Kuchta, Committee Chairman, summarized the Committee's attached report and announced that the Committee had yesterday approved an additional disbursement of \$3000 to St. Basil Church in Wilmington, NC for victims of flooding caused by Hurricane Florence. Fr. Kuchta also reported that, as his term on the Metropolitan Council is ending at this meeting, that he has asked Fr. Antonio Perdomo to take over as chairman, pending the approval of His Beatitude.

The possibility of further aid for the victims of Hurricane Florence was discussed and the following motion was proposed.

#### **J.2.A. MOTION MIKHALEVSKY/HOFFMAN – To authorize the Treasurer to disburse up to \$5000 in aid to St. Basil Church in Wilmington, NC for those affected by Hurricane Florence.**

After extensive discussion on this type of disbursement and the purposes of the Charity Committee, the motion was withdrawn and tabled.

### **J.3. Ethics**

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

### **J.4. Human Resources**

Elizabeth Mikhalevsky, Committee Chairperson, reported that the Committee has been inactive while she and some of its members have been working with Bishop Daniel on chancery restructuring. Work on revising the Employee Handbook and other matters will resume once restructuring is completed.

### **J.5. Internal Governance**

Father Eric Tosi indicated that the Metropolitan Council term of Father Chad Hatfield who was Chairman of the Committee has ended and then provided an update on the Committee's work. He noted the requirement of

OCA Statute to appoint or reappoint members of the internal Auditing Committee during the first meeting of the Metropolitan Council after a regular All-American Council. He indicated that John Skrobat and Dimitri Pletz, who are eligible to remain on the Committee for another term, have agreed to continue, while Matsushka Theodora Blom asked to not be considered for reappointment due to other commitments. Fr. Eric reported that a search was conducted for a replacement. Polly Walker who has requisite qualifications has agreed to serve on the Committee.

**J.5.A. MOTION DRESKO/GRABAN – In accordance with Article V, Section 9 of the OCA Statute, to reappoint John Skrobat and Dimitri Pletz for an additional term as members of the internal Auditing Committee and to appoint Polly Walker as a new member of the Committee. To express gratitude to Matsushka Theodora Blom for her work as a member of the Committee. CARRIED.**

**J.6. 50<sup>th</sup> Anniversary Committee**

Archbishop Benjamin, Chairman of the Committee, outlined preliminary plans for the celebration of the 50<sup>th</sup> anniversaries of autocephaly and the glorification of St. Herman of Alaska, which will be marked in 2020. He indicated that events and projects would include a concluding celebration in Washington, DC, pilgrimages to Alaska, a youth rally and the publication of a historical commemorative book. It was also noted that 2019 would mark the 225<sup>th</sup> anniversary of the arrival of Saint Herman and other missionaries in Alaska.

**J.1. Metropolitan Council Committee Reorganization**

An extensive discussion took place on the history and purposes of the various committees of the Metropolitan Council and how they facilitate the competencies of the Metropolitan Council as defined in the OCA Statute. It was agreed that the Internal Governance Committee would develop a proposal for the reorganization of the committee structure within the Metropolitan Council.

Following a recess for lunch at 12:37 PM, the afternoon session was called to order at 1:31 PM.

Metropolitan Tikhon announced that he has appointed Archpriest Kirill Sokolov as the new Chairman of the Internal Governance Committee.

**K. Treasurer's Report (attached)**

Melanie Ringa highlighted the attached Treasurer's report and appendices, which included 2018 financial results for the first half of the year, the proposed balanced budget for 2019 and audited final financial statements for 2016 and 2017 as well as the recently completed reports of both the external and internal auditors. The Council discussed credit card reporting procedures, as indicated in the internal audit report. The Metropolitan Council indicated the strong need for this to be corrected immediately.

Fr. John Dresko proposed on behalf of the Finance Committee that in conjunction with the chancery restructuring and some possible indeterminate financial factors, the issue of employee contributions for health insurance premiums that the Metropolitan Council had previously discussed be reconsidered. It was reported that the OCA currently covers the entire insurance premium for its employees, while many employers, even in the Church, require as much as a 50% contribution towards health insurance premiums from its employees

**K.1. MOTION DRESKO/PARNELL – That employees of the Chancery be required to contribute 15% of medical insurance premiums, effective January 1, 2019. CARRIED with 5 opposed (Dunlop, Jillions, Kuchta, Linnehan, Sokolov) and 5 abstentions (Bilas, Hoffman, Isaac, Petasky, Tosi).**

**K.2. MOTION DRESKO/MIKHALEVSKY - To approve the proposed 2019 budget as amended by the previous resolution. CARRIED with 1 abstention (Linnehan).**

Ms. Ringa then reviewed All-American Council revenues and expenses where there is a surplus and the Archives Renovation funding which is running over budget. Options for additional funding of the project were discussed. She also presented a report on Youth Ministry pledges received from the All-American Council. She thanked the Council for the honor to serve as OCA Treasurer.

**L. Finance/Investment Committee**

Archpriest John Dresko reported that investment in a promissory note with OCCIF (Orthodox Church Capital Improvement Fund), approved at the last Metropolitan Council meeting, has not yet taken place due to some issues remaining to be worked out. He spoke of the work of OCCIF and the possibility of its closer affiliation with the OCA. He indicated that if there is appearance of any conflict of interest he would resign from the OCCIF board.

**M. Planting Grant requests (attached)**

Father Eric Tosi presented the attached planting grant requests submitted by Father John Parker from the Department of Evangelization. The request for an additional \$20,000 in order to convene diocesan representatives to discuss planting grants and related matters was tabled due to the upcoming reorganization of OCA departments.

**M.1. MOTION TOSI/HOJNICKI - To approve funding for two planting grants in 2019 as presented totaling \$36,000. CARRIED.**

**N. External Affairs Report**

Protopresbyter Leonid Kishkovsky, Director of External Affairs and Interchurch Relations, indicated that a comprehensive review of recent OCA involvement in External Affairs and Interchurch Relations may be found in the report submitted to the 19<sup>th</sup> All-America Council. He delivered an oral report summarizing recent events particularly the unfolding situation in Ukraine and its worldwide effects throughout the Orthodox Church. Extensive discussion and questions followed.

The day's sessions were adjourned with prayer at 4:04 PM.

**FRIDAY, SEPTEMBER 21, 2018**

The morning session was opened with prayer at 9:04 AM.

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

Father Gleb McFatter, Pension Board Chairman, highlighted the attached report on the OCA Pension Plan via conference call. Fr. McFatter and Maureen Ahearn, Pension Plan Administrator, answered questions and provided clarifications on issues raised by Metropolitan Council members. Compliance with mandatory enrollment in the Plan for eligible clergy, as required by All-American decisions, was discussed, along with possible measures to enforce such compliance.

**Q.1. MOTION JILLIONS/BRECKENRIDGE – To express concern regarding the low level of compliance with mandatory enrollment in the OCA Pension Plan for eligible OCA clergy and to request the Holy Synod to address this issue and to provide a report on their action to the Metropolitan Council. CARRIED.**

**R. Department Report - Youth**

Metropolitan Tikhon presented changes to the Youth Ministry Proposal that he had previously distributed, which were extensively discussed. The allocation of funds from the pledge drive during the 19<sup>th</sup> All-American Council was deliberated. It was indicated that pledges total \$87,000, although less than half have been received and receipted. It was also noted that the pledge drive as initiated during the All-American Council was targeted for funding a process towards hiring a full-time Youth Director. It was decided to approve the recommendation of the Youth Ministry Proposal as follows.

**R.1. MOTION DRESKO/POPESCU – To endorse a 1-year pilot program to establish feasibility of the establishment and definition of a full time youth director/coordinator for the Orthodox Church in America and to approve funding of this program from receipted pledges up to \$87,000. CARRIED.**

Following a short recess at 10:19 AM, the session resumed at 10:45 AM.

**S/T. Strategic Planning/Open Discussion**

A variety of issues pertaining to the work, role and structure of the Metropolitan Council and All-American Council were discussed. It was suggested that the Four Pillars indicated in Metropolitan Tikhon's book "*Of What Life Do We Speak? Four Pillars for the Fulfillment of the Apostolic Work of the Church*" be integrated into a statement conveying the Metropolitan Council's work and accomplishments. In response to questions regarding job responsibilities of officers and staff in the context of chancery restructuring, a flow chart of the new structure was shown. Metropolitan Tikhon indicated that as mandated in the OCA Statute, the Metropolitan Council would be asked, to endorse a candidate for Chancellor to be confirmed by the Holy Synod in October. Further discussion on restructuring ensued and Metropolitan Tikhon provided additional clarifications. Metropolitan Tikhon presented certificates of appreciation for being parish members of SOCA to representatives from St. Luke Church in Mclean, VA and Holy Apostles Mission in Mechanicsburg, PA

**U. Adjournment**

Council members agreed to proposed dates for meetings of the Metropolitan Council in 2019. The meetings were scheduled for February 13-15 and September 18-20. In concluding remarks, Metropolitan Tikhon thanked Council members for a productive meeting and declared the meeting closed.

The meeting was adjourned with prayer at 11:57 AM.

Respectfully submitted,

Alexis Liberovsky,  
Recording Secretary

**Metropolitan Council Teleconference  
October 18, 2018  
Minutes**

**Members present:** Archpriest John Jillions, Archpriest Eric Tosi, Ms. Melanie Ringa, Archimandrite Joseph Hoffman, Archpriest Antonio Perdomo, Archpriest Kirill Sokolov, Archpriest John Dunlop, Archpriest Dennis Rhodes, Archpriest John Dresko, Archpriest Timothy Hojnicky, Priest Joseph Ciarciaglino, Priest Gabriel Bilas, Priest Nikolai Breckenridge, Protodeacon Jesse Issac, Ms. Lynnell Brunswig, Ms Katherine Vitko, Mr. David Lane, Mr. Mark Petasky, Mr. Jeremy Pletnikoff, Mr. Robert Graban, Mr. Michael Danchak, Mr. Bogdan Popescu, Mr. James Kornafel, Mr. Christopher Lewis. **Guest:** Judge E.R. Lanier, General Counsel

**Members not present:** Archpriest Alexander Garklavs, Archpriest Thomas Moore, Priest James Parnell, Priest Valerii Shemchuk, Mr. Michael Thompson

His Beatitude opened the meeting with a prayer, and opening remarks. His Beatitude reminded the members that the meeting has one matter to consider, the endorsement of His Beatitude's nominee for the position of Chancellor of the Orthodox Church in America: Archpriest Alexander Rentel.

Archdeacon Joseph Matusiak proceeded with roll-call to establish a quorum. A quorum was established.

Before proceeding with a roll call vote, His Beatitude noted that each member of the council was welcome to comment on the proposition and that he would place no limits on such comments and discussion. A brief discussion was held both on the nominee, and the process leading up to the nominee.

Archdeacon Joseph then proceeded with a roll-call vote.

The nomination of Archpriest Alexander Rentel received endorsement by the Metropolitan Council with one objection and one abstention.

His Beatitude concluded the meeting by thanking the members of the council for their diligent work on behalf of the Orthodox Church in America.

His Beatitude closed the meeting with a prayer.

# Metropolitan Council

*As of February 11, 2019*

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

## Officers of the Orthodox Church in America

Archpriest Alexander Rentel (Chancellor)  
561 Scarsdale Road  
Tuckahoe, NY 10707-1659

Home: 914-771-6252  
Email: [arentel@oca.org](mailto:arentel@oca.org)

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

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

CH, ET, IG

HR, IG, LE

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

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

FI

## Members elected by All-American Council

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

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

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

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

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

CH, ET, HR

HR, IG

### Members elected at 19<sup>th</sup> AAC for Three-Year Term

Archpriest Thomas Moore  
634 Wren Road  
Lexington, SC 29073-9106

Cell: 803-318-6093  
Church: 803-926-8744  
Email: [frthomas@holypostles.org](mailto:frthomas@holypostles.org)

M. Lynnell Brunswig  
3418 Humphrey Street SE  
Olympia, WA 98501-3941

Cell: 360-480-2818  
Email: [lynnellbrunswig@comcast.net](mailto:lynnellbrunswig@comcast.net)

CH, ET

HR, IG



<b>Members elected at 19<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest Kirill Sokolov 1520 Green Street San Francisco, CA 94123-5102</p> <p>Church: 415-673-8565 Cell: 415-300-0106 Email: <a href="mailto:frkirill@holy-trinity.org">frkirill@holy-trinity.org</a></p>	<p>Mark Linnehan 1065 Country Club Road Camp Hill, PA 17011-1049</p> <p>Home: 717-730-3733 Email: <a href="mailto:mark@linnehan.net">mark@linnehan.net</a></p>
<b>IG</b>	<b>HR, IG</b>
<b>Alternates elected at 19<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest David Rucker 414 Mission Road Kodiak, AK 99615-6329</p> <p>Cell: 904-599-5812 Email: <a href="mailto:frdavid@ocmc.org">frdavid@ocmc.org</a></p>	<p>Michael Thompson 2622 DePaul Drive Vienna, VA 22180-7052</p> <p>Home: 703-204-9092 Email: <a href="mailto:dunaad@msn.com">dunaad@msn.com</a></p>
<b>Members Elected by Diocese</b>	
<b>Diocese of Alaska</b>	
<p>Archpriest Mikel Bock PO Box 670064 Chugiak, AK 995667-0064</p> <p>Home: 907-444-8545 Email: <a href="mailto:mbock1@gci.net">mbock1@gci.net</a></p>	<p>Dorothy Chaney PO Box 6143 Napaskiak, AK 99559-6143</p> <p>Cell: 907-737-2462 Email: <a href="mailto:dchaney@avcp.org">dchaney@avcp.org</a></p>
<b>Albanian Archdiocese</b>	
<p>Archpriest Dennis Rhodes 48 North School Lane Souderton, PA 18964-1100</p> <p>Cell: 203-598-4678 Email: <a href="mailto:dennistr648@hotmail.com">dennistr648@hotmail.com</a></p>	<p>Donna Dimitri 1901 Beverly Road Burlington, NJ 08016-1114</p> <p>Cell: 609-685-1651 Email: <a href="mailto:donnadimitri@gmail.com">donnadimitri@gmail.com</a></p>
<b>CH</b>	<b>LE</b>
<b>Bulgarian Diocese</b>	
<p>Priest Gabriel Bilas 2439 S. Long Lake Road Fenton, MI 48430-1461</p> <p>Cell: 330-285-1740 Email: <a href="mailto:frgabrielmm@gmail.com">frgabrielmm@gmail.com</a></p>	<p>Bogdan Popescu 11684 Ventura Blvd, #612 Studio City, CA 91604</p> <p>Cell: 310-954-6234 Email: <a href="mailto:raycnewman@sbcglobal.net">raycnewman@sbcglobal.net</a></p>
<b>ET</b>	
<b>Archdiocese of Canada</b>	

<p>Protodeacon Jesse Isaac 7240 190 Street Edmonton, AB T5T 5W5 Canada</p> <p>Home: 780-668-0881 Email: <a href="mailto:jesseisaac@gmail.com">jesseisaac@gmail.com</a></p>	<p>Mark Petasky 110, 53226 Range Road 261 Spruce Grove, AB T7Y 1A3 Canada</p> <p>Home: 780-218-8713 Email: <a href="mailto:mpetasky@gmail.com">mpetasky@gmail.com</a></p>
HR	FI
<b>Diocese of Eastern Pennsylvania</b>	
<p>Archpriest Timothy Hojnicky 624 Allenview Drive Mechanicsburg, PA 17055-6181</p> <p>Cell: 717-645-5281 Email: <a href="mailto:thoj@hotmail.com">thoj@hotmail.com</a></p>	<p>Susan Grancey Schlasta 1744 Lakeland Drive Scott Township, PA 18433-3117</p> <p>Cell: 570-840-9544 Email: <a href="mailto:sschlasta@gmail.com">sschlasta@gmail.com</a></p>
ET, HR	ET
<b>Diocese of Midwest</b>	
<p>Archpriest Alexander Garklavs 963 John Glen Drive Seven Hills, OH 44131-2923</p> <p>Home: 216-524-8989 Email: <a href="mailto:garklavs@cox.net">garklavs@cox.net</a></p>	<p>Robert Graban 29541 Oakview Street Livonia, MI 48154-4463</p> <p>Cell: 313-702-1300 Email: <a href="mailto:RGraban@gmail.com">RGraban@gmail.com</a></p>
	CH, FI, IG
<b>Diocese of New England</b>	
<p>Priest James Parnell 205 Scarborough Street Hartford, CT 06105-1130</p> <p>Cell: 914-573-8051 Office: 860-922-5329 Email: <a href="mailto:OCAchaplain@gmail.com">OCAchaplain@gmail.com</a></p>	<p>Michael M. Danchak 339 Oxbow Road Durham, CT 06422-1814</p> <p>Home: 860-346-6957 Email: <a href="mailto:mmdanchak@comcast.net">mmdanchak@comcast.net</a></p>
FI	CH, IG
<b>Diocese of New York and New Jersey</b>	
<p>Igumen Joseph (Hoffman) PO Box 759 Pearl River, NJ 10965-0759</p> <p>Office: 845-548-3170 Email: <a href="mailto:fr.joseph@holymtransf.org">fr.joseph@holymtransf.org</a></p>	<p>James P. Kornafel 16 Schaeffer Lane Freehold, NJ 07728-2809</p> <p>Cell: 732-740-1308 Home: 732-462-3388 Email: <a href="mailto:jimmyk@optonline.net">jimmyk@optonline.net</a></p>
ET, HR	IG
<b>Romanian Archdiocese</b>	
Open	Open
<b>Diocese of South</b>	

<p>Priest Joseph Ciarciaglino 3025 Geiger Court Clearwater, FL 33761-2005</p> <p>Cell: 727-692-7195 Email: <a href="mailto:jjciar@hotmail.com">jjciar@hotmail.com</a></p>	<p>Christopher Lewis 520 West Atlanta Street Marietta, GA 30060- 2262</p> <p>Cell: 678-294-9198 Email: <a href="mailto:reachchrislewis@gmail.com">reachchrislewis@gmail.com</a></p>
LE	IG
<b>Archdiocese of Washington</b>	
<p>Priest Valery Shemchuk 46174 Chester Terrace Sterling, VA 20165-8734</p> <p>Home: 202-573-7778 Email: <a href="mailto:priestvalery@stnicholasdc.org">priestvalery@stnicholasdc.org</a></p>	<p>Michael Thompson 2622 DePaul Drive Vienna, VA 22180-7052</p> <p>Home: 703-204-9092 Email: <a href="mailto:dunaad@msn.com">dunaad@msn.com</a></p>
ET, HR	
<b>Diocese of West</b>	
<p>Archpriest John J. Dresko 1747 Crystal Downs Ave Las Vegas, NV 89123-2413</p> <p>Cell: 860-833-4921 Email: <a href="mailto:fatherjohn@lasvegasorthodox.com">fatherjohn@lasvegasorthodox.com</a></p>	<p>David R. Lane, Esq 1258 Commons Drive Sacramento, CA 95825-7025</p> <p>Home: 916-925-7916 Cell: 530-632-9423 Email: <a href="mailto:drlane@yubasutterlaw.com">drlane@yubasutterlaw.com</a></p>
FI, HR	LE, HR
<b>Diocese of Western Pennsylvania</b>	
<p>Priest Nikolai Breckenridge 150 Elmtree Road New Kensington, PA 15068-4636</p> <p>Cell: 570-604-4277 Home: 724-337-8162 Email: <a href="mailto:nikolai.breckenridge@gmail.com">nikolai.breckenridge@gmail.com</a></p>	<p>Ray (Skip) Steeb 10185 Woodbury Drive Wexford, PA 15090-9581</p> <p>Cell: 412-389-5684 Email: <a href="mailto:ray@mycci.net">ray@mycci.net</a></p>
FI	
<p><b>Committee Codes:</b> CH = Charity ET = Ethics FI = Finance/Investment</p>	<p>HR = Human Resources IG = Internal Governance LE = Legal <b>Bold/Italic = chairperson</b></p>

**REPORT OF HIS BEATITUDE, METROPOLITAN TIKHON**  
**Metropolitan Council Spring Session 2019**  
**February 13-15, 2019**

**Welcome.** I welcome all of you to the Spring Session of the Metropolitan Council. This is the first meeting of this, the permanent executive body of the Church Administration, since the appointment as Chancellor of Archpriest Alexander Rentel. In a moment, I will more formally welcome Fr. Alexander who will have much to contribute to our work this week.

I look forward to receiving the input and guidance from the members of this sacred body over the next few days as we work collaboratively “for the purpose of implementing the decisions of the All-American Council” and continuing “the work of the Council between its sessions” (Article V.1). Beyond these specific mandates, it is always a joy to gather together and to work with all of you for the benefit of the Orthodox Church in America.

We especially welcome the members of the Standing Synod who are with us this week:

- His Eminence, Archbishop Benjamin of San Francisco and the Diocese of the West, who is serving as the Chair of the Planning Committee for the 50th Anniversary of Autocephaly and the Glorification of Saint Herman of Alaska. We will have occasion to hear from His Eminence about the progress and plans of that committee. Unfortunately, he experienced some flight delays so he will be joining us tomorrow.

- His Eminence, Archbishop Michael of New York and the Diocese of New York and New Jersey, who also serves as the Secretary of the Holy Synod.

- His Eminence, Archbishop Irénée of Ottawa and the Archdiocese of Canada, who is replacing His Grace, Bishop Paul on the Standing Synod and hence, at these meetings of the Metropolitan Council. Due to the funeral for Archimandrite Philip [Speranza], His Eminence will also be joining us tomorrow. We particularly look forward to his participation as a means of highlighting the important Canadian component of our Church. Although in many specific areas of the Metropolitan Council’s competencies, a distinct and unique approach is required (especially as concerns legal and financial matters), there is much more that unites the Archdiocese of Canada with the wider Orthodox Church in America in terms of our mission and vision. It is always good to remind ourselves that our Church is not limited to the United States and that both Canada and Mexico are integral contributors to our existence and presence in North America.

- Although he is not on the Standing Synod, this week we also welcome His Grace, Bishop David of Sitka and Alaska, who serves as the Synodal Liaison for the Pension Board, for which we have dedicated a significant portion of this week’s meeting. The Diocese of Alaska, of course, is the cornerstone of the North American Mission and of what we now call the Orthodox Church in America. The commemoration of the 225th Anniversary of the

arrival of St. Herman and his fellow missionaries takes place this year, and in 2020 we will celebrate the 50th Anniversary of his glorification, one of the first acts of the autocephalous Orthodox Church in America. The next few years will present many opportunities to highlight not only the historical importance of the Diocese of Alaska, but the current missionary, educational, and pastoral initiatives that are taking place under the guidance of the Bishop of Alaska, who in a few days will celebrate his fifth anniversary of episcopal consecration. Axios!

- Finally, I would like the record to reflect our debt of gratitude to Bishop Paul of Chicago and the Diocese of the Midwest for his contributions to the Metropolitan Council and for his work as Chair of the Pre-Conciliar Commission for the 19th All-American Council.

The Standing Synod will meet separately in the evenings of our gathering this week and I look forward to their contributions to the overall work of the Metropolitan Council.

**Metropolitan Council Members: Beginning Term.** I extend a warm welcome to new Metropolitan Council Members who have joined us from the dioceses:

- *Diocese of Alaska:* Archpriest Mikel Bock, St Juvenaly and his Companion Mission, Chugiak, AK; Dorothy Chaney.
- *Diocese of the Midwest:* Archpriest Alexander Garklavs, Holy Trinity Church, Parma, OH, and former Chancellor of the Orthodox Church in America.
- *Archdiocese of Washington:* Michael Thompson.

We look forward to your contributions to the work of this body and to the mission of the Orthodox Church in America. I would also invite each you, perhaps in our final session on Friday, to share your thoughts about your overall experience of your first meeting of the Metropolitan Council.

**Metropolitan Council Members: Concluding Term.** There is no one rotating off the Metropolitan Council at this Spring Session. However, I would like to express once again my thanks and appreciation to Archpriest John Jillions, who served as Chancellor of the Orthodox Church in America for seven years and, in that position, was an ex officio member of this body. His contributions to the Metropolitan Council, to my Office, and to the Orthodox Church in America over those years are both significant and appreciated. The position of Chancellor is not an easy one in and of itself, but has been particularly heavy during many periods of the past ten years. Although I have expressed my gratitude and thanks to him on several previous occasions, I would like to take this opportunity to let the record reflect my continued appreciation to him for his ministry as Chancellor and to Matushka Denise for her contribution to that ministry.

**Chancery Restructuring.** I will begin my report with an update on the Chancery Restructuring process.

- *Ad Hoc Restructuring Committee.* To begin, I would like to express my gratitude to the members of the Restructuring Committee who have, over the past year, offered their collective and personal dedication. I especially want to thank His Grace, Bishop Daniel, who has not only ably steered the work of this committee, but has personally assisted me, first as Administrative Consultant and then as Chancery Administrator during this transition. His Grace has been particularly helpful in maintaining the integrity of the Office of the Metropolitan during this time. His insight as a bishop of the Church was also crucial and provided further incentive for me to more seriously consider the benefits of having an auxiliary bishop.

The other members of the committee were drawn from the Metropolitan Council: Archpriest John Dresko (Chair of the Finance Committee), Archpriest Timothy Hojnicky, and Lisa Mikhalevsky (Chair of the Human Resources Committee). We had an excellent combination of talent with this group and while each of the members has particular gifts to offer to this work, they collectively provided a very holistic approach to every aspect of this fruitful journey. Fr. Timothy will present a more formal report on the overall work of the committee later in this meeting, but I wanted to formally express my thanks to each member of the committee.

I also wanted to share some thoughts on this process with the members of the Metropolitan Council. For me, there was both a personal and a professional component for the restructuring process: personal, in the sense that I wanted to establish a structure that would fit my administrative style and establish a collaborative system for the fulfilling of the work of the Chancery; and professional, in that the Chancery is not simply my personal office, but the nerve-center (so to speak) of the Orthodox Church in America. I believe that the entire Orthodox Church in America will benefit from this process and from the renewed Chancery that is beginning to take shape.

In January, this committee met for one final time in Washington, DC, at my Cathedral Rectory, and we reviewed both the progress to date and set out a trajectory for the next steps. As you know, my intention was to have completed the basic restructuring process by January 1, 2019, with the understanding that certain elements would continue beyond that date. Although we are not quite as far along as I had anticipated, I do feel that we have managed to address the core issues relating to the overall structure of the Chancery, which I presented to this body at our Fall meeting, and to begin the filling of the positions needed. It now falls to the Chancellor to carry this work forward.

- *Chancellor.* In the Fall, I indicated that I had a candidate in mind to fill the position of Chancellor, although I did not present his name pending his willingness to consider the position. In October, I forwarded to you the name and the CV of my candidate, Archpriest Alexander Rentel and, at a conference call on October 18, this body endorsed him. I then

presented his name to the members of the Holy Synod at our Autumn Session on October 23-26, 2018. After some discussion and a meeting with Fr. Alexander, the Holy Synod confirmed him, and I appointed him Chancellor of the Orthodox Church in America effective January 1, 2019.

At this time, I would like to introduce and formally welcome Fr. Alexander Rentel to the Metropolitan Council and express my sincere joy at having him on board. As I indicated, he officially began his ministry as Chancellor on January 1 of this year, although I should point out that he did quite a bit of preparatory work prior to that date -- both in holding meetings with individual staff here at the Chancery and in meeting with me on a number of specific issues. He has not only hit the ground running, but was, in fact, running before he hit the ground. Although it has only been a few weeks, I am very pleased to report that Fr. Alexander is working out very well and I feel a great relief in knowing that someone as capable as him is serving in this position.

The Chancery as a whole has witnessed an increase in activity and productivity through Fr. Alexander's presence and leadership. He has assumed the role of Chancellor as defined in the restructuring in a very competent and efficient manner, one which allows me to focus my own energies on the broader responsibilities I have as Primate. He is working closely with all the other officers and staff, particularly with Barry Migyanko, on the numerous clergy and official matters that come through this office.

- *Review of Orthodox Church in America Departments, Boards, Offices, and Commissions.* This has been on the table for several years now, and it is the area that requires the most immediate attention of the new Chancellor. We are prepared to tackle this review immediately after this Metropolitan Council meeting.

- *Communications.* Fr. Eric Tosi, Archpriest John Matusiak, Matushka Jessica Fuhrman and Ryan Platte all work diligently in this area. Nevertheless, it remains an area that could be expanded in terms of resources and planning. This is also an area that the Chancellor and I will focus on in the coming months.

The new Chancellor is allowing me to work on these long-term issues with the security of knowing that he has a firm grasp on the day-to-day activities that need to take place and the urgent matters that need to be addressed. He will report to you more on his own experience to date, but I am very pleased and am thankful to this body for its endorsement of such an excellent and churchly individual.

- *Treasurer.* The next most urgent position that needs to be filled is that of Treasurer, which has been a more complex process. It was always my intention -- and that of the Restructuring Committee -- to steadfastly maintain the high degree of accountability, transparency, and overall integrity that we have established over the past ten years with respect to the finances of the Church. Because of this, the job description of the Treasurer was the one that required the least amount of adjustment. Another difficulty in filling the

position of Treasurer is due to the undeniable excellence of the person who is currently serving in that role: Melanie Ringa.

As you know, Melanie has fulfilled her responsibilities as Treasurer most excellently for ten-plus years. She has been actively involved in all levels of the finances of the Church, including spearheading the very productive meetings of the Chancellors and Treasurers and working to implement, over the past two All-American Councils, a method of funding the Church. She has accomplished all this while maintaining strict vigilance over the day-to-day finances and investments of the Church.

Although we posted twice for the position of Treasurer, and asked several dioceses to post announcements as well, the initial search did not yield a single ideal candidate for our circumstances. Indeed, it was clear that it would be very difficult to find someone of Melanie's caliber who could fill this position for the half-time salary that we have been paying her. As a reminder, Melanie has been splitting her time between the Orthodox Church in America and St Vladimir's Seminary, where she serves as Chief Financial Officer.

While no single candidate came forward to fill the Treasurer position as originally configured, we did receive several excellent applicants, each offering professional skills in one or another aspect of the position. After reviewing this situation, the Restructuring Committee proposed taking a slightly different approach to finding a solution. In discussions with John Skrobat, Treasurer of the Diocese of New England and Chair of the Orthodox Church in America Internal Audit Committee, and also with the input and recommendation of Melanie herself, the following re-configuration of the Office of the Treasurer is being proposed:

- The job descriptions of the Treasurer should be divided into two jobs: part time Accounting Manager and part time Treasurer.
- The Accounting Manager position, which requires an accounting degree, would be the on-site person responsible for daily bookkeeping and accounting operations, and would report to the Treasurer.
- The Treasurer would have oversight responsibilities over the Accounting Manager and would review monthly bank and investment reconciliations, produce the quarterly Treasurer's Reports online, and report in person to the Metropolitan Council, the Holy Synod, and the All-American Council.
- The Finance Department budget would remain the same but would be reconfigured to reflect this new structure, with a salary for the Accounting Manager and a stipend for the Treasurer.

The position of Treasurer, of course, will statutorily require the endorsement of the Metropolitan Council and the confirmation of the Holy Synod. We are in discussions with



an excellent candidate for this position. For the position of Accounting Manager, we have already extended an offer to one of our four applicants for the position of Treasurer. I would like to express my sincere thanks, once again, to Melanie for her willingness to remain in her position during this interim period of continued transition in the Financial Office. She has been extremely helpful in providing guidance in this process, and I am grateful for assistance in the transition.

- *Chancery Administrator.* The third position that needs to be filled is that of Chancery Administrator, which is the title that has been chosen to replace the title of Secretary. This is another position that will be difficult to fill, in large part because of the dedicated pattern of work set by Fr. Eric Tosi.

The restructuring committee has revised the job description. I am considering several candidates for the position of Chancery Administrator and have made initial inquiries to one in particular. It is my hope to move this process along over the next month and to present a name to the Metropolitan Council for endorsement and to the Holy Synod for confirmation at the appropriate time, most likely via a teleconference.

In the meantime, you will see from Fr. Eric's report the wide range of items that this position needs to address. As I alluded to at our Fall meeting, I have asked Fr. Eric to remain on in his position during the first several months of this year. This was to both assist him in his transition to a new pastoral position and to take advantage of his years of experience in this position to effect a smooth transition. I would like to thank Fr. Eric for his years of faithful service and institutional memory within the Orthodox Church in America, the Chancery, and my Office, as well as to Matushka Christina and their children for their contributions to the overall life of the community here at the Chancery.

Fr. Eric will guide us through a discussion on the 20th All-American Council. As you will have noted in the reports sent out to you last week, there have been some rapid developments in the planning process for the All-American Council, even prior to the formation of a Preconciliar Commission. This body has been informed about the developments relating specifically to the question of the location of the All-American Council. The Holy Synod has also been apprised of the possibility of Baltimore as that location and, at a recent conference call held specifically to address this question, has provided its support for the location.

Another discussion that Fr. Eric will lead us through, together with our Archivist, Alexis Liberovsky, will be an update on the Archives restoration process. As you will have read in both Fr. Eric's report and in the accompanying documentation related to the Archives project, there are a number of questions that need to be considered by the Metropolitan Council, which is the body having fiduciary responsibility over such matters. The project has evolved beyond what had originally been presented to this body, and there is a need for us to reconsider all aspects of this question. I will speak more about this below.

**The *Four Pillars*.** With the foundations of the new structure being completed, and especially with my new Chancellor in place, I am prepared to move forward in a number of ways with respect to the future development of the Orthodox Church in America and the work of the Central Administration.

I have provided a broad outline of a vision for the Orthodox Church in America in my small booklet, *Of What Life Do We Speak: Four Pillars For The Fulfillment Of The Apostolic Work Of The Church*. My intention in publishing this work was not simply to give myself a writing exercise, but to provide a tool for the interactive involvement of all constituencies of the Church: diocesan, institutional, parish, and individual. I would ask that the members of the Metropolitan Council encourage such interaction and engagement in whatever way you can. To help, we are preparing some additional tools.

As I had indicated at our last meeting, I had asked Fr. John Matusiak to prepare for me a Study Guide for the *Four Pillars* document. This work has now been completed and proofread and will be posted on our website. I have prepared copies for you to take with you and to share with whomever you would like. I hope to distribute these later during the course of this meeting.

I am also planning to release very short video introductions to the various components of the document to encourage Church-wide discussion. I will begin simply with a single video encouraging Church-wide participation in the discussion on the *Four Pillars* and, as time and resources allow, will begin to prepare short videos on each of the subsections of the document.

As one example of a practical use of the *Four Pillars*, I am aware of several parishes that have already undertaken study sessions using the booklet. In addition, a large symposium is being planned for May 11-12, 2019 at the Mother of God Church in Princeton, NJ, with the blessing of His Eminence, Archbishop Michael and at the initiative of Archpriest Peter Baktis.

**Strategic Action Plan.** In addition to providing some framework for the broader activities of the Orthodox Church in America, the *Four Pillars* booklet now allows me to address more specific issues facing our Church -- and to do this, along with the various administrative bodies of the Church, in a more deliberate and systematic manner. Since the time of the All-American Council, I have been working on this in the form of a Strategic Action Plan for the next triennium. This is a work in progress, but I have dated it January 1, 2019, and I consider this to be the date of its initiation (even though it has not been published or distributed at this point).

I would like to share with the Metropolitan Council the overall shape of this Strategic Action Plan as well as some specific elements, particularly those that relate directly to the work of this body. The document parallels the various articles of the Statute, which I did mostly for ease of presentation and to more clearly articulate the various action items

under the general heading of the responsible administrative body (Holy Synod, All-American Council, Metropolitan Council, Diocese, Parish, etc).

Some of these items (*Four Pillars Study Guide, Chancery Restructuring, Archives, All-American Council*) I have already touched on above in my report. What follows is a sampling of other items, with particular emphasis on those that related directly to the work of this Council. I will note that there is a section related to the Holy Synod of Bishops (Article II of the Statute) which I have not yet discussed with my brothers, but which contains such items as 1) the compilation of a complete Rules and Procedures for the Holy Synod (II.5.aa) by the 20th All-American Council, which has been a work in progress for some time; and 2) consideration of what I call an approach of “liturgical sobriety” in the matter of liturgical practices throughout the Orthodox Church in America. This is a complex question, as we all know, but one which I believe is necessary for the Church as we continue to forge our self-identity as the autocephalous Church in America; and other matters. There are, of course, many other matters that the Holy Synod continues to address on an ongoing basis.

**The Metropolitan Council.** The Metropolitan Council is a key component in arriving at the above-mentioned self-identity and self-understanding of ourselves. This body provides us with an opportunity to understand ourselves as a single body and to work towards a common goal.

As I mentioned, the Archives restoration project finds itself at a critical stage. This specific project has led to the need to consider the longer-term needs of the Metropolitan and the Chancery in terms of location and the broader concerns that have been discussed for many years relating to the function and funding of the Central Administration.

To this point in time, I have personally advocated for us to remain here at the Chancery building, where we have been located for close to 60 years. It is a beautiful property. It provides the Metropolitan and the staff with a quiet place to work and pray. It is conveniently located close to two major international airports, and has tremendous historical meaning for the Orthodox Church in America. At the same time, there are many inconveniences.

- Travel to my own Archdiocese of Washington is difficult -- 5-7 hours each way by car, 3.5 hours by train, 4 hours by plane, when one includes all the logistics of those types of travel.
- Physical separation of the Chancery operation from the Primatial Archdiocese of Washington and from the Primatial Cathedral of St. Nicholas.
- High cost of living in Nassau County and in many neighboring areas of New York, which adds a financial burden to employees of the Chancery, and to the Orthodox Church in America as a whole, which must support this entire operation.

- Need to address the Archives situation which is blossoming into a larger project than anticipated.

At this point in time, I believe that these concerns, as well as the broader vision that we must take for the future of the Orthodox Church in America, call for the appointment of a small Relocation Committee. This would be an initial step, consisting of a small and focused task force which should begin considering, in a dispassionate and objective manner, the current assets and patrimony of the Orthodox Church in America, beginning with the Chancery itself.

Such a committee, I would envision, would be comprised of someone from this Metropolitan Council, someone from the Archdiocese of Washington, and someone from St. Nicholas Cathedral. Although Washington is an obvious relocation point, it will be important to consider other options, especially with relation to the Archives, since it has been suggested that these might be housed in locations such as St. Vladimir's Seminary or St. Tikhon's Monastery. These options have been considered in the past, as has the possibility of relocating to Washington. However, these discussions were often undertaken in the midst of past turmoil.

Since we find ourselves in a place of relative calm in the Church, I believe now is the time to more clearly -- and yet carefully -- to begin to consider such long-term questions.

In addition to this issue, this body will need to consider this week the work of the Metropolitan Council Committee Restructuring which was initiated at our Fall meeting. Archpriest Kirill Sokolov was appointed Chair of the Internal Governance Committee. I will meet with him and appoint 3-4 members of this Council to begin this work, overseeing it myself. In the meantime, I am proposing that we continue to place all the Metropolitan Council committees on hold until a revised structure can be presented to this body in the Fall.

**External Relations.** We will hear later this week from Protopresbyter Leonid Kishkovsky, the Director of the Department of External Affairs and Inter-Church Relations, but I would like to highlight a few items. I just completed a visit to Moscow for the celebrations of the 10th anniversary of the enthronement of His Holiness, Patriarch Kirill. Accompanying me were His Grace, Bishop Daniel; the Chancellor, Fr. Alexander Rentel; Melanie Ringa, our Treasurer; Archdeacon Joseph; and Roman Ostash. Also part of our delegation was Archpriest Daniel Andreyuk, who has completed his first year as Dean of St. Catherine's Representation Church. You can read and see more about this visit on our website.

**Thanks.** I am also grateful to two of my staff, whom I consider to form part of my external relations team: my Secretary and Deacon, Archdeacon Joseph Matusiak, and my Subdeacon and driver, but also photographer, and (along with Archdeacon Joseph) liturgical master of ceremonies, Roman Ostash. Archdeacon Joseph and Roman are always

on call in the many ways I require assistance. This is not limited to the practical needs of my office, but applies also to the broader work of the Church. I am thankful to all who work at the Chancery and offsite -- especially Katherine Linke and Svetlana Radunceva -- who faithfully continue their daily support for me, and offer extra diligence during events such as this week's Metropolitan Council meeting.

**Conclusion.** I would like to conclude my report to the Metropolitan Council by sharing with you the section of my Strategic Action Plan that relates to the Orthodox Church in America as a whole:

*As a local autocephalous Church, the Orthodox Church in America has a great responsibility on this continent both internally and externally. Internally, care must be given to the expansion of the mission of Orthodoxy in North America as expressed historically through the rich legacy and patrimony from 1794 through the present. Externally, attention should be given to strengthening the leadership role of the Orthodox Church in America in world Orthodoxy and in ecumenical and interfaith discussions.*

*In recent months, developments in world Orthodoxy have brought the subject of autocephaly to a place of prominence. The Orthodox Church in America needs to take a leadership role in these global discussions based, not on theory, but on her lived experience as a local autocephalous Church. In spite of, or perhaps precisely because of the ecclesiastical concerns and debates that have surrounded and continue to surround our autocephaly, the Orthodox Church in America is well positioned to provide a unique perspective to the rest of the Orthodox world. This perspective should be offered, not with arrogance, but as the fruit of a genuine self-examination of the successes and challenges of the past 50 years and a humble articulation of future possibilities.*

*Such self-examination and articulation should be expressed in a multitude of forums over the next three years, with particular emphasis on the celebrations of the 50th Anniversary of the Granting of Autocephaly and the glorification of St. Herman of Alaska in the year 2020. The lead-up and follow-up years (2019 and 2021) should also be given a relevant theme to build upon the broader theme of autocephaly and the patrimony of the Orthodox Church in America.*

**Action Items.**

- Contribute to global discussions on primacy, synodality, and conciliarity through

1/ the hosting of lectures, symposia, and discussions on these subjects in collaboration with scheduled events at our institutions (throughout 2019-2021);

2/proposing the names of bishops of the Orthodox Church in America to serve as chairs of Assembly Committees (May 31, 2019); and

3/ securing the inclusion of the Primate of the Orthodox Church in America on the Executive Committee of the Assembly of Bishops (December 31, 2019).

- Church-wide renewal in the areas of

1/ the planting missions and the revitalization of struggling parishes through the expansion and redefinition of the work of the Department of Evangelization (July 31, 2019);

2/ the identification and encouragement of vocations (bishop, clergy, monastics, and lay leaders) through the ongoing expansion of the Board of Theological Education, as we will hear this week a report on the "Thriving in Ministry" initiative, which is a key component of the larger clergy health question, so central to my *Four Pillars*; and

3/ the support of the health of clergy and their families through the work of the Pastoral Life Department and the "Thriving in Ministry" initiative.

- The Establishment and Church-wide proclamation of themes for the next four years, including

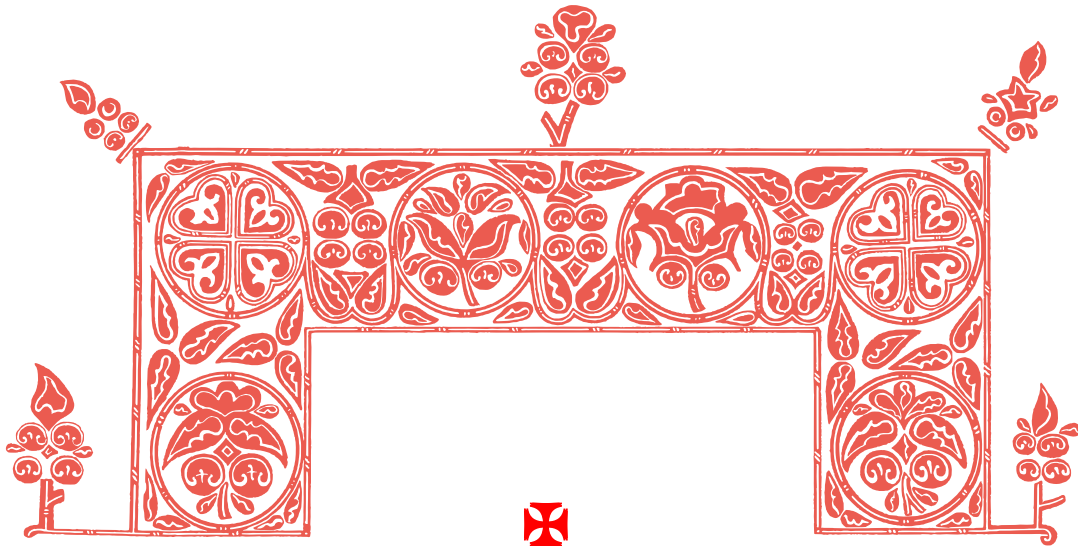
1/ 2019: Year of Prayer and self-examination (225th Anniversary of the arrival of the Alaskan Mission);

2/ 2020: Celebration of the 50th Anniversary of Autocephaly and the Glorification of Saint Herman of Alaska;

3/ 2021: Year of Outreach and Evangelism (20th All-American Council); and

4/ 2022: Year of Stewardship.

I look forward to discussing all of these matters during the course of our meeting and I welcome any questions at this time.



# OF WHAT LIFE DO WE SPEAK?

*Four Pillars for the Fulfillment of the  
Apostolic Work of the Church*

**The Most Blessed**  
**TIKHON**  
**Archbishop of Washington**  
**Metropolitan of All America and Canada**



## STUDY GUIDE

*For Individual and Group Use*

STUDY GUIDE



OF WHAT LIFE  
DO WE SPEAK?

*Four Pillars for the Fulfillment of the  
Apostolic Work of the Church*



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Pages 6 through 9.

## *Words of Life & Living Bread*

### *Something to think about.*



IN THE OPENING PARAGRAPH of this chapter, Metropolitan Tikhon notes that “the words of our Lord Jesus Christ are found throughout the Scripture... yet, our hearts often fail to grasp the deep meaning of these words and to recognize the transformative impact they could have in our life.”

Jesus Christ is the Living Word of God, as we read in the opening chapter of the Gospel of Saint John 1:1-18. The Living Word is revealed in the divinely inspired written words of Scripture. Many of Jesus’ contemporaries were well versed in the words found in Scripture, yet they remained oblivious to the spirit of these words, and ultimately failed to recognize the Living Word that the written words were intended to reveal. As we read in John 5:39-41, “You search the scriptures, because you think that in them you have eternal life; and it is they that bear witness to me; yet you refuse to come to me that you may have life.” They were most proficient with regard to *knowing the text*, but they did not *know God*.

### *Points to Ponder.*

1. Read James 1:22. What does Saint James say here about the word of God? Beyond reading the text of Scripture, what is essential for Christians in this regard?
2. What does Metropolitan Tikhon say concerning “the Christian experience?” How do we enter into “this life-giving experience” of our Lord?
3. According to Metropolitan Tikhon, what does it mean to be “a communicant of the Church?” How is this reflected in the sacramental and liturgical life of the Church?
4. In addressing the meaning of “the Christian world-view in the face of secularism,” what does Protopresbyter Alexander Schmemmann propose in his classic work, *For The Life Of The World?* What challenge does Father Alexander place before us?
5. In assessing your own conviction in the faith and commitment to Christ, how would you answer the question, “Are we willing to eat the flesh of the Son of Man and to drink His blood so that we might receive His Life and share that life with the world?” How might all of us, clergy and laity, “engage in an authentic Apostolic witness in North America, as individuals, as communities, and as a local Church?”
6. How might you, as an individual, and the parish community to which you belong offer “an authentic Apostolic witness” in proclaiming the Living Word of God?

### *Coming to Terms.*

***Ascetical efforts.*** In Matthew 5–7, our Lord reveals the essentials of virtuous and godly living, specifically mentioning the three primary *ascetical efforts* expected of His People – prayer, fasting and almsgiving. Our Lord is clear that these are not “options” that one may or may not choose to follow; rather, they are the primary means by which we put our faith into action in our lives.

***Apostolic Witness.*** The Apostles and Disciples who surrounded our Lord literally witnessed His life, death, resurrection, and ascension and proclaimed the Good News of the risen Lord and the Kingdom yet to be fully revealed, but already fully present in the life of His Body, the Church, to all who would receive it. Just as they proclaimed and witnessed to the Gospel, so too God’s People, some 2000 years later, are called to bear witness to the same Good News of eternal life – “for the life of the world” – with the same zeal that drove the Apostles to share that which they had witnessed “to the ends of the universe.”

## Will Ye Also Go Away?

### Something to think about.

**I**N THIS CHAPTER, Metropolitan Tikhon poses an important question, first asked by Father Alexander in his classic work, *For The Life Of The World*: “Of what life do we speak, what life do we preach, proclaim and announce when as Christians we confess that Christ died for the life of the world? What life is both motivation, and the beginning and the goal of Christian mission?” Father Alexander’s question, according to Metropolitan Tikhon, indeed sums up all the questions our Lord posed to His disciples: “What would you that I do for you? Who do men say that I am? Can you drink the cup which I drink? Could you not watch for one hour?” Ultimately, our Lord asks, “Will ye also go away?”

The Apostle Peter – himself often conflicted between belief and doubt – provides an answer as he confesses that Jesus is the Christ, the Son of the Living God.” Peter’s confession of faith in the person of Jesus Christ should also be our confession of faith as we embrace, as Metropolitan Tikhon notes in the opening paragraph of this chapter, “life through death, in which both the beginning and ending reality come together in an incomprehensible, yet ultimately life-giving, manner.”

### Points to Ponder.

1. What does Metropolitan Tikhon mean when he writes, “the whole drama of human existence often unfolds between these two realities of life and death?” How does encountering “life through death” factor into *acquiring God*, rather than merely *finding Him*, according to Archimandrite Aemilianos?
2. How does Saint Peter respond to our Lord’s challenge – “Will ye also go away?” What turmoil did Peter experience? How do we experience that same turmoil – and what should be our response to it? How do we sometimes “take up our Cross and follow Christ,” while at other times we are tempted to “go away?”
3. Metropolitan Tikhon points out that there are “thousands of factors” at work in our lives – “our human intelligence and wisdom, organization and planning” – with regard to Christian life. Beyond these, what is the primary factor that should define us as Christians? What, according to Father Alexander, is essential, in embracing the Church as “the sacrament of the Kingdom?”
4. Describe the world’s view of human life. Why is it considered “a false criterion” by which to judge our lives? What does it fail to take into account with regard to the true “worth of a human life?”
5. In what ways can we, like Saint Silouan, become “a true image” of our Lord? How can we experience “the fullness and timelessness of Christ’s love, life, and light... even as we draw closer to our own death?” How does our Lord’s Passion, Crucifixion, Burial and Resurrection “transfigure time” – and us?
6. What, as Metropolitan Tikhon notes in the concluding paragraph of this chapter, should we do to “actively pursue the Lord” instead of merely “going away?” What must we “lay aside” in pursuing God’s divine grace as individuals, as families, and as parish communities? How should we understand the fact that “we are already dead? What two insights does Father Sophrony offer as “a higher criterion for valuing the worth of human beings?” How might we begin to acquire these gifts?

### Coming to Terms.

**Secularism.** According to the Merriam-Webster Dictionary, *secularism* is defined as “indifference to or rejection or exclusion of religion and religious considerations.” A secularist world-view, then, embraces the notion that there is nothing beyond this physical world, that the deity – if indeed there is one – plays no part in human lives. At the outset of this chapter, Metropolitan Tikhon offers Father Alexander’s definition of secularism as “an ‘explanation’ of death in terms of life. The only world we know is this world, the only life given to us is this life – so thinks a secularist – and it is up to us men to make it as meaningful, as rich, as happy as possible. Life ends with death.”

Pages 15 through 19.

## *The Four Pillars of Our Healing*

### *Something to think about.*

**I**N ONE OF THE HYMNS SUNG DURING THE ORTHODOX CHRISTIAN RITE OF BURIAL, we sing, “Beholding the sea of life surging with the storm of temptation, and taking refuge in Thy calm haven I cry unto Thee: Raise up my life from corruption, O greatly merciful One.” The Church, Metropolitan Tikhon observes, is often depicted as a ship or ark – a sturdy vessel in which the People of God encounter safety and solace as they traverse life’s countless challenges, “not merely [as] passengers ‘along for the ride,’” but as members of the living organism known as “The Church.” Just as our Lord pulled Saint Peter into the boat, preventing him from drowning in the choppy waters of the Sea of Galilee, so too the People of God are drawn into the ark of the *one, holy, catholic and apostolic* Church. So important is entering into communion with our Lord and His People that Metropolitan Tikhon quotes Saint Cyprian of Carthage, who wrote: “You cannot have God as your Father if you no longer have the Church for your Mother.”

The Church is not an “organization,” nor is it a “place” to which we “go” to satisfy our spiritual or other needs. To the contrary, the Church is a living organism, the very Body and Bridegroom of Christ, made up of saints and sinners who struggle daily to embrace her as the fullness of the Kingdom of God, yet to be fully revealed, but already fully present in the life of the Church. As such, the Church is indeed one, holy, catholic and apostolic, and is firmly built upon four “pillars” that “provide some concrete expressions of, and reflections on, our mission as the Orthodox Church in America.”

### *Points to Ponder.*

1. What, according to Metropolitan Tikhon, is the “radical transformation” offered to us as “living participants” in the life of the Church? To what does this transformation call us? How do “we truly become members, not of an *organization*, but of a *body*: the One, Holy, Catholic, and Apostolic Church, whose head is Christ?”
2. What are the “eternal and unchanging marks of the Church?” What does it mean to say that the Church is “*one* and ‘breathes with one breath?’” In addition to our Lord, with whom are we called to commune? How do we make Christ “the beginning, the middle, and the end of our existence?”
3. The Church is *holy*, offering those who respond to her invitation to “come and see” the “path to sanctification” and holiness. How is this sanctification imparted by Christ? What role do the holy mysteries play in our sanctification? What is required of us as we pursue holiness? And how does our transformation assist in the transfiguration of creation and the world?
4. How does the Church, which is *catholic*, reflect the unity of the Holy Trinity? How do we manifest this catholicity in a personal way? What implications does this have in living a “genuine life in communion with our neighbors in a spirit of truth and love?”
5. What does it mean to say that the Church is *apostolic*? How do we share in the Apostles’ ministry today? What is essential if we are to participate in this ministry? How might we pursue becoming “images of Christ and vessels of the Holy Spirit” in our personal and community lives?
6. What is Metropolitan Tikhon proposing in his “Four Pillars?” How does the Church pursue the “healing of broken human beings?” What is meant by saying that “Christ alone, by becoming man while remaining God,” is the “Physician of souls and bodies?” By what means do we participate in this healing? How can we employ the “Four Pillars” as a framework for our Apostolic work today?

### *Coming to Terms.*

**Church.** The word “church” in Greek is *ekklesia*, which means “a gathering or assembly” or “called-out ones.” Hence, the Church is the *gathering of those who have been called* into union with Christ and with one another and who seek and embrace repentance while striving to live a godly life. The Church is *People – God’s People* – who gather for worship and fellowship while affirming their common faith in the risen Lord.

## *Pillar One: The Spiritual Life*

### *Something to think about.*



THE SPIRITUAL LIFE, WRITES METROPOLITAN TIKHON, “IS FOR EVERYONE, AT EVERY TIME AND IN EVERY PLACE.” While modern “spirituality” focuses on “inner wholeness,” “oneness with the universe,” and “transcendent love” – concepts not unknown in the Orthodox ascetical tradition – they find their “legitimate expression” only within a relationship with our Lord, within the community of His Body, the Church.

Metropolitan Tikhon goes on to observe that “the spiritual life is the foundation of our Christian experience.” Just as Saint Seraphim of Sarov observed that the goal of the spiritual life is the acquisition of the Holy Spirit, genuine spirituality “is the effort we make to prepare a small space in our hearts for the Holy Spirit to dwell... to make our own hearts receptacles for the Holy Spirit.” While in many ways this is an individual pursuit, it is only within the experience of the faith community that our lives must be rooted as the spiritual life is cultivated. And it is within the Church that we discover the tools necessary in this cultivation: the liturgical and sacramental life, by which we grow closer to God by participating in the Holy Mysteries; concern for promoting vocations to the ordained ministry and for the health and well-being of our clergy; prayer, both liturgical and private, which brings our hearts into closer relation with Christ; and the importance of theological education and formation for those who minister, whose words and actions are guided by the grace of the Holy Spirit.

### *Points to Ponder.*

1. How does the Church’s understanding of spirituality differ from the modern, worldly concept? In what do wholeness, unity, and love find their “legitimate expression?” Who is called to pursue the spiritual life?
2. Why did Saint Onuphrius the Egyptian “return to the world... to live among men?” How is every Christian called to “live as angels in this world?” What does it mean to “put on Christ” in every aspect of our lives?
3. Metropolitan Tikhon defines “community,” not as a forest of individual trees, but as “a single tree of which we are all a part.” What do the roots and trunk represent? What is the importance of the branches, as well as the leaves, fruit, and seeds?

### *Liturgical and Sacramental Life.*

4. Among the “many tools” at our disposal in cultivating the spiritual life, what “movements” do we encounter in the Church’s ascetical, liturgical, and sacramental life? Why is it “important for the Orthodox Church in America to maintain her identity liturgically,” and how is this being accomplished?
5. How is “beautiful Church music” a “powerful tool” in cultivating and sharing the spiritual life? How do the words and concepts expressed in the Church’s hymnography prepare others “to receive the things of God without their even realizing it?” What steps has the Orthodox Church in America taken to enhance the role of liturgical music? What additional steps might be further considered?

### *Vocations and Clergy Health.*

6. While “we must always have before us the example of Christ,” we must likewise recognize that pastoral ministry today “has been made more difficult by the many burdens and requirements” placed upon our clergy. How – and why – has the pastoral oversight of a community become “more difficult than ever?” Why

### *Coming to Terms.*

***Spirituality.*** Spirituality, according to the late Protopresbyter Thomas Hopko, is the “everyday activity of life in communion with God.” The term *spirituality* refers not merely to the activity of one’s spirit alone – mind, heart and soul – but it refers as well to the whole of one’s life as inspired and guided by the Spirit of God. Every act of a Christian – every thought, word, deed, activity of the body, and action – must be spiritual. This means that all that a person thinks, says and does must be inspired and guided by the Holy Spirit so that the will of God the Father, as revealed and taught by Jesus Christ His Son, might be accomplished.

Pages 20 through 29 continued.

is caring for the spiritual health of our clergy and their families increasingly important in our time?

7. What is our Lord's "priestly work?" How, and for whom, is it accomplished? What is the "common journey" upon which clergy and laity embark? How does fostering clergy health – physical, spiritual and emotional – impact the life of the faith community?

8. What steps has the Orthodox Church in America taken to respond to the need for encouraging vocations and maintaining clergy health? What additional steps might be further considered?

### ***Prayer.***

9. While a variety of practical approaches to involving the faithful in the life of the Church have proven to be fruitful, why must the inner work of prayer in the heart be promoted and fostered? How does this "promote a true and healthy understanding of the holy priesthood?"

10. In what ways is the monastic life "a model for all of us?" How does the life and witness of our monasteries inspire us in searching into our own hearts and in developing therein a genuine life of prayer?

### ***Theological Formation and Education.***

11. What is the difference between "those whose minds are filled within consequential thoughts and ramblings, on the one hand, and those whose words and actions are guided by the grace of the Holy Spirit?"

12. What is the "sacred task" of theological education? Where does theological education take place? What inspiration does it provide in our lives?

13. How do our seminaries approach this "sacred task?" What burdens do our seminaries face in fulfilling their mission? Beyond the spheres of theology and liturgy, what "skills" do they strive to impart? Beyond the seminaries, who is responsible for "the sacred enterprise of theological education?"

14. When should theological education begin? Why is theological education "a necessary component of the spiritual development of all Orthodox Christians that must be cultivated in the parishes" as well as theological schools?

15. In what ways is theological education and formation promoted in our seminaries? How might the faithful further nourish the work of our seminaries and monasteries? ■

### ***Enduring Goals.***

On page 29 of *Of What Life Do We Speak*, Metropolitan Tikhon proposes four areas of the spiritual life that deserve our close attention:

■ Establishing and sustaining Christ-centered parishes and communities that reveal the beauty of God's Kingdom liturgically, sacramentally and ascetically while encouraging training in and the application of the sacred arts.

■ Nurturing vocations to the ordained ministry while fostering the spiritual, emotional, physical and financial health of our clergy and their families.

■ Inspiring monastic vocations and encouraging, supporting, and fostering an appreciation of the cenobitic life.

■ Forming a comprehensive, unified North American system of Orthodox Christian theological education as the "backbone" of our Church schools, seminaries, and adult education programs.

Prayerfully consider each of these goals. How might you contribute to their pursuit and fulfillment? How might your parish focus more intensely on promoting these important aspects of the spiritual life?

Participants in study groups or classes may be divided into four smaller groups, each of which may explore one of the goals. After collective reflection and discussion, each group should be asked to share its findings and recommendations with the entire class.

## *Pillar Two: Stewardship*

### *Something to think about.*

**W**HEN WE THINK OF “STEWARDSHIP,” WE OFTEN FOCUS OUR ATTENTION ON MATTERS OF FINANCE. Indeed, stewardship involves the wise use of our treasures, in addition to our time and our talents. But Metropolitan Tikhon offers a far broader definition, one by which he proposes that the very “foundation of genuine stewardship” is found in “caring for our broken and hurting fellows, all of whom, like us, are made in the image and likeness of [God’s] glory.”

Stewardship, as Father Alexander Schmemmann observed, involves the “act of blessing God, of both receiving the world from God and offering it to God.” As such, we pray before the *Epiklesis* during the Divine Liturgy – “Thine own of Thine own, we offer unto Thee, in behalf of all and for all” – which reminds us of our calling as “servants of Christ and stewards of the mysteries of God” [1 Corinthians 4:1]. As stewards, we are more than mere “managers” of God’s manifold gifts; rather, we are challenged to reach out to those who are broken, broken down, and wounded and, in so doing, giving value to their existence in our effort to tend “as a garden planted by God Himself,” as Metropolitan Tikhon notes.

### *Points to Ponder.*

1. Metropolitan Tikhon observes that “stewardship is the application of our spiritual life to the realities of the fallen world” in the quest to heal all of creation, including ourselves. How do we become “true human beings and, by God’s grace, saints?” How is it that we can consider the Church as a “hospital for the souls of all who are broken, beaten down, or wounded?”
2. As stewards, how do we bring healing and transfiguration into the world? What, especially, is our “duty” to others with regard to giving “value to their existence?” In so doing, how do we authenticate our own humanity? In what ways did the saints of North America exhibit this in their lives and ministry, and why is it essential that we, as stewards, accept responsibility as “guardians of this witness” and patrimony?

### *The Human Person and the Family.*

3. How does Metropolitan Tikhon characterize human life in our time? What does he mean when he writes that “the human person has been reduced to an avatar?” How have today’s “movements and causes” failed to address the “deeper longing for genuine personhood” and the “recognition that the purpose of the incarnation and the economy of Christ is for all human beings to find healing in Christ and to become truly human?”
4. Metropolitan Tikhon observes that in today’s climate, we struggle with an ever-growing number of addictions, distractions, and temptations. How do these make it difficult to know who we are as persons? How do public debates on these and related issues impact our communities, and especially our families?
5. How does Metropolitan Tikhon define “salvation?” How have “acceptance and examination” been inspired by Christ through the Holy Spirit? How is this nurtured in the life of the Church?

### *Creation and the Environment.*

6. What characterizes the relationship of humans to the creation? What was the “primary task” of the first created man? How, according to Saint Symeon the New Theologian, did creation respond to man’s fall?

### *Coming to Terms.*

**Stewardship.** In Psalm 24:1-2 we sing, “The earth is the Lord’s and the fullness thereof, the world and those who dwell therein; for He has founded it upon the seas, and established it upon the rivers.” Herein we find the key to the meaning of *stewardship*.

Everything that exists, everything with which we have been blessed by God, is a gift to us. While these gifts belong to the Lord, they are given to us as *stewards* to manage and, ultimately to offer back to Him in thanksgiving. “As each has received a gift, employ it for one another, as good stewards of God’s varied grace,” we read in 1 Peter 4:10.

Hence, *stewardship* typically is defined as the wise management and use of that which we have received from God “in order that in everything God may be glorified through Jesus Christ [1 Peter 4:11].

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7. How do the hymns of the liturgical year reflect creation in relation to the Creator and humanity? How is “the renewal of creation” dependent on the “renewal of mankind?” Why is the healing of our own bodies and souls essential before we can properly steward creation? What is the relationship between the renewal of creation and the renewal of mankind?

### ***The Saints and the History of the Orthodox Church in America.***

8. Who are the “greatest benefactors of the Orthodox Church in America?” How does the witness of the saints provide inspiration to us today?

9. Why is “community” essential in realizing unity in Christ? What does it mean to say that “to become more fully in the image of God means to strive for sanctity?” In addition to accepting our call as stewards, how should we accept our call to become “real saints?”

10. What can we learn from our parishes’ histories? How do they relate to the broader “story” of the Church and salvation?

### ***Financial Stewardship.***

11. What needs do we address through our wise use of the treasures with which God has blessed us? How is wise financial stewardship essential on all levels – parish, diocese and beyond? What do we express through “sacrificial giving?” How can we, as individuals and parishes, strengthen our commitment to financial stewardship? ■

### ***Enduring Goals.***

On page 39 of *Of What Life Do We Speak*, Metropolitan Tikhon proposes four areas with regard to stewardship that deserve our close attention:

- Addressing human brokenness by assisting in the healing of the human person, the strengthening of the family, and the alleviation of human suffering.
- Caring for the environment by recognizing the beauty and importance of God’s creation; embracing the needs in our neighborhood, parishes, and dioceses; and deriving inspiration from our monastic communities.
- Learning our history and patrimony as the Orthodox Church in America, the witness of the many saints who labored on this continent, and the sacrificial efforts and legacy left by our ancestors.
- Nurturing a healthy culture of financial stewardship on multiple levels to enhance pastoral ministries in transfiguring the world.

Prayerfully consider each of these goals. How might you contribute to a better understanding and practice of stewardship? How might your parish focus more intensely the various aspects of stewardship noted by Metropolitan Tikhon?

Participants in study groups or classes may be divided into four smaller groups, each of which may explore one of the goals. After collective reflection and discussion, each group should be asked to share its findings and recommendations with the entire class.

## *Pillar Three: Relations with Others*

### *Something to think about.*

**O**NE OF THE CHURCH'S MOST BELOVED HYMNS, SUNG AT FUNERAL AND MEMORIAL SERVICES, COMPARES OUR EARTHLY LIVES TO A SHIP FACING STORMY WATERS. "Beholding the sea of life," we sing, "surging with the storm of temptation, and taking refuge in Thy calm haven, I cry unto Thee: Raise up my life from corruption, O greatly merciful One!" We live in a fallen world, one in which the "sea of life" is indeed quite choppy, filled with an endless array of temptations that challenge us to look beyond life's tragedies, travesties, and injustices while seeking refuge in the "ark of salvation" – the Body of Christ, the Church. This is especially the case in our time, when hardly a day passes without reports of yet another killing, beating, overdose, attack, or potential global conflict. At the heart of such dissonance is the difficulty often endured in maintaining loving and godly relationships with one another – a "storm" mankind has faced since Cain, in his jealousy, committed the first murder.

Many have grown numb to life's stormy waters, preferring to wall themselves off from tragedies and the real fears that accompany them. In so doing, they wall themselves off from others, isolating themselves from their "fellow citizens with the saints and members of the household of God." But, as Metropolitan Tikhon writes, humility is essential "to navigate the stormy sea of this life" without embracing "the negative spirit of this age" or its opposite – "a superficial quest for love and peace in the world" – neither of which can restore, much less maintain and strengthen, the "right relationship" with our Creator and, through Him, one another.

### *Points to Ponder.*

1. Metropolitan Tikhon notes that in recent decades, popular expressions of the need for unity abound, but have failed to produce any real results. What obstacles to love and unity do we encounter today? What does our Lord say about unity in His great high priestly prayer in John 13-17? How are unity and love central to the Kingdom of God and in the lives of God's People?
2. How is the Cross central in ordering our relations with others? In what must we be rooted if we aim at reaching out to those who have yet to embrace Christ? Where, according to the Encyclical of the Holy Synod of Bishops of the Orthodox Church in America, does one discover "genuine Christian unity?"

### *Culture and Society.*

3. In what ways has the Church always been in "an ambiguous relationship with the cultures and societies within which she sojourns?" What tensions are inherent in this relationship? What does Metropolitan Tikhon mean when he writes that "every stand that we take as a Church carries political implications?" Why is it crucial for the Church to participate in public debate and discourse? In what spirit must such discourse and debate take place?

### *World-wide Orthodoxy.*

4. How does the Orthodox Church in America understand herself as she approaches the 50th Anniversary of the reception of the Tomos of Autocephaly in 1970? What

### *Coming to Terms.*

**Relationship.** It is often said that one cannot be a Christian in isolation from others. If we are condemned, we are told, it is as individuals; if we are saved, it is within a community, the Church. And, as a "community," the People of God are called to embrace and maintain the "common unity" of faith in love shared by every member of His Body, the Church. Christ took on our human nature in its entirety for one purpose: to restore the "right relationship" with our Creator, tainted through the sin of our first parents, while restoring that same relationship with one another. As Saint Paul reveals in Romans 12:5, "we, though many, are one body in Christ, and individually members one of another."

Whereas the nature of our fallen world divides and isolates, our Lord unites, revealing His plan for those who once were "no people," but now have been called to become "God's People" [1 Peter 2:10]. Just as the three divine persons of the Holy Trinity are perfectly united into one Godhead through their supreme love for one another, so too we are called to love one another, even as God loves us.



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characterizes the OCA's status as an autocephalous Church? How has the OCA committed herself to realize the goal of Orthodox Church unity in North America? How does the late Archbishop Dmitri of Dallas describe the autocephaly of the OCA and her purpose?

5. How does the Holy Synod of Bishops of the Orthodox Church in America view the ultimate resolution to the current situation of Orthodox Christianity in North America? Why is this important not only on this continent, but globally? How does the Primate of the OCA maintain the unity of the faith with the other Local Orthodox Churches, and why is this a priority?

### ***Orthodoxy in North America.***

6. What, from its inception, has been the "desire and vision" of the Orthodox Church in America? How has the Holy Synod of Bishops participated in the work of the Assembly of Canonical Orthodox Bishops of the United States of America and the Assembly of Canonical Orthodox Bishops in Canada?

7. What steps is the Holy Synod of Bishops prepared to undertake in promoting the unity of the Church? How can pan-Orthodox cooperation be fostered and strengthened through inter-jurisdictional co-operation on the parish and broader levels?

### ***Ecumenical Interfaith, and Civic Relations.***

8. What does Father Alexander Schmemmann see as "a surrender to secularism?" What tensions are present in considering the degree to which Orthodox Christians should participate in ecumenical and inter-faith dialogues? What in part is the cause of the weakness of the present state of ecumenical dialogue? What must be the character of our participation in such gatherings, well beyond mere "superficial participation" and presence, in firmly proclaiming the authentic faith of our fathers?

9. What does Archimandrite Vasileios say concerning "progressives" and "conservatives," and what truly decides the authenticity of our faith? How do we preserve and proclaim the truth beyond the walls of our communities? How does this relate to our interactions with civil authorities, institutions, and the governments of the nations in which we sojourn and minister? ■

### ***Enduring Goals.***

On page 46 of *Of What Life Do We Speak*, Metropolitan Tikhon proposes three areas with regard to the Church's relations with others:

■ Radiating the humility, peace, and love of Christ to our surrounding culture on the international, nation, local, and personal levels while addressing every issue that faces our communities with patience, truth, and compassion.

■ Upholding, with steadfast humility, the vision of the Orthodox Church in America for the canonical structure of the Church on this continent; strengthening our relations with other Local Orthodox Churches around the world; and participating actively in pan-Orthodox endeavors such as the Assembly of Bishops process.

■ Prioritizing our participation in ecumenical bodies while maintaining faithfulness to Orthodox Christianity by presenting a worthy witness to the Gospel in religious and civil/governmental arenas.

Prayerfully consider each of these goals. How might you and your parish contribute to their realization? What pan-Orthodox opportunities exist in your area and how can they be used to proclaim the fullness of faith?

Participants in study groups or classes may be divided into three smaller groups, each of which may explore one of the goals. After collective reflection and discussion, each group should be asked to share its findings and recommendations with the entire class.

## *Pillar Four: Outreach & Evangelism*

### *Something to think about.*

**I**N PROVERBS 29:18 WE READ, “WHERE THERE IS NO VISION, THE PEOPLE PERISH.” As Metropolitan Tikhon notes, the final Pillar – Outreach and Evangelism – is impossible to implement without effort in the preceding three Pillars, which indeed provide the “vision” for the fulfillment of the Apostolic work of the Church in North America. And, at the heart of our vision of this evangelistic work stands the Gospel of the risen Christ, the “Good News” that every member of the Body of Christ is called to proclaim to and share with any and all who would receive it.

Metropolitan Tikhon notes that since 1794, Orthodox Christianity in North America has experienced “positive development and growth,” especially in recent times. Yet continuously evolving challenges, spanning major demographic shifts to changing attitudes with regard to religious faith and practice, have emerged, leaving us to wonder precisely how we should implement the evangelistic vision and proclamation. Relying on programs, often inspired by non-Orthodox Christian confessions and often designed to bring about numerical growth – often at the expense of a clear vision of spiritual growth – confront us. As Metropolitan Tikhon points out, “none of those strategies and programs will be effective if they are divorced from the spiritual and liturgical life, and if they do not serve to convey and share the reality of the healing that we have received in Christ.” Ultimately, outreach and evangelism can only keep us from perishing if we become genuine persons in the image of Christ, if we exercise good stewardship of God’s gifts and blessings, and if we live as brothers and sisters in Christ in community.

### *Points to Ponder.*

1. Why is the Fourth Pillar the final Pillar? How are the Four Pillars interdependent? How is the “vision” offered by the first three Pillars implemented and fulfilled through outreach and evangelism?

### *Philanthropy and Social Responsibility.*

2. Why must we not confine our Apostolic work to mere recruitment and expansion? Why is the often heard sentiment to “make North America Orthodox” self-serving, negative and almost violent? Why must embracing the fullness of the faith be “voluntary?”

3. Why is spiritual growth “the key to numerical growth?” In what ways does this involve “a sacrificial effort?” How does prayer relate to “concrete action” in proclaiming the Gospel? What concrete actions are enumerated in Matthew 25:31-46? Who is responsible for implementing these actions? And how might the ministries implied in Matthew 25 best be addressed through local community outreach and pan-Orthodox efforts?

### *Youth and Young Adults.*

4. While there are those who would define the Church’s younger members as “the future of our Church,” Metropolitan Tikhon states that they are “in the forefront of the realities of a changing world,” very much a part of the Church’s “present” experience. What do we need to hear from them? How have we failed to provide our youth with the intellectual, emotional, and spiritual nourishment necessary “to face the world, let alone find life within the world?” Why is it crucial for adult Church members “to grasp fully what it means to be a person in the image and likeness of Christ” in order to help our youth find healing and salvation?

### *Coming to Terms.*

**Evangelism.** The very heart of our faith in the Living Word of God is revealed in the written words of Holy Scripture, and specifically in the Gospel, or “Good News.” The Gospel is not something that we “keep to ourselves,” in a quest to “preserve” that which, in reality, “preserves us.” As such, proclaiming the Good News – in a word, *evangelism* – is not simply an “option” for Orthodox Christians; rather, it is how we fulfill our Lord’s injunction to “go ye therefore, and teach all nations, baptizing them in the Name of the Father, and of the Son, and of the Holy Spirit; teaching them to observe all that I have commanded you; and lo, I am with you always, to the close of the age” [Matthew 28:19-20].

It is God “Who desires all men to be saved and to come to the knowledge of the truth” [1 Timothy 2:4]. And it is God Who has equipped us to carry out this mission to one and all who would embrace the Living Word of God and the salvation He freely offers to “all mankind.”

Pages 47 through 53 continued.

5. Where does outreach and evangelism begin? What does Metropolitan Tikhon mean when he writes, “education in the Faith is part of the life-long process of theosis?” In what ways can our youth – and faithful of all ages – strengthen their personal faith? How is “being anchored in the faith” vital to remaining in the Church, “the ark of salvation” in which we seek refuge in the midst of life’s storms?

6. In what experience is the entire historical existence of the Church founded? How does the witness of the saints, martyrs, confessors, and ascetics instruct and inspire us, and why do we often “become paralyzed” when we attempt to emulate them? How might we introduce our youth to this experience? What is our “collective goal” in this regard? And how might the development of local youth ministries enhance the evangelization of our youth?

### ***Communications.***

7. What does Metropolitan Tikhon mean when he writes, “communications is one of the mysteries of our human condition?” How does missionary work intersect with communications? Rather than relegating communications to “modern technology,” what must we reflect in our evangelistic efforts? What is it that we seek to convey? And to whom?

8. What must the Church “invest” in order to effect good communication? How might we serve as “conduits for the truths of the Gospel” in order to “fill all the space with Orthodoxy,” to quote His Holiness, Patriarch Kirill of Moscow?

### ***Mission Planting and Parish Revitalization.***

9. To what are mission communities, as well as established parishes, called to do with regard to outreach and evangelism? Rather than “give up on growth,” what must established parishes – as well as recently planted communities – do to evangelize, both within their own walls and beyond? What results should *not* be expected from “plans and programs,” essential as they may be? Ultimately, who is responsible for evangelizing, and how does it reflect our “responsibility to live our life in Christ to the fullest within the beauty of our faith? ■

### ***Enduring Goals.***

On page 53 of *Of What Life Do We Speak*, Metropolitan Tikhon offers four areas with regard to the Church’s outreach and evangelism efforts:

- Reaching out to those in need, within and outside our parishes, through the effective ministries offered by Christ and the Holy Gospel.
- Calling upon our young people to be examples of missionary zeal and apostolic ministry.
- Effectively communicating the Gospel by our words, deeds, and silence while managing our internal and external communications to reflect the truth and compassion of Christ.
- Planting and preserving communities of all sizes and ages as havens in which human beings might blossom.

Prayerfully consider each of these goals. How might you and your parish establish and expand its outreach and evangelism ministries? How might this be especially pursued in ministering to youth and young adults in your community?

Participants in study groups or classes may be divided into four smaller groups, each of which may explore one of the goals. After collective reflection and discussion, each group should be asked to share its findings and recommendations with the entire class.

Pages 54 through 56.

## ***Conclusion: The Prophetic Way of the Church***

### ***Something to think about.***



THE “VISION” TO WHICH WE ARE CALLED IN PROVERBS 29:18 IS A PROPHETIC ONE. While often revealing events yet to be fulfilled, the prophets were intent of calling God’s People to faithfulness – to God, to His plan of salvation, to living a life in which the creature mirrors and reflects the Creator in Whose image all were made. Pursuing “the Prophetic Way” is synonymous with pursuing our Apostolic work to bring people “into the presence of Christ.” And in order to realize this goal, we first must “live a life of communion with Christ, in sanctity of life, with love towards our neighbor, and with zeal for the mission of the Gospel.” Without this vision, “we the people” indeed will “perish.”

### ***Points to Ponder.***

1. How did Father Alexander Schmemmann characterize the life and ministry of His Eminence, the late Metropolitan Leonty? What “polarizing tendencies” did Metropolitan Leonty find “alien?” How might we exercise a prophetic witness to one another, as well as to those who have yet to hear the fullness of the Gospel?
2. How do Archimandrite Zacharias and Saint Gregory the Great understand “prophecy?” How are these understandings reflected in the life of Metropolitan Leonty? Why may we consider him “a true prophet?”
3. Why is it that we cannot contribute to the life of the Church if we have not “grafted ourselves” to her? What is crucial with regard to living “a life of communion with Christ, in sanctity of life, with love towards our neighbor, and with zeal for the mission of the Gospel?”
4. What, according to Metropolitan Tikhon, is seen as the importance of Father Alexander Schmemmann’s classic work, *For the Life of the World*? What is the “middle way” he traces? How can we, “through a deep abiding with Christ in our hearts,” stand on the firm rock of faith in order to “make a small contribution to the questions and problems of the world?” ■

## *Chancellor's Report to the Metropolitan Council*

February 13-15, 2019

**1. General Introduction.** I report now to this body for the first time as Chancellor of the Orthodox Church in America, a position I have held for a little under a month and a half. In this time, I have attempted above all to learn the position, discern the rhythms of work at the Chancery, and do the necessary work. This present meeting provides one more lesson for me as I assume more fully the responsibilities of the Chancellor.

**1.1. Rhythms of Work.** Over this past month and a half, His Beatitude and I have begun developing patterns for working together. Typically we meet at least once a day, usually in the morning, and review the diverse matters that need to be addressed at the Chancery. I aim to arrive early in the morning, around 8-8:15 am, so that I have a chance to prepare an agenda for these meeting and organize my day, noting carefully tasks that need to be followed up. After we meet, I spend my day attending to matters that arise out of these meetings, or are in response to others, and which are outlined below in the report that follows.

**1.2 Learning the Rhythms.** As soon as I began work as Chancellor in January, I started meeting with each member of the Chancery staff to find out about them, their work, and their expectations of me as Chancellor. At this point, I have completed a meeting with everyone except for a full meeting with Mr. Alexis Liberovsky. These meetings have been initial encounters, preliminary in nature. I did not come to the Chancery as an unknown person in January, but I have felt it important to reacquaint myself to everyone working at the Chancery in my new capacity, building upon and establishing new patterns of relationships. Furthermore, I hope to have a new round of meetings with everyone and establish job descriptions, goals, and ask everyone to recommit themselves to working for the Church.

**1.3 Developing Rhythms.** Moving forward, in my position as Chancellor, I plan to foster amongst those who labor at the Chancery a sense of service, stewardship, good order, and hard work. Above all, I hope to lead by example, but I will not hesitate to cajole, exhort, remind, nag, and restate these four points again and again. Embedded in them are the strategies and tactics necessary to carry out the work of the Church. All of us who work for the Church are ultimately servants of the Church, the Body of Christ. We cannot in any way lose sight of this basic presupposition. If we do, we lose sight of the very Master

whom we serve, made manifest in glorious splendor by the Church. Further, we are stewards of the precious and sacred gifts that are given to the Church. In our work, there is obviously no place for deceit, conceit, or corruption. The canonical mandate is for transparency, financial integrity, and careful expenditure of the gifts given to the Church to facilitate its operation, which is, as I have said, to be of service to the Church. The manner in which we can faithfully accomplish our tasks is through the good order commanded to us by the holy Apostle. I note carefully that this call to good order is not a call to order for the sake of order, but the conviction that the good order in the Church is the order that emanates from the heavenly realms down to the holy Church, and then back up to heaven. Practically this means that working in the Church requires us to be mindful of and attentive to Church practice and traditions. For example, the canonical tradition expects that I assist the metropolitan in carrying out the decisions of holy synod and serving as a trusted advisor to him. Good order also requires that I both assure that all members of the Chancery work towards this goal, but that I – we – assume an adversarial role, if necessary, in matters of stewardship. Finally, serving the Church faithfully, being attentive stewards, doing everything “decently and in good order,” means that we must be willing to work hard. Hard work means nothing less than showing up to the office, answering the phone, responding to emails and mail, contributing to the solution of problems, carrying out tasks given to us by the metropolitan, the holy synod, the All-American Councils, and indeed this very body in a timely, accurate, and correct manner.

**2. Chancery Reorganization and Transitions.** Chief among the tasks that have occupied my time has been the ongoing work of Chancery Reorganization, and managing the transitions that I anticipate will take place over the course of this year.

**2.1 Reorganization.** His Beatitude has already reported on some of the formal steps that have been taken in the Chancery reorganization. Fr. Timothy Hojnicky has updated the Metropolitan Council on the meetings of the ad hoc Chancery Restructuring Committee that have taken place. In addition to what Fr. Timothy reported, I can update the Metropolitan Council as follows:

**2.1 Finance Office.** In December 2018, we posted a job advertisement on oca.org for the position of the Treasurer of the Orthodox Church in America. In January 2019, we reposted the position, because no fully suitable candidate had applied. When the Restructuring Committee met in January, it was concluded that

something different had to be done with position. In consultation with that group, as well as the current treasurer, and John Skrobat, a member of the Internal Auditing Committee, His Beatitude decided to divide the Treasurer position into two, part-time positions: a Treasurer, and an Accounting Manager. The Accounting Manager will be the onsite person, responsible for daily bookkeeping and accounting operations. This person would work 3-4 days per week and report to the Treasurer. The Treasurer would have oversight responsibilities over the Accounting Manager; would review monthly bank and investment reconciliations; would produce the quarterly Treasurer Reports to be published online; would present the financial report to the Metropolitan Council and Holy Synod. We have made an offer to a superbly qualified individual to become the Accounting Manager, and we are in discussions with a qualified person to become the new Treasurer.

**2.2 Chancery Administrator.** As Fr. Timothy indicated, at that same meeting in January 2019, a job description was finalized for a position entitled Chancery Administrator. The person filling this role will succeed Fr. Eric as corporate Secretary of the Orthodox Church in America, with some similar tasks, but with a new reporting structure and new responsibilities. We are in talks with one individual, highly recommended by those in the Church, about assuming this position, but we are in the preliminary stages of this conversation. We hope to have a smooth and seamless transition from Fr. Eric to the new hire over the course of the late-Spring.

**2.3 AAC Manager.** Based on the recommendations of the Restructuring Committee, His Beatitude and I are developing a job description, with Fr. Eric's input, for a new stipend position, an All-American Council Manager. The person who will fill this role, we are already in discussion with someone about it, will oversee the planning and logistics for the councils in the period between councils. At this point, planning for conventions and congresses is more and more extensive, requiring us to start this process earlier than we have done before. Hence, the need for this position. The stipend for this position will be drawn from the All-American Council surplus.

**2.4 Further transitions and a review of OCA Department, Boards, Offices, and Commissions.** Beginning next week, I plan to begin a review the work of all Departments, Boards, Offices, and Commissions. My initial examination leads me to believe that some of these groups should continue their work, some can be consolidated, some need new leadership, and some need revitalization. Fr.

Eric has passed on work that he has initiated, for which I thank him, and which I intend to use a blueprint for this review. Finally, I anticipate that the Chancery will see further transitions this spring and summer. The challenge facing His Beatitude and me will be to discern whether we should replace or consolidate these positions, if they come open.

**3. External Relations.** In my time at the Chancery so far, I have assisted His Beatitude on a number of matters relating to External Relations. In particular, I accompanied him as part of the official delegation on his official visit to Moscow for the celebrations of the tenth anniversary of the enthronement of Patriarch Kirill. Questions regarding relations with other Orthodox Churches regularly form part of our meetings and work together.

**4. Ongoing work and Looking Ahead.** Much of my day-to-day work revolves around routine matters involving clergy, their transfers, releases, and acceptances. Specifically, this work involves the maintenance and updating of the personnel files. In this, I am aided greatly by Mr. Barry Migyanko. As Ms. Cindy Heise will also report, there are a handful of cases regarding misconduct that requires attention. In addition to this routine work, I am also working on the following:

**4.1 Clergy Review.** At this point, I have written a letter to all members on the catalog of Stavropegial clergy, introducing myself as the new Chancellor. Together with His Beatitude, I look forward to taking the next step with this group of clergy and offering my assistance in their work in any way that I can. I also plan on looking through this catalog and confirming the status of clergy on it.

**4.2 Statute Compliance.** Along with all the work I have outlined in this report, I am keen to see that the revised Statute is in place throughout the Church at all level. With this in mind, I will ask this body to commission a census of Statute compliance at all levels of the Church. Once completed this census will be forwarded to the Holy Synod with recommendations for possible action.

**5. Conclusion – a Personal Word.** A final word here is order about my current status. For the course of this semester, in conjunction with my position of Chancellor, I also remain a priest and professor at St. Vladimir's Seminary. My family and I still live in one of the seminary houses. With the blessing of His Beatitude and the permission of Fr. Chad Hatfield, president of St. Vladimir's, we will remain there until the end of the school for my two children. After they are finished with their school year, we will move closer to the Chancery and I



will take up canonical assignment at St. Sergius Chapel. Until that time, I ask for patience as I navigate a lengthy commute, numerous demands on my time and attention, a steep learning curve for a job that has no instruction manual.

Proposed motion:

The Metropolitan Council recommends that the Chancellor of the Orthodox Church in America undertake a survey of the governing documents of all Dioceses, Parishes, monasteries, institutions, offices, and organizations of the Church in order to determine the level of their compliance with the Statute of the Orthodox Church in America. The Chancellor is to report on this matter to the Holy Synod of Bishops at their Fall 2019 session, and, if necessary, provide recommendations for possible action.

# February 2019 ORSMA REPORT

## I. ORSMA STATISTICS 2015- PRESENT

A. See attached spreadsheet

## II. Coordinator activities

1. Continue to integrate each diocese into the central background check process and provide ongoing support to diocesan administrators.
2. Assist OCA Secretary in running background checks
3. Continue to coordinate online trainings for the prevention of sexual abuse of children.
4. Advise seminaries on policies concerning sexual misconduct and best practices for prevention.
5. Continue to serve as secretary for SMPAC meetings.
6. Maintain ORSMA Database and files.
7. Conduct inquiries into new reports of alleged sexual misconduct which involves speaking to respondents, complainants, and necessary parties. Obtain feedback from ORSMA consultants to determine the direction of a case.
8. Joined the Pastoral Life Department to address issues of prevention.
  - a. Attend monthly meetings
  - b. Ongoing project: interview clergy wives concerning their experience in ministry and specifically address challenges such as burnout

## SEXUAL MISCONDUCT POLICY ADVISORY COMMITTEE (SMPAC)

### Report to the Metropolitan Council

February 14, 2019

**Members:** Metropolitan Tikhon (*ex officio*), Archpriest Alexander Rentel (*ex officio*, Chancellor, Chair), Archpriest Eric Tosi (*ex officio*, Secretary), Archpriest Alexander Garklavs, Protodeacon Peter Danilchick, Mrs. Cindy Heise (*ex officio*, Social Worker and Coordinator, ORSMA, Secretary of SMPAC), Mr. Robert Koory, Esq., Dr. Albert Rossi (NYS licensed psychologist), Mr. Bernard Wilson (Chief of Police, Retired).

#### **SMPAC Charter**

The Sexual Misconduct Policy Advisory Committee (“Committee”) was created by Metropolitan Jonah on January 28, 2010 to work with and assist the Office of Review of Sexual Misconduct Allegations (“Office”). The Committee was initially known as the “Sexual Misconduct Allegations Review Committee.” The Charter remained in effect during this time. The Charter was again reviewed and approved by the Holy Synod of Bishops at the Fall 2013 meeting.

#### *Authority, responsibility and supervision*

The Committee is under the authority of the Holy Synod and is chaired by the Chancellor of the Church, who is the day-to-day supervisor of the Office. The Committee operates in an advisory capacity only and does not assume any responsibility for the handling of sexual misconduct allegations, because that responsibility properly belongs to the Diocesan Hierarchs and the Office, according to the revised *Policies, Standards, and Procedures on Sexual Misconduct*. Committee members are appointed by the Holy Synod of Bishops.

#### *Background*

The complexity of sexual misconduct allegations requires a multi-dimensional awareness of issues and skills in various disciplines, so that allegations of misconduct may be considered from several perspectives—spiritual, ethical, legal, clinical as well as pastoral. Overlapping and interrelation between these disciplines can best be addressed by a team approach, such as via a standing advisory committee to assist the Holy Synod of Bishops and the Office.

#### *Duties*

- Provide advice on how to improve both the content and effectiveness of the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct*.
- Assist in reviews of the extent to which the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct* are implemented in practice and how compliance with them is ensured.
- Assist in finding and nominating qualified professionals, who would be called on to do investigations when occasions arise.

- Assist in developing increased and improved training for clergy, Church employees, and applicable laypersons to enable a better understanding of their duties under the revised *Policies, Standards and Procedures on Sexual Misconduct*, including their mandatory reporting obligations under various state laws.
- Assist in any other requests for advice made by the Holy Synod of Bishops and the Office.

#### September 2018

- There was discussion of having a Compliance Officer in each diocese to help improve OCA compliance with the PSPs (background checks, training, etc.)
- There will be a reorganization of the chancery along with a new Chancellor to be appointed at the end of the year and to start January 1, 2019

#### October 2018

- Some dioceses continue to demonstrate poor compliance with background checks
- Proposal for a Clergyman & Clergy Family Care (CCFC) Officer to support clergy and their families experiencing crisis or personal difficulty which impacts their ministry

#### November 2018

- An old case of misconduct was found in a priest's file, but, there is no documentation of the resolution. It was recommended that a full review of all clergy files be conducted to determine if there are other instances of unresolved misconduct cases.
- It was also suggested that a review of Diocesan files be done since they do not mirror OCA files

#### December

- Discussion of the future of SMPAC meetings. Frequency will likely reduce to once a quarter. Any additional meetings can be requested by any of the SMPAC members if an important issue arises before the scheduled meetings.
- SMPAC members agreed that an in person meeting should take place once a year
- New members should be sought in the event older members would like to retire
- A review of the PSPs may need to be reviewed in light of "lessons learned" the last few years.

**Secretary's Report**  
**Archpriest Eric George Tosi**  
**Fall 2019 Metropolitan Council Meeting**  
**February 13 to February 15, 2019**

**1. Overview**

Since the last meeting, there have been a number of projects moving forward as I complete my term as Secretary of the Orthodox Church in America. Among the high priorities are the Archives project and the Website refurbish project. Other tasks continue as we begin the transition.

As always, I want to extend my deepest gratitude for the staff in the Chancery and the Communications Team. They work long hours, are dedicated to the Church and provide endless support to the operations of the Metropolitan, the Officers and the Church. Please remember to express your thanks to them whenever possible.

**2. Human Resources**

The annual timesheets were received and new timesheets sent out for the year. The Chancery holidays for 2019 were also sent out. I would recommend a full and complete revision in the Employee Handbook which will reflect the changes in the Chancery operations as well as the numerous policies that were implemented since they were last issued in 2009.

**3. Administrative Policies**

There was one major administrative policy that was worked on with Fr. Alexander Rentel and Judge E. R. Lanier. This is in regard to access to personnel files at the Chancery. After an examination of both Federal and State regulations concerning personnel files as well as Church administrative needs, we are presenting the proposed policy for adoption. It is critically important that the Church maintains strict control over the personnel files in order to protect the operation of the Chancery and the confidentiality of the material contained in the files.

Also note that the new Social Media Guidelines require some action in regards to Social Media Code Conduct which needs to be signed by all employees and volunteers with the Central Church Administration. Dioceses are encourage to adopt similar guidelines.

In addition, the new Sexual Harassment law of New York State will require all New York State entities (including the Chancery and stavropegial institutions residing in New York State) to undergo sexual harassment training over the next year in order to be in compliance with the new law.

**4. Information Technology**

The new chancery database is close to being completed and is being worked on in conjunction with the website refurbish. This is because some information from the database feeds the website (such as clergy and parish information). The database will also be able to generate custom reports for the chancery staff. Much of the work has been on the back end of the database as information is migrated to a new format and system. The goal is to have this completed and working by Pascha.

As always, hardware in the Chancery is used to the end of its life (and sometimes far beyond) so there will be the need over the coming years to upgrade computer systems, server, modems and routers. Rich Tirpak of Sinpak Systems has been handling much of this for many years and is greatly trusted. Budgeting should be considered for these upgrades over time so there is no large need when systems crash. Recently the server for the finance office crashed and had to be replaced.

It is recommended that we do not renew the Pitney Bowes contract (due in July) for the stamp machine but rather got to Stamps.com which will perform the same service and save the Chancery thousands of dollars. The copiers/fax machines are currently fine and do not need to be renewed for a few years.

## **5. Operations**

I continue to work on Chancery operations. The normal rounds of meetings, planning sessions and simply doing the business of the Church can fill the schedule very quickly. As the Secretary of the Church, my main duties lie in planning, administration and management of the many areas for which I am responsible. It would difficult to recount the many issues that are dealt with on a daily basis but they are handled quickly and efficiently. The 501 C 3 master list continues to be updated and submitted in a timely manner and I continue to work with a number of parishes on their status.

We have a few insurance issues relating to legal threats over the past few months. These will be detailed by the General Council and the Legal Committee. I report any potential threats immediately and make contact with our adjusters. For now all the potential threats are reported and the insurance company is ready to act if the threats move from potential to reality. There were two accidents by the truck being driven to the All American Council in St. Louis. Both of these were covered by the insurance.

While I will not go into detail about legal work, as that will be reported separately, I would note that there continues to be strong cooperative effort with the General Counsel and the Legal Committee. There were a few legal issues that were worked through which involved areas as diverse as contracts to threats of legal action. Enclosed is the new Personnel File Policy which is recommended to be put in place which restricts the access to personnel files maintained at the Chancery due to the sensitive material found in the files. This has been worked on with the Chancellor and the General Counsel.

Other operations include the disbursement of relics, antimimension and chrism from the Chancery repository to diocesan hierarch and parishes with the blessing of His Beatitude. There is a clear system in place and a record of these disbursements.

## **6. Councils and Synods**

The normal course of meetings continues as a primary responsibility. I would remind people that I do try to get request for reports out very early and ask cooperation as we try to get these reports out in a timely manner. There is often much background work that goes into preparing them for dissemination. There has also been much assistance on various projects and matters for dioceses and hierarchs ranging from logistics to specific requests on a host of issues.

Planning for the 20<sup>th</sup> All American Council began in the Fall. A full report on the planning is enclosed. There will need to be some decisions made in the near future as well as some site visits. The excess funds from the 19<sup>th</sup> All American Council have been marked for use by the Preconciliar Commission for the planning of the next Council.

## **7. Archives**

The Archives project is now at a critical stage. The Committee has received and analyzed the final bids for the project. The project has come in substantially larger than anticipated and far beyond the budgeted amount. As such a number of people have reviewed the project and offered recommendations. There was also a meeting with the architects and the engineers in December to discuss how to move the project forward. As such, the architects did a full review and broke out the expenses into various categories. The letter and analysis is attached.

There are three categories: deferred, core and archives. The most critical of the categories is the core issues which include the stabilization of the walls, the water leakage issue, and electrical issues. These must be fixed no matter how the project proceeds and is estimated to be around \$137,000. The next critical area is to upgrade the actual condition of the archives. This includes bringing the space up to code, painting, repair of the floor and ceiling, adding an HVAC system as well as other structural and cosmetic upgrades. This is estimated to cost \$237,000. Finally is the deferred work which is not critical but will upgrade the conditions and presentation space in the archives. This is estimated to cost \$90,000.

None of this is ideal and certainly outside the budgeted amount. I would advise that some of this work needs to be done regardless of the final decision on the space and the goal is to have a presentable and stable archives. While there may not be a budgeted amount to complete the work, there are various fundraising ideas that could be utilized which may bring in the needed income. These have been generally discussed with His Beatitude.

## **8. Estate Management**



Due to the tight budget, the larger maintenance have been deferred though a number of smaller projects were completed. The continuing maintenance projects are on track such as furnace repair, gutter cleaning, ground maintenance, etc.

The major upcoming maintenance issues are the continuing driveway repair, some more window replacements, upgrades to the kitchen and other public areas, power washing the building and of course the pool removal which has been delayed for many years and remains an insurance liability.

## **9. Communications**

I continue to thank the great communications team of Fr. John Matusiak, Matushka Jessica Fuhrman and Ryan Platte. We are in daily contact and often plan articles and postings well in advance. I would remind everyone to send us articles and ideas so we can continue to provide the best coverage of the work of the OCA and the Orthodox Church.

The *OCA Review* will continue to be published. The annual Desk Calendar was published and sent out. The new Metric Book was published and the royalty check from SVS Press was used to offset the publishing costs.

The new website is in the final stages and a meeting was held to finalize some of the outstanding issues. We expect to release it after Pascha. Ryan has been working through the final coding of the pages. The team has been editing and arranging the pages for their final form. We expect the new website to go live in the coming months.

A final note is that we need to begin looking into preparing material for the upcoming 50<sup>th</sup> anniversary of the granting of autocephaly of the OCA. This could include a re-release of icons of American saints (of which I found some masters of the last printing) as well as updating and republishing the so called "Red Book" and the History of the Orthodox Church in America book.

## **10. Crisis Management**

There have been a few crisis management issues over the past months. Some necessitated the activation of the Team and others were handled on a more localized basis with members of the Legal Team and Bernie Wilson. These issues come forward at different times and they are dealt with in a timely manner. There is always a coordinated effort. Specifics can be spoken about in an executive session as they often deal with very sensitive issues.

## **11. Other**

I continue to manage and teach the Mentorship program for third year students at St. Vladimir's Seminary.

I also continue to work with the Eastern Orthodox Committee on Scouting and the Religious Relations Committee of the Boy Scouts. I will be the Chief Chaplain for the Boy Scouts for the World Jamboree this summer. I am working closely with DESMOS, the international Orthodox Scouting association to plan the program and services. The witness we provide to such events is incredibly important and we need to continue this work. Bishop David was selected to be the Episcopal Liaison for the Scouts for the Assembly of Bishops and we are working with him on some projects.

I am sure I am missing other work that has been done and ask your forgiveness. I thank you for your continued support through my eleven years as the Secretary of the Orthodox Church in America.

# **Preliminary Report for the 20th All-American Council**

## **Archpriest Eric G. Tosi**

### **1. Introduction**

The 20<sup>th</sup> All-American Council will be held in 2021. As such, planning has begun for sites and dates that would adhere to the guidance from the Holy Synod. Dn Peter and Ilchuk and I prepared a prospectus on the requirements for the AAC. We once again contracted Conference Direct as our AAC partners as they have assisted us successfully for many years. Roxanne Kramer was once again assigned as our representative. As a note, we do not pay Conference Direct but rather they get their fees from the hotel that we choose. They have much more clout and influence on the negotiating process and can search every major hotel in every city throughout North America.

Following the prospectus process and the search process, Conference Direct came back to us with a list of possible cities and sites. There were initially some 16 cities throughout the United States that were part of the bidding process. After more negotiations this was brought down to five finalists with one extraordinary bid. It should be noted that the OCA does have a series of contract assumptions which some cities can meet and some cannot. In addition, local Convention and Visitors Bureaus (CVB) are brought into the process as they offer incentives such as paying for site visits and funding opportunities.

### **2. Preplanning Assumptions**

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

A. The Council should be held in the summer so that there could be more family participation. This is important as part of the negotiations with the potential Council sites. There should be activities for families as well as consideration of the weather. Three dates were offered which meet this criteria.

1. July 9th - 16th, 2021
2. July 16th - 23rd, 2021
3. July 23rd - 30th, 2021

B. That there should once again be a "youth" component to the Council. The last AAC in St. Louis, had a successful and larger youth program which built on the previous youth program in Atlanta. Their final presentation was one of the highlights of the AAC. So once again we will have a youth component.

C. FOCA held their annual convention in conjunction with the 19<sup>th</sup> AAC in St. Louis. This was the second time this was done and it was also very successful. Not only was FOCA (re)introduced to the OCA but FOCA benefitted with better attendance and outreach. FOCA will once again be a part of the planning process.

D. The major consideration when planning the AAC is costs. We have been successful in keeping overall costs down or restrained due to shifting to more paperless operations such as electronic registration and reports. The major consideration is still the bottom line for parishes and their delegates. It is a considerable investment to come to an AAC not only through assessments but travel, hotel and food. We are acutely conscious of this fact and look for sites that have the best pricing in all of these matters.

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

F. The initial list of cities were as follows:

1. Denver (no dates available)
2. Cleveland (no space large enough would have to use convention center)
3. Minneapolis (bid in progress)
4. Charlotte (refused bid)
5. Philadelphia (refused bid)
6. Boston (bid too high)
7. Baltimore (special excellent bid)
8. Dallas (received bids)
9. Houston (no bid)
10. San Antonio (no bid)
11. Phoenix (bid in progress)
12. Orlando (received bids)
13. Vancouver (no bid)
14. Mexico City (no bid)
15. Buffalo (no space large enough)
16. Atlanta (bid upon request)

As can be seen, many of the hotels were either too expensive, did not have dates or could not support an AAC. The final list was narrowed down to

1. Baltimore: Baltimore Hilton (July 23 to 30, 2021)
2. Dallas: Omni Dallas (July 9 to July 17, 2021)  
Sheraton Dallas (July 9 to July 17, 2021)
3. Orlando: Omni Orlando Champions Gate (July 23 to 30, 2021)  
Renaissance Orlando at SeaWorld (July 16 to 24, 2021)  
Rosen Centre (July 9 to July 17 and July 16 to July 24, 2021)
4. Phoenix (pending)
5. Minneapolis (pending)
6. Atlanta: Omni Atlanta at CNN (July 23 to 30, 2021)

Some of these sites have been visited in the past and no current visits have happened.

#### G. Extraordinary Contract

On December 31, with the blessing of His Beatitude, an extraordinary contract was signed with the Baltimore Hilton. The circumstances were unusual and a non-binding contract was needed to be signed prior to the end of the year. The Baltimore Hilton (which overlooks the Inner Harbor and Camden Yards) had lost a major contract for the main time period we were examining. In order to fill the slot before the end of the year, they offered an unusual contract which we could back out from by March 31 without any risk or penalty. They offered a \$143 a night rate and no food and beverage minimum. This also included the unusual low rates for staff, parking, rooms etc. This offer was presented to His Beatitude, Fr. Alexander Rentel and Judge E.R. Lanier. After a review and with the blessing of His Beatitude, I signed the contract in order to hold the spot. We currently have it on hold until March 31.

This was unusual in two ways. First in that it was out of the normal procedures of AAC planning in which the Holy Synod and the Metropolitan Council offer guidance. The offer does not preclude this as we have until March 31 to cancel the contract. The date reserved is July 23 to 30, 2021.

Second, the no food and beverage minimum is a very important concession. This is where hotels normally make a major portion of their income and one in which we use to negotiate concessions from the hotel (we usually spend close to \$90,000 on this aspect). Since we have already locked in an excellent room price which is comparable to the last 3 AAC, we are in a stronger bargaining position as we move forward with final planning and negotiations. We plan on getting other concessions. We have visited the hotel in the past and it certainly meets our standards and requirements.

### **3. Decision Points**

A. The first major decision point is the date of the 20th All American Council. Not all of the dates requested are available at all of the hotels. For example, one site only had dates available at the end of August which would preclude a youth program. Other sites were already filled on our requested dates (focusing on July and August timeframes) which means that future planning will need to happen earlier. A number of sites were dropped simply because of the dates.

B. The next major decision is the location as the choice of city will affect the date of the Council. Involved in this recommendation are many options including local, support, hotel facilities, concessions and price, as well as transportation costs for both delegates and equipment. A major consideration (and consistently

articulated to the bidding hotels) was the bottom line. In other words, what was the cost going to be for a parish to send delegates to the AAC. This includes the costs of hotel room, the range of food options in the immediate area, costs of transport to the location, and any possible extra expenses. This also includes a range of family friendly options for the youth component.

After consideration and consultation, it is recommended that Baltimore be chosen as the site of the 20th All American Council. These are the reasons:

1. This is a very good deal for the Church. We rarely see such numbers and concessions before we begin the formal process of site selection. The room rates are very competitive and Baltimore is easily accessible by airlines and car. The hotel is beautiful and in an ideal location. There are plenty of local venues for food and for youth. FOCA would be well positioned to be in Baltimore because there is a strong chapter there. The youth program will be well served with a number of venues including Washington DC.

We have tried to find a venue in the Northeast for a number of AACs and could not make the numbers work. The local committee can be populated from the Archdiocese and be augmented by other diocese if needed. There would not be an issue in operations. It will also save costs in shipping items. Overall it is the best choice for the AAC.

2. Dallas is a perennial candidate for an AAC. There is a strong presence and the hotels are excellent. There would need to be more negotiating done to get the prices and concessions that we need. We did do an AAC in the South in the recent past. Transportation costs would be high.

3. Orlando has been done in the past and there are many positives about going back there including the venues and local attractions. It would certainly need to have some planning for the local committee and the transportation costs would be fine as this is a major destination. I think weather will be an issue (as in all of the places). The costs would need to be negotiated and certainly Orlando wants business in the summer.

4. Phoenix and Minneapolis need much more development in contracts and the transportation will be a major issue to both of these places.

C. There will be the need to appoint a Preconciliar Commission. The preplanning committee will now morph into the Preconciliar Committee. The PCC requires an Episcopal chair and His Beatitude has decided that he will fill this position. Fr. Alexander Rentel and Fr. Leonid Kishkovsky should be

appointed. The new secretary and treasurer of the Church should be appointed when they assume their duties. Dn. Peter Ilchuk has been appointed as the Council Manager. The Metropolitan Council should nominate a member of the Council as the representative of the Metropolitan Council. FOCA should be asked to appoint a representative to assist in that part of the logistics. There will need to be a Youth Director appointed. The final 2 members can be appointed at a later date and should be decided by the Metropolitan as to who will be the local clergy and lay leaders.

This will bring the PCC to ten people which is the normal and functional size. The final appointments are then recommended to the Holy Synod for approval. For more information on the duties and responsibilities of the PCC, refer to Article III, Section 5 of the Statute.

D. The next decision is on the goals for this AAC. Certainly there is some minor work such as Statute amendments but what is this AAC going to accomplish and build upon after such a successful AAC in St. Louis? Following the last AAC, a number of ideas have been circulated from the post AAC survey (attached) which includes:

1. 50<sup>th</sup> Anniversary of the OCA
2. A serious look into Church and theological education
3. A focus on practical parish operations and parish life
4. The development of youth
5. World Orthodoxy and the place of the OCA
6. Continuing the theme of expanding the mission and evangelism

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

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

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

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

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

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

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

G. The assessment level will need to be established for this AAC. The plan is for dioceses to be assessed who will in turn assess their parishes as they see proper worked well. A preliminary budget will be formed based on both St. Louis and Atlanta and be submitted for approval in due time. We did come in under budget for St. Louis

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

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

A. The 20th AAC will be held on Monday, July 26 to Friday, July 30, 2021 at the Baltimore Hilton. The FOCA Convention will be held Saturday, July 24, 2021 to Monday, July 26, 2021 prior to the AAC.

B. The Preconciliar Committee be formed as recommended.

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

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



- E. Preliminary theme, goals and direction of the 20<sup>th</sup> AAC be discussed.
- F. Preliminary organization of the 20<sup>th</sup> AAC be established.
- G. All other operational matters are the purview of the PCC subject to approval by the Metropolitan Council and Holy Synod.

# Technology services report

*February 2019*

With the conclusion of the All-American Council, the technical work to be done is copious but is all focused on delivering the new website.

We were in need of upgrades to our entire technology stack, with outdated operating system, web server, database, language runtime, content management system, and extensions. Implementing the redesign without these upgrades would have meant significant waste from rework.

The challenge that makes upgrades expensive and risky is that there are countless details and changes can happen in many areas of the system, yet the website needs to stay running as seamlessly as possible and end users should see no visible problems. Most techniques for making such a change either involve long “maintenance windows” (downtime) during which risky and error-prone changes are made, or involve information getting out of sync (think news stories being out of date after the cutover to a new system).

Given the large number of changes planned, I have built a tool that allows me to create a new system cloning the oca.org server in just a few minutes with minimal manual steps. This setup also provides version control for the website software so that changes can be made and tested in a “staging” environment. Creating a new oca.org system has gone from being a risky, laborious process taking months to a fairly casual process, greatly reducing the risk of a cutover and allowing many other improvements.

Using this tool we have successfully upgraded every part of the system in a process that has spanned 54 steps so far. Most resultant defects were caught prior to launching the various upgrades. There are more upgrades needed to get fully current (which we must do soon), but we are now past the need for rework, and building the redesign is the very next step.

There are over 200 files that will need to be re-coded, reviewed, and tweaked in the process of implementing the design, but that process begins this month.

Other updates:

- The AAC photo delivery was completed and installed, requiring more elbow grease than in previous years due to human error upstream.
- We now forward incoming Twitter messages to the communications team, enabling more responsiveness to questions that come through that channel.
- The overdue completion of the Chancery database custom reports project is the next priority after the redesign.

In this last report submitted through Father Eric Tosi, I would like to congratulate him on his successful tenure as Secretary, thank him for the positive experience of working together with him for several years, and wish him well in the future.

In Christ,

Ryan Platte, technical manager

**OCA ARCHIVES ADVISORY COMMITTEE**  
**REPORT TO THE STANDING SYNOD / METROPOLITAN COUNCIL**  
**2019 Spring Meeting**

**Members**

Metropolitan Tikhon, *Synod Liaison*  
Matushka Tamara Skvir, *Chairperson*  
Archpriest John Erickson  
Matthew Garklavs  
Dr. Jurretta Heckscher  
Alexis Liberovsky, *OCA Archivist & Committee*  
*Secretary*

Archpriest John Perich  
Archpriest Alexander Rentel, *OCA Chancellor*  
Melanie Ringa, *OCA Treasurer*  
Daria Safronova-Simeonoff  
Gregory Shesko  
Dr. Anatol Shmelev  
Archpriest Eric Tosi, *OCA Secretary*  
Archpriest Vladimir von Tsurikov

**Consultants**

Sergei D. Arhipov  
Dr. David Ford  
Dr. Scott M. Kenworthy  
Eleana Silk  
Popadija Kitty Vitko

The establishment of a committee to study the housing needs of the OCA Archives and to develop solutions was mandated by decision of the Metropolitan Council at its 2013 Spring Session. The OCA Archives Advisory Committee was formed soon after in fulfillment of this mandate.

Mission Statement:

***“The purpose of the OCA Archives Advisory Committee is to assess the housing, preservation and access needs of the OCA Archives and to develop strategic solutions. The committee will also explore and develop outside sources of funding, including grants, for housing and other unfunded projects of the OCA Archives. The committee members will advise the OCA Archivist in their respective areas of expertise. The committee may include additional experts as consultants, as needed.”***

Several contractors submitted bids in the fall for the renovation of the chancery basement where the OCA Archives are housed and all exceeded available funding from the McGuire Family Charitable Remainder Trust. Discussions with the architects are underway in order to revise the renovation plans so as to be within budget. Some aspects of the renovation are being recategorized as general building maintenance and will not be funded by the McGuire Trust Fund’s Archives renovation project. Additionally, alternative sources of funding are being explored to cover remaining shortfall for the Archives portion of the renovation

Meanwhile, at the suggestion of a colleague, a grant opportunity to cover archival digitization was explored late last summer. The Archives Advisory Committee has long stressed the imperative and urgent need for digitization of our collection of film, audio and video recordings due to their limited shelf life. A preliminary inquiry addressed to the foundation - which wishes to remain anonymous - yielded a generous grant of \$49,000 for digitization in the OCA Archives, the full

amount mentioned in our letter to them. The funds received will be used for equipment, supplies, a temporary assistant stipend and vendor digitization services. In addition to film, audio and video recordings, we are also projecting to digitize some of our photo collection - in particular, oversized images - under this grant. The various facets of this project are in the organizational stage, with implementation expected to begin soon.

The OCA Archivist's participation in the Fort Ross Dialogue Conference in Veliky Novgorod, Russia last May (<https://oca.org/news/headline-news/oca-archivist-participates-in-recent-ft.-ross-dialogue-conference>) has resulted in significant visibility for the OCA Archives Thanks to funding from conference organizers; this trip did not entail any expense for the church. While in Saint Petersburg after the conference, the Archivist was able to conduct research on the Church in America in the records of the Holy Synod during the Czarist regime at the Russian State Historical Archives.

It was heartening to receive positive feedback on the OCA Archives display at the 19th All-American Council last summer and in response to the Archivist's brief appeal for support for the Archives during the final plenary session.

As in previous years, we will again submit an application for a fully funded summer intern from Adelphi University's Community Fellows Program, even though we have been assigned an intern only once in the four years we have applied.

While the OCA Archives remains closed to onsite researchers due to ongoing preparation for renovations, the Archivist continues to respond to a constant stream of historical inquiries from around the world by providing the information requested or copies of documents from the OCA Archives.

The Committee requests the continued prayers and support of the Metropolitan Council and the entire Church for its ongoing efforts to properly preserve the Church's archival treasures and to promote the Church's historical legacy.

Respectfully submitted,

Alexis Liberovsky  
OCA Archivist  
Secretary – Archives Advisory Committee



SMIROS & SMIROS  
ARCHITECTS

February 1, 2019

The Very Reverend Eric G. Tosi  
Orthodox Church in America  
6850 N. Hempstead Turnpike  
Syosset, NY 11791-0675

Re: Archives

Dear Fr. Eric,

The lowest bid for construction of the new Archives and associated deferred maintenance and core & shell work is \$396,200. The deferred maintenance and core & shell work, while not specific to the Archives, is due to the age of the building and its current condition. The "Deferred Maintenance" expense will be necessary in the next few years. The "Core & Shell" expense is necessary to make the building code compliant to support installation of the Archives in the Basement. Following is a summary of the lowest bid by category with key cost components (excl. General Conditions, Overhead & Profit and Insurance), a detailed analysis is attached:

Archives \$189,744 (\$50 per square foot):

1. Painting \$50,873
2. Rough Carpentry \$44,450
3. HVAC \$35,250
4. Electrical \$28,075

Deferred Maintenance \$79,609 (\$21 per square foot):

1. Concrete \$22,000 – Repair and replace sections of existing south garden retaining wall
2. Electrical \$14,000 – Existing electrical service is currently undersized and needs to be upgraded
3. Rough Carpentry \$9,525 – Concrete, electrical and window maintenance
4. Windows \$7,950 – Replace basement windows, which leak and are beyond their serviceable lifespan.

Core & Shell \$126,848 (\$33 per square foot):

1. Concrete \$74,000 – Concrete/masonry work for new egress stairs & access ramp required per code.
2. Rough Carpentry \$9,525 – Insulation and work associated with the concrete and electrical.
3. Electrical \$7,425 – Rough electrical work
4. Metals \$5,100 – New railing for new egress stairs and access ramp.

Based on the combined costs of all three categories, the per square foot cost is \$83, which is a very good buy compared to building a standalone structure to serve the same purpose.

Let us know if you have any questions, comments, or concerns.

Regards,

James Smiros AIA, Partner

Encl.

**Orthodox Church in America  
Treasurer's Report  
For the Year ended December 31, 2018**

Your Beatitude, Your Eminences, Your Graces, Reverend Fathers, and brothers and sisters in Christ:

- Attached are the **PRELIMINARY** financial results for the year ended December 31, 2018. As a reminder, the operating budget that was passed last fall by the Metropolitan Council was a **BALANCED** Operating budget.

**2018 Financial Results (Exhibits A, B-1 and B-2)**

*Exhibit A – Comparative Balance Sheets:* Our balance sheet as of December 31, 2018 shows total assets of \$3,425,671, total liabilities of \$231,083 and net assets of \$3,194,588, a decrease of \$3,479 for the year. We have total cash of \$396,780, of which \$15,452 is unrestricted. Accounts receivable of \$187,635 represents fourth quarter diocesan support due, all of which was received by the end of January, 2019. Other current assets include prepaid expenses of \$18,704 representing \$13,000 for 2019 Blackbaud maintenance, and \$3,000 for postage machine rental. Our restricted investments and trusts show a balance of \$2,404,290. Our current liabilities include \$85,959 in accounts payable and accrued expenses and \$26,000 remaining on a retirement obligation. Our net assets at the beginning of the year were \$3,198,067, and with the net deficit for the year stand at \$3,194,588 at December 31, 2018.

*Exhibit B – Recap Actual versus Budget*

The 2018 budget projected a balanced Operating budget. Our actual results show a deficit of \$3,479. Our Unrestricted Fund (Operating fund) had a net deficit of \$46,114 for the year. Highlights of the main revenue and expense category actual results for the year are:

- **Revenues** – Total revenues were under budget by \$3,215, with \$10,101 representing greater diocesan support. General and chapel donations were lower than projected.
- **Expenses**
  - Expenses for the year were over budget by \$65.6K. This variance was due to:
    - Executive and Administration – The net overage was \$5.1K due mainly to increased travel as we held two Chancellors/Treasurers' meetings during 2018.
    - Property Support – The increase of \$23.3K was due to needed repairs on the building (\$6.2K); utilities (\$5.1K), increased town taxes (\$4.1K), increased Depreciation expense (\$4.9K)
    - External Relations/St. Catherine's - \$10.5K due to one-time moving and apartment rental expense for the new rector of St. Catherine's.
    - Metropolitan Council - \$8.1K related to travel expense for the members.
    - Communications - \$18.9K for web redesign and updating (\$12.5K of this was funded from an unrestricted bequest received on 2017 and internally earmarked for this project).



P.O. Box 675  
SYOSSET, NY 11791-0675  
TEL: 516.922.0550  
FAX: 516.922.0954  
WEBSITE: WWW.OCA.ORG

- “Stewards of the Orthodox Church” Revenue and Expenses
  - The year-to-date revenues were \$90.1K as compared with the budget of \$85.0K for a positive variance of \$5.1K.
  - Diaconal Vocations Program and Online Choral Conducting fees were under budget by \$2.2K;
  - Departmental expenses were \$87.7K compared to a budget of \$104.1K, for a positive variance of \$16.4K.
  
- Temporarily Restricted Funds: Total revenues were \$659.2K including:
  - \$422.4K of All-American Council income;
  - \$ 53.4K towards Youth Director;
  - \$174K in Grant Revenues comprised of \$125K for the Thriving in Ministry Grant for Pastoral Life and \$49K towards the Archives Renovation Project.
  - Expenses were \$383.1K, including the required annuity payments, charity distributions of \$3K, planting grants of \$20.9K and All-American Council expenses of \$352.3K. The net surplus in these funds was \$276.1K.
  
- Permanently Restricted Funds: We had net unrealized loss of \$221.2K, expenses of \$12.2K, resulting in a net deficit of \$233.5K.

Respectfully submitted,



Melanie Ringa  
Treasurer



**Orthodox Church in America**  
**Comparative Balance Sheets**  
**As of December 31, 2018 and December 31, 2017**

**EXHIBIT A**

	<b>Dec 31, 2018</b>	<b>Dec 31, 2017</b>
<b>ASSETS</b>		
<b>Current Assets</b>		
<i>Unrestricted</i>		
TD Bank - Operating	\$ 4,583	\$ 16,933
TD Bank - Payroll	\$ 465	\$ 1,594
Astoria Bank- St.Sergius Chapel	\$ 9,818	\$ 13,806
Petty Cash- Chancery Office	\$ 586	\$ 952
	\$ 15,452	\$ 33,285
<i>Temporarily Restricted</i>		
TD Bank- All American Council	\$ 62,578	\$ 9,415
TD Bank - Restricted	\$ 15,718	\$ 23,532
TD Bank - Grant Account	\$ 124,998	\$ -
TD Bank- Savings	\$ 178,034	\$ 276,680
	\$ 381,328	\$ 309,627
<b>Total Cash</b>	\$ 396,780	\$ 342,912
<b>Accounts Receivable</b>		
Diocesan Support Receivable	\$ 187,635	\$ 259,809
<b>Total Accounts Receivable</b>	\$ 187,635	\$ 259,809
<b>Other Current Assets</b>		
Due from OCA Pension Dept	\$ -	\$ 14,638
Prepaid Expense	\$ 18,704	\$ 20,226
Other	\$ -	\$ -
<b>Total Other Current Assets</b>	\$ 18,704	\$ 34,864
<b>Total Current Assets</b>	\$ 603,119	\$ 637,585
<b>Fixed Assets</b>		
Plant Fund - Real Estate	\$ 45,000	\$ 45,000
Plant Fund Building & Improve	\$ 625,308	\$ 552,108
Plant Fund Furniture & Equip	\$ 61,945	\$ 55,399
Plant Fund Auto & Garden Equip	\$ 65,922	\$ 58,922
Plant Fund Computer Equip	\$ 42,517	\$ 42,517
Plant Fund Software	\$ 33,000	\$ 33,000
Plant Fund Chapel Equip & Furn	\$ 25,000	\$ 25,000
Construction in Progress	\$ 104,067	\$ 36,718
Accum Deprec Bld & Improvements	\$ (396,983)	\$ (381,858)
Accum Deprec Furn & Equip	\$ (36,927)	\$ (33,084)
Accum Deprec Auto & Garden Equi	\$ (61,255)	\$ (58,921)
Accum Deprec Computer Equip	\$ (31,332)	\$ (31,332)
Accum Deprec Computer Software	\$ (33,000)	\$ (33,000)
Accum Deprec Chapel Equip & Fur	\$ (25,000)	\$ (25,000)
<b>Total Fixed Assets</b>	\$ 418,262	\$ 285,469
<b>Restricted Investments and Trusts</b>		

**Orthodox Church in America**  
**Comparative Balance Sheets**  
As of December 31, 2018 and December 31, 2017

**EXHIBIT A**

	<b>Dec 31, 2018</b>	<b>Dec 31, 2017</b>								
FOS Endowment -Phila Trust Co	\$ 68,887	\$ 80,297								
Kavalenko Nimcrut-Wells Fargo Advisors	\$ 71,734	\$ 77,679								
St. Andrew's Endowment - Phila Trust Co	\$ 100,480	\$ 115,533								
Main Endowment - Phila Trust Co	\$ 1,202,297	\$ 1,303,866								
HVIZD Annuity	\$ 79,824	\$ 79,824								
Mission Endowment - OCCIF	\$ 150,000	\$ -								
Mission Endowment - Phila Trust Co	\$ 731,068	\$ 990,214								
<b>Total Restricted Investments and Trusts</b>	<b>\$ 2,404,290</b>	<b>\$ 2,647,413</b>								
<b>TOTAL ASSETS</b>	<b>\$ 3,425,671</b>	<b>\$ 3,570,467</b>								
<b>LIABILITIES &amp; EQUITY</b>										
<b>Current Liabilities</b>										
Accounts payable and accrued Expenses	\$ 85,959	\$ 215,875								
Retirement Obligation	\$ 26,600	\$ 38,000								
<b>Total Current Liabilities</b>	<b>\$ 112,559</b>	<b>\$ 253,875</b>								
<b>Long Term Liabilities</b>										
<b>Deferred Compensation and annuities</b>										
Hvizd Annuity liability	\$ 69,087	\$ 69,087								
Deferred revenue	\$ 330	\$ 331								
Unitrust Liab reserves	\$ 49,107	\$ 49,107								
<b>Total Deferred compensation and annuities</b>	<b>\$ 118,524</b>	<b>\$ 118,525</b>								
<b>Total Liabilities</b>	<b>\$ 231,083</b>	<b>\$ 372,400</b>								
<b>Equity</b>										
Unrestricted Net Assets, 12/31/17	\$ 370,516	\$ 370,516								
Temporarily Restricted Net Assets, 12/31/17	\$ 1,793,435	\$ 1,793,435								
Permanently Restricted Net Assets, 12/31/17	\$ 1,034,116	\$ 1,034,116								
<b>Total Net Assets</b>	<b>\$ 3,198,067</b>	<b>\$ 3,198,067</b>								
<b>Current Year Activity - 2018</b>	\$ (3,479)	\$ -								
	\$ -	\$ -								
<b>Total Net Assets</b>	\$ 3,194,588	\$ 3,198,067								
<b>Total Equity</b>	<b>\$ 3,194,588</b>	<b>\$ 3,198,067</b>								
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$ 3,425,671</b>	<b>\$ 3,570,467</b>								
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Unrestricted Surplus/(Deficit) - 2018</td> <td style="text-align: right;">\$ (46,114)</td> </tr> <tr> <td>Temp Restricted Surplus/(Deficit)</td> <td style="text-align: right;">\$ 276,095</td> </tr> <tr> <td>Perm Restricted Surplus/(Deficit)</td> <td style="text-align: right;">\$ (233,460)</td> </tr> <tr> <td></td> <td style="text-align: right; border-top: 1px solid black;"><b>\$ (3,479)</b></td> </tr> </table>			Unrestricted Surplus/(Deficit) - 2018	\$ (46,114)	Temp Restricted Surplus/(Deficit)	\$ 276,095	Perm Restricted Surplus/(Deficit)	\$ (233,460)		<b>\$ (3,479)</b>
Unrestricted Surplus/(Deficit) - 2018	\$ (46,114)									
Temp Restricted Surplus/(Deficit)	\$ 276,095									
Perm Restricted Surplus/(Deficit)	\$ (233,460)									
	<b>\$ (3,479)</b>									

Orthodox Church in America  
**Statement of Activities vs Budget- RECAP BY DEPARTMENT**  
 For the year ended 12/31/18

EXHIBIT B-1

	FINAL Budget 2018	Actual Q1 2018	Actual Q2 2018	Actual Q3&4 2018	YTD 12/31/2018	2018 Budget 12/31/2018	Variance to Budget
<b>Unrestricted Funds:</b>							
Diocesan Support	\$ 1,706,644	\$ 422,385	\$ 453,681	\$ 840,679	\$ 1,716,745	\$ 1,706,644	\$ 10,101
Contributions	\$ 25,000	\$ 4,457	\$ 3,031	\$ 4,468	\$ 11,956	\$ 25,000	\$ (13,044)
Chapel	\$ 12,000	\$ 1,647	\$ 3,535	\$ 3,538	\$ 8,720	\$ 12,000	\$ (3,280)
Continuing Education Workshop Revenue	\$ 7,500	\$ -	\$ 9,000	\$ 4,650	\$ 13,650	\$ 7,500	\$ 6,150
Other	\$ 10,200	\$ 2,369	\$ 23	\$ 4,666	\$ 7,058	\$ 10,200	\$ (3,142)
<b>Total Revenues</b>	<b>\$ 1,761,344</b>	<b>\$ 430,858</b>	<b>\$ 469,270</b>	<b>\$ 858,001</b>	<b>\$ 1,758,129</b>	<b>\$ 1,761,344</b>	<b>\$ (3,215)</b>
<b>Expenses:</b>							
Executive Offices	\$ 418,997	\$ 103,644	\$ 99,602	\$ 206,186	\$ 409,432	\$ 418,997	\$ (9,565)
Administration	\$ 455,967	\$ 130,528	\$ 124,671	\$ 215,444	\$ 470,643	\$ 455,967	\$ 14,676
Metropolitan Expenses	\$ 67,324	\$ 12,319	\$ 20,210	\$ 39,049	\$ 71,578	\$ 67,324	\$ 4,254
Holy Synod	\$ 61,280	\$ 7,304	\$ 23,904	\$ 30,729	\$ 61,937	\$ 61,280	\$ 657
Metropolitan Council	\$ 28,200	\$ 14,414	\$ 200	\$ 21,707	\$ 36,321	\$ 28,200	\$ 8,121
Property Support	\$ 217,274	\$ 64,532	\$ 50,885	\$ 125,171	\$ 240,588	\$ 217,274	\$ 23,314
Communications/TOC	\$ 81,200	\$ 25,040	\$ 20,454	\$ 54,662	\$ 100,156	\$ 81,200	\$ 18,956
External Affairs/ St Catherine's	\$ 126,211	\$ 28,459	\$ 39,770	\$ 68,531	\$ 136,760	\$ 126,211	\$ 10,549
Archives	\$ 101,668	\$ 36,311	\$ 14,136	\$ 54,019	\$ 104,466	\$ 101,668	\$ 2,798
St Sergius Chapel	\$ 6,200	\$ 184	\$ 3,519	\$ 8,434	\$ 12,137	\$ 6,200	\$ 5,937
Ordination Candidate Testing	\$ 20,400	\$ 1,510	\$ 4,400	\$ (1,000)	\$ 4,910	\$ 20,400	\$ (15,490)
Office of Policy on Sexual Misconduct	\$ 60,930	\$ 12,282	\$ 12,645	\$ 28,229	\$ 53,156	\$ 60,930	\$ (7,774)
Board of Theological Education	\$ 1,200	\$ -	\$ 5,351	\$ -	\$ 5,351	\$ 1,200	\$ 4,151
PCC Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Church Planting Grants	\$ 74,350	\$ 25,000	\$ 25,000	\$ 24,350	\$ 74,350	\$ 74,350	\$ -
Seminary Support	\$ 18,000	\$ -	\$ -	\$ 18,000	\$ 18,000	\$ 18,000	\$ -
Strategic Planning-Continuing Education	\$ 9,000	\$ -	\$ 8,600	\$ 5,289	\$ 13,889	\$ 9,000	\$ 4,889
<b>Total Operating Expenses</b>	<b>\$ 1,748,201</b>	<b>\$ 461,527</b>	<b>\$ 453,347</b>	<b>\$ 898,800</b>	<b>\$ 1,813,674</b>	<b>\$ 1,748,201</b>	<b>\$ 65,473</b>
<b>Net Operating Surplus(Deficit)</b>	<b>\$ 13,143</b>	<b>\$ (30,669)</b>	<b>\$ 15,923</b>	<b>\$ (40,799)</b>	<b>\$ (55,545)</b>	<b>\$ 13,143</b>	<b>\$ (68,688)</b>
<b>"Stewards of the Orthodox Church" and Departmental Ministries:</b>							
<b>Revenue (Appeals &amp; DVP Program)</b>	<b>\$ 96,091</b>	<b>\$ 28,653</b>	<b>\$ 9,043</b>	<b>\$ 61,290</b>	<b>\$ 98,986</b>	<b>\$ 96,091</b>	<b>\$ 2,895</b>
<b>Expenses:</b>							
Administrative Expenses	\$ -	\$ 629	\$ 108	\$ 1,121	\$ 1,858	\$ -	\$ 1,858
Institutional Chaplaincy	\$ 8,125	\$ 1,912	\$ 1,650	\$ 3,895	\$ 7,457	\$ 8,125	\$ (668)
Evangelization	\$ 10,600	\$ 2,154	\$ 2,869	\$ 5,969	\$ 10,992	\$ 10,600	\$ 392
Liturgical Music	\$ 12,000	\$ 3,064	\$ 2,927	\$ 5,942	\$ 11,933	\$ 12,000	\$ (67)
Pastoral Life	\$ 10,000	\$ 1,500	\$ 2,233	\$ 3,163	\$ 6,896	\$ 10,000	\$ (3,104)
Christian Education	\$ 10,902	\$ 1,500	\$ 1,788	\$ 6,381	\$ 9,669	\$ 10,902	\$ (1,233)
Youth and Young Adults	\$ 26,700	\$ 1,000	\$ 375	\$ 13,002	\$ 14,377	\$ 26,700	\$ (12,323)
Diaconal Vocations	\$ 15,250	\$ 3,000	\$ 3,422	\$ 6,000	\$ 12,422	\$ 15,250	\$ (2,828)
Christian Service/Humanitarian Aid	\$ 10,575	\$ 2,877	\$ 1,650	\$ 9,424	\$ 13,951	\$ 10,575	\$ 3,376
<b>Total Expenses</b>	<b>\$ 104,152</b>	<b>\$ 17,636</b>	<b>\$ 17,022</b>	<b>\$ 54,897</b>	<b>\$ 89,555</b>	<b>\$ 104,152</b>	<b>\$ (14,597)</b>
<b>Net SOCA/Departmental Costs</b>	<b>\$ (8,061)</b>	<b>\$ 11,017</b>	<b>\$ (7,979)</b>	<b>\$ 6,393</b>	<b>\$ 9,431</b>	<b>\$ (8,061)</b>	<b>\$ 17,492</b>
<b>Net Operating Income</b>	<b>\$ 5,082</b>	<b>\$ (19,652)</b>	<b>\$ 7,944</b>	<b>\$ (34,406)</b>	<b>\$ (46,114)</b>	<b>\$ 5,082</b>	<b>\$ (51,196)</b>
<b>Net Operating Income (GAAP Basis)</b>	<b>\$ 5,082</b>	<b>\$ (19,652)</b>	<b>\$ 7,944</b>	<b>\$ (34,406)</b>	<b>\$ (46,114)</b>	<b>\$ 5,082</b>	<b>\$ (51,196)</b>
<b>Temporarily Restricted:</b>							
Revenues	\$ 385,250	\$ 52,264	\$ 110,599	\$ 496,389	\$ 659,252	\$ 385,250	\$ 274,002
Expenses	\$ (378,880)	\$ (74,097)	\$ 14,340	\$ (323,400)	\$ (383,157)	\$ (378,880)	\$ (4,277)
<b>Net Surplus/(Deficit)</b>	<b>\$ 6,370</b>	<b>\$ (21,833)</b>	<b>\$ 124,939</b>	<b>\$ 172,989</b>	<b>\$ 276,095</b>	<b>\$ 6,370</b>	<b>\$ 269,725</b>
<b>Permanently Restricted:</b>							
Revenues	\$ 15,000	\$ 742	\$ 665	\$ (222,634)	\$ (221,227)	\$ 15,000	\$ (236,227)
Expenses	\$ (4,350)	\$ -	\$ -	\$ (12,233)	\$ (12,233)	\$ (4,350)	\$ (7,883)
<b>Net Surplus/(Deficit)</b>	<b>\$ 10,650</b>	<b>\$ 742</b>	<b>\$ 665</b>	<b>\$ (234,867)</b>	<b>\$ (233,460)</b>	<b>\$ 10,650</b>	<b>\$ (244,110)</b>
<b>Total Change in Net Assets</b>	<b>\$ 22,102</b>	<b>\$ (40,743)</b>	<b>\$ 133,548</b>	<b>\$ (96,284)</b>	<b>\$ (3,479)</b>	<b>\$ 22,102</b>	<b>\$ (25,581)</b>

Orthodox Church in America Statement of Activities vs Budget For the year ended 12/31/18						EXHIBIT B-2
	FINAL Budget 2018	Actual 2018	Actual Thru 12/31/2018	Budget 12/31/2018	Variance to Budget	
<b>Unrestricted Funds:</b>						
<b>REVENUES</b>						
Diocesan Support	\$ 1,706,644	\$ 1,716,745	\$ 1,716,745	\$ 1,706,644	\$ 10,101	
Contributions	\$ 25,000	\$ 11,956	\$ 11,956	\$ 25,000	\$ (13,044)	
St. Sergius Chapel	\$ 12,000	\$ 8,720	\$ 8,720	\$ 12,000	\$ (3,280)	
Investment Income	\$ 500	\$ 82	\$ 82	\$ 500	\$ (418)	
Continuing Ed/Orsma Revenues	\$ 13,500	\$ 13,650	\$ 13,650	\$ 13,500	\$ 150	
Other (Yearbook/Desk Calendar/OCPC Royalty)	\$ 3,700	\$ 6,976	\$ 6,976	\$ 3,700	\$ 3,276	
<b>TOTAL REVENUES</b>	<b>\$ 1,761,344</b>	<b>\$ 1,758,129</b>	<b>\$ 1,758,129</b>	<b>\$ 1,761,344</b>	<b>\$ (3,215)</b>	
<b>EXPENSES</b>						
<b>Executive Offices</b>						
Salaries	\$ 311,717	\$ 311,903	\$ 311,903	\$ 311,717	\$ 186	
Clergy Housing	\$ 41,215	\$ 41,215	\$ 41,215	\$ 41,215	\$ -	
Payroll Taxes	\$ 3,990	\$ 3,990	\$ 3,990	\$ 3,990	\$ -	
Benefits(Medical, Unemployment, Pension)	\$ 62,075	\$ 52,324	\$ 52,324	\$ 62,075	\$ (9,751)	
	\$ 418,997	\$ 409,432	\$ 409,432	\$ 418,997	\$ (9,565)	
<b>Administrative Offices</b>						
Salaries	\$ 219,710	\$ 216,573	\$ 216,573	\$ 219,710	\$ (3,137)	
Payroll Taxes	\$ 14,662	\$ 16,568	\$ 16,568	\$ 14,662	\$ 1,906	
Benefits(Medical, Unemployment, Pension)	\$ 69,349	\$ 67,036	\$ 67,036	\$ 69,349	\$ (2,313)	
Legal	\$ 25,000	\$ 268	\$ 268	\$ 25,000	\$ (24,732)	
Outside contractors	\$ 21,650	\$ 36,245	\$ 36,245	\$ 21,650	\$ 14,595	
Accounting/Audit	\$ 19,000	\$ 18,650	\$ 18,650	\$ 19,000	\$ (350)	
Travel & meetings - central admin	\$ 15,930	\$ 33,657	\$ 33,657	\$ 15,930	\$ 17,727	
Telephone	\$ 12,700	\$ 12,033	\$ 12,033	\$ 12,700	\$ (667)	
Equipment leasing	\$ 20,148	\$ 22,912	\$ 22,912	\$ 20,148	\$ 2,764	
Postage, mailing services, printing & copying	\$ 15,000	\$ 12,045	\$ 12,045	\$ 15,000	\$ (2,955)	
Computer expense	\$ 4,000	\$ 4,587	\$ 4,587	\$ 4,000	\$ 587	
Stipends	\$ -	\$ -	\$ -	\$ -	\$ -	
Office Supplies	\$ 3,400	\$ 4,584	\$ 4,584	\$ 3,400	\$ 1,184	
Food	\$ 3,200	\$ 4,234	\$ 4,234	\$ 3,200	\$ 1,034	
Other administrative expenses(inc Auto)	\$ -	\$ 3,941	\$ 3,941	\$ -	\$ 3,941	
Insurance - D&O	\$ 3,446	\$ 4,777	\$ 4,777	\$ 3,446	\$ 1,331	
Payroll processing fees	\$ 3,538	\$ 3,102	\$ 3,102	\$ 3,538	\$ (436)	
Bank fees, registration fees	\$ 3,885	\$ 5,732	\$ 5,732	\$ 3,885	\$ 1,847	
Books, subscriptions, dues & other	\$ 1,350	\$ 3,699	\$ 3,699	\$ 1,350	\$ 2,349	
<b>Total Administrative Offices</b>	<b>\$ 455,968</b>	<b>\$ 470,643</b>	<b>\$ 470,643</b>	<b>\$ 455,968</b>	<b>\$ 14,675</b>	
<b>Metropolitan Expenses</b>						
Metropolitan Travel	\$ 55,950	\$ 43,667	\$ 43,667	\$ 55,950	\$ (12,283)	
Office expense	\$ 5,374	\$ 21,911	\$ 21,911	\$ 5,374	\$ 16,537	
Office of Military Chaplaincy - Stipends	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ -	
Office of Military Chaplaincy - Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Metropolitan Expenses</b>	<b>\$ 67,324</b>	<b>\$ 71,578</b>	<b>\$ 71,578</b>	<b>\$ 67,324</b>	<b>\$ 4,254</b>	
<b>Holy Synod</b>						
Travel	\$ 43,500	\$ 38,376	\$ 38,376	\$ 43,500	\$ (5,124)	
Special Episcopal Stipends	\$ 14,400	\$ 14,650	\$ 14,650	\$ 14,400	\$ 250	
Food	\$ 2,500	\$ 5,956	\$ 5,956	\$ 2,500	\$ 3,456	
Legal	\$ -	\$ -	\$ -	\$ -	\$ -	
Office supplies, Postage	\$ 880	\$ 855	\$ 855	\$ 880	\$ (25)	
Episcopal Salary/Benefits	\$ -	\$ 2,100	\$ 2,100	\$ -	\$ 2,100	
Other	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Holy Synod</b>	<b>\$ 61,280</b>	<b>\$ 61,937</b>	<b>\$ 61,937</b>	<b>\$ 61,280</b>	<b>\$ 657</b>	
<b>Metropolitan Council</b>						

	FINAL Budget 2018	Actual 2018	Actual Thru 12/31/2018	Budget 12/31/2018	Variance to Budget
Travel and Meetings - MC	\$ 26,000	\$ 33,929	\$ 33,929	\$ 26,000	\$ 7,929
Internal Audit - Travel, Lodging and Meals, Supplies	\$ 2,200	\$ 2,392	\$ 2,392	\$ 2,200	\$ 192
	\$ 28,200	\$ 36,321	\$ 36,321	\$ 28,200	\$ 8,121
<b>Property Support</b>	\$ -				
Salaries	\$ 47,277	\$ 47,277	\$ 47,277	\$ 47,277	\$ -
Payroll Taxes	\$ 3,617	\$ 3,617	\$ 3,617	\$ 3,617	\$ -
Lawn/Grounds Upkeep	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ -
Benefits(Medical, Unemployment, Pension)	\$ 14,704	\$ 17,155	\$ 17,155	\$ 14,704	\$ 2,451
Insurance	\$ 36,000	\$ 34,282	\$ 34,282	\$ 36,000	\$ (1,718)
Depreciation	\$ 16,325	\$ 21,301	\$ 21,301	\$ 16,325	\$ 4,976
Town Services Fee	\$ 36,000	\$ 40,102	\$ 40,102	\$ 36,000	\$ 4,102
Auto expense	\$ 3,000	\$ 5,010	\$ 5,010	\$ 3,000	\$ 2,010
Electricity	\$ 11,000	\$ 12,794	\$ 12,794	\$ 11,000	\$ 1,794
Heating oil	\$ 13,000	\$ 16,371	\$ 16,371	\$ 13,000	\$ 3,371
Garbage removal	\$ 2,000	\$ 1,980	\$ 1,980	\$ 2,000	\$ (20)
Outside contractors	\$ 100	\$ 475	\$ 475	\$ 100	\$ 375
Gas & Water	\$ 250	\$ 95	\$ 95	\$ 250	\$ (155)
Supplies	\$ 2,500	\$ 2,355	\$ 2,355	\$ 2,500	\$ (145)
Other	\$ 1,500	\$ 7,774	\$ 7,774	\$ 1,500	\$ 6,274
<b>Total Property Support</b>	\$ 217,273	\$ 240,588	\$ 240,588	\$ 217,273	\$ 23,315
<b>Department of Communications and Ministries</b>					
Printing, copying and postage "TOC"	\$ -	\$ -	\$ -	\$ -	\$ -
The Orthodox Church - Stipends	\$ 42,700	\$ 42,700	\$ 42,700	\$ 42,700	\$ -
Contract web master	\$ 33,000	\$ 50,515	\$ 50,515	\$ 33,000	\$ 17,515
Website hosting and maintenance	\$ 5,500	\$ 6,941	\$ 6,941	\$ 5,500	\$ 1,441
Benefits(Medical, Unemployment, Pension)-TOC	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Department of Communications and Ministries</b>	\$ 81,200	\$ 100,156	\$ 100,156	\$ 81,200	\$ 18,956
<b>Department of External Affairs</b>					
Salaries - External Affairs	\$ 35,999	\$ 35,999	\$ 35,999	\$ 35,999	\$ -
St. Catherines - Stipends	\$ 45,600	\$ 40,810	\$ 40,810	\$ 45,600	\$ (4,790)
Interchurch travel	\$ 27,600	\$ 31,506	\$ 31,506	\$ 27,600	\$ 3,906
St Catherine's Moving/Apt Rental	\$ -	\$ 10,401	\$ 10,401	\$ -	\$ 10,401
Telephone & office expense	\$ 4,100	\$ 4,418	\$ 4,418	\$ 4,100	\$ 318
Benefits - External Affairs(Medical, Unempl, Pension)	\$ 2,912	\$ 2,770	\$ 2,770	\$ 2,912	\$ (142)
Other interchurch organizations	\$ 10,000	\$ 10,853	\$ 10,853	\$ 10,000	\$ 853
<b>Total Department of External Affairs</b>	\$ 126,211	\$ 136,757	\$ 136,757	\$ 126,211	\$ 10,546
<b>Department of History and Archives</b>					
Salaries	\$ 64,819	\$ 64,819	\$ 64,819	\$ 64,819	\$ -
Payroll Taxes	\$ 4,958	\$ 4,958	\$ 4,958	\$ 4,958	\$ -
Benefits(Medical, Unemployment, Pension)	\$ 30,128	\$ 33,094	\$ 33,094	\$ 30,128	\$ 2,966
Archives Project - from Archives Fund	\$ -	\$ -	\$ -	\$ -	\$ -
Supplies/Travel	\$ 1,763	\$ 1,598	\$ 1,598	\$ 1,763	\$ (165)
<b>Total Department of History and Archives</b>	\$ 101,668	\$ 104,469	\$ 104,469	\$ 101,668	\$ 2,801
<b>PCC Expenses</b>	\$ -	\$ -	\$ -	\$ -	\$ -
Theological Education	\$ 1,200	\$ 5,351	\$ 5,351	\$ 1,200	\$ 4,151
St Sergius Chapel	\$ 6,200	\$ 12,137	\$ 12,137	\$ 6,200	\$ 5,937
Ordination Candidate Psychological Testing	\$ 20,400	\$ 4,910	\$ 4,910	\$ 20,400	\$ (15,490)
Planting Grants	\$ 74,350	\$ 74,350	\$ 74,350	\$ 74,350	\$ -
Seminary Support	\$ 18,000	\$ 18,000	\$ 18,000	\$ 18,000	\$ -
ORSMA	\$ 60,930	\$ 53,156	\$ 53,156	\$ 60,930	\$ (7,774)
Strategic Planning-Continuing Education	\$ 9,000	\$ 13,889	\$ 13,889	\$ 9,000	\$ 4,889
<b>TOTAL OPERATING EXPENSES</b>	\$ 1,748,201	\$ 1,813,674	\$ 1,813,674	\$ 1,748,201	\$ 65,473
<b>NET OPERATING SURPLUS(DEFICIT)</b>	\$ 13,143	\$ (55,545)	\$ (55,545)	\$ 13,143	\$ (68,688)
<b>Stewards Income &amp; Expenses</b>					
Stewards of the OCA Revenue	\$ 85,091	\$ 90,186	\$ 90,186	\$ 85,091	\$ 5,095

	<b>FINAL Budget 2018</b>	<b>Actual 2018</b>	<b>Actual Thru 12/31/2018</b>	<b>Budget 12/31/2018</b>	<b>Variance to Budget</b>
Diaconal Vocations Revenue	\$ 8,000	\$ 3,200	\$ 3,200	\$ 8,000	\$ (4,800)
Program Fees	\$ 3,000	\$ 5,600	\$ 5,600	\$ 3,000	\$ 2,600
Dividends & Interest(net of investment fees)	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total SOCA Income</b>	<b>\$ 96,091</b>	<b>\$ 98,986</b>	<b>\$ 98,986</b>	<b>\$ 96,091</b>	<b>\$ 2,895</b>
<b>Stewards of the OCA</b>					
Ministries Conference	\$ -	\$ -	\$ -	\$ -	\$ -
SOCA Printing and Mailing Expense	\$ -	\$ 1,858	\$ 1,858	\$ -	\$ 1,858
<b>TOTAL SOCA Expense</b>	<b>\$ -</b>	<b>\$ 1,858</b>	<b>\$ 1,858</b>	<b>\$ -</b>	<b>\$ 1,858</b>
<b>Net SOCA Income(Deficit)</b>	<b>\$ 96,091</b>	<b>\$ 97,128</b>	<b>\$ 97,128</b>	<b>\$ 96,091</b>	<b>\$ 1,037</b>
<b>Departmental Expenses</b>					
Department of Institutional Chaplaincy	\$ 8,125	\$ 7,457	\$ 7,457	\$ 8,125	\$ (668)
Department of Evangelization	\$ 10,600	\$ 10,992	\$ 10,992	\$ 10,600	\$ 392
Department of Liturgical Music & Translations	\$ 12,000	\$ 11,933	\$ 11,933	\$ 12,000	\$ (67)
Department of Pastoral Life & Vocational Development	\$ 10,000	\$ 6,896	\$ 6,896	\$ 10,000	\$ (3,104)
Department of Christian Education	\$ 10,902	\$ 9,669	\$ 9,669	\$ 10,902	\$ (1,233)
Department of Youth and Young Adults	\$ 26,700	\$ 14,377	\$ 14,377	\$ 26,700	\$ (12,323)
Diaconal Vocations Program	\$ 15,250	\$ 12,422	\$ 12,422	\$ 15,250	\$ (2,828)
Department of Christian Service	\$ 10,575	\$ 13,951	\$ 13,951	\$ 10,575	\$ 3,376
<b>Total Departmental Expenses</b>	<b>\$ 104,152</b>	<b>\$ 87,697</b>	<b>\$ 87,697</b>	<b>\$ 104,152</b>	<b>\$ (16,455)</b>
<b>HONESDALE LOAN PRINCIPAL PAYMENTS</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Total Net Income(Deficit)</b>	<b>\$ 5,082</b>	<b>\$ (46,114)</b>	<b>\$ (46,114)</b>	<b>\$ 5,082</b>	<b>\$ (51,196)</b>
<b>Extraordinary Items:</b>					
	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Net Income(Deficit)</b>	<b>\$ 5,082</b>	<b>\$ (46,114)</b>	<b>\$ (46,114)</b>	<b>\$ 5,082</b>	<b>\$ (51,196)</b>
<b>Unrestricted Funds:</b>					
Net Operating Surplus/(Deficit)	\$ 5,082	\$ (46,114)	\$ (46,114)	\$ 5,082	\$ (51,196)
Add Back Non-Cash Items (Depreciation & Amort)	\$ 16,325	\$ 21,301	\$ 21,301	\$ 16,325	\$ 4,976
<b>Total Operating Surplus/(Deficit) - Unrestricted</b>	<b>\$ 21,407</b>	<b>\$ (24,813)</b>	<b>\$ (24,813)</b>	<b>\$ 21,407</b>	<b>\$ (46,220)</b>
<b>Temporarily Restricted Funds:</b>					
<b>Revenues:</b>					
- Charity	\$ 5,000	\$ 1,120	\$ 1,120	\$ 5,000	\$ (3,880)
- Missions & Church Planting Grants	\$ 5,000	\$ 1,625	\$ 1,625	\$ 5,000	\$ (3,375)
- Seminary	\$ 5,000	\$ 5,284	\$ 5,284	\$ 5,000	\$ 284
- Kavalenko Trust	\$ 3,000	\$ -	\$ -	\$ 3,000	\$ (3,000)
- Youth Director Pledge	\$ -	\$ 53,427	\$ 53,427	\$ -	\$ 53,427
- Grants	\$ -	\$ 174,000	\$ 174,000	\$ -	\$ 174,000
- Kavalenko Trust	\$ 3,000	\$ (2,790)	\$ (2,790)	\$ 3,000	\$ (5,790)
- All American Council	\$ 370,250	\$ 422,436	\$ 422,436	\$ 370,250	\$ 52,186
- Other Bequests	\$ 2,000	\$ 4,150	\$ 4,150	\$ 2,000	\$ 2,150
<b>Total Temporarily Restricted Revenues</b>	<b>\$ 393,250</b>	<b>\$ 659,252</b>	<b>\$ 659,252</b>	<b>\$ 393,250</b>	<b>\$ 266,002</b>
<b>Expenses:</b>					
- Charity	\$ 5,000	\$ 3,006	\$ 3,006	\$ 5,000	\$ (1,994)
- Mission School	\$ -	\$ -	\$ -	\$ -	\$ -
- Church Planting Grants	\$ 5,000	\$ 20,983	\$ 20,983	\$ 5,000	\$ 15,983
- Seminary	\$ 5,000	\$ 3,202	\$ 3,202	\$ 5,000	\$ (1,798)
- Kavalenko Trust	\$ 4,350	\$ 3,505	\$ 3,505	\$ 4,350	\$ (845)
- All American Council (including PCC)	\$ 363,880	\$ 352,342	\$ 352,342	\$ 363,880	\$ (11,538)
- Other (Release from Restrictions)	\$ -	\$ 119	\$ 119	\$ -	\$ 119
<b>Total Temporarily Restricted Disbursements</b>	<b>\$ 383,230</b>	<b>\$ 383,157</b>	<b>\$ 383,157</b>	<b>\$ 383,230</b>	<b>\$ (73)</b>
<b>Net Temporarily Restricted Surplus/(Deficit)</b>	<b>\$ 10,020</b>	<b>\$ 276,095</b>	<b>\$ 276,095</b>	<b>\$ 10,020</b>	<b>\$ 266,075</b>

	<b>FINAL Budget 2018</b>	<b>Actual 2018</b>	<b>Actual Thru 12/31/2018</b>	<b>Budget 12/31/2018</b>	<b>Variance to Budget</b>
<b>Permanently Restricted Funds:</b>					
<b>Revenue:</b>					
- St Andrew's Endowment	\$ 1,000	\$ (14,508)	\$ (14,508)	\$ 1,000	\$ (15,508)
- Mission Endowment	\$ 4,000	\$ (103,901)	\$ (103,901)	\$ 4,000	\$ (107,901)
- Main Endowment	\$ 4,000	\$ (91,808)	\$ (91,808)	\$ 4,000	\$ (95,808)
- FOS Endowment	\$ 1,000	\$ (11,010)	\$ (11,010)	\$ 1,000	\$ (12,010)
<b>Total Revenues</b>	\$ 10,000	\$ (221,227)	\$ (221,227)	\$ 10,000	\$ (231,227)
<b>Funds Released:</b>					
- St Andrew's Endowment	\$ -	\$ 546	\$ 546	\$ -	\$ 546
- Mission Endowment	\$ -	\$ 4,900	\$ 4,900	\$ -	\$ 4,900
- Main Endowment	\$ -	\$ 6,386	\$ 6,386	\$ -	\$ 6,386
- FOS Endowment	\$ -	\$ 401	\$ 401	\$ -	\$ 401
<b>Total Funds Released</b>	\$ -	\$ 12,233	\$ 12,233	\$ -	\$ 12,233
<b>Net Permanently Restricted Surplus/(Deficit)</b>	\$ 10,000	\$ (233,460)	\$ (233,460)	\$ 10,000	\$ (243,460)
<b>Total Change in Net Assets</b>	\$ 25,102	\$ (3,479)	\$ (3,479)	\$ 25,102	\$ (28,581)

Stewards of the Orthodox Church in America  
Metropolitan Council Winter/Spring 2019  
REPORT

**Where we stand**

The Stewards of the OCA achieved, and exceeded its goal of \$85.0k, with a total income of \$90.1k.

**What we did**

In the second half of 2018 we implemented two appeals. The first was Steward Sunday on Sunday October 28. The second was Giving Tuesday on Tuesday November 27. In conjunction with Steward Sunday we deployed our first direct mail appeal to individuals who have not given in the past. The Steward Appeal consisted of web postings and direct email. We did not send a direct mailing to parishes as we did last year.

The second appeal was on Giving Tuesday. We used videos created by youth attendees to the AAC as the content for the Giving Tuesday appeal.

**The Numbers**

Number of total donors (Parish and Individual) = 400+

Number of individual donors following Steward Sunday Appeal = 58

Number of parish donors following Steward Sunday Appeal = 37

**What we plan to do in 2019**

1. **Steward Sunday Appeal:** Sunday October 27

2. **Giving Tuesday Appeal:** Tuesday December 3

3. **Relationship building:** we will continue to build relationships with individuals to grow the rolls of Stewards, especially in the monthly giving category. We currently have 2,305 very active subscribers to the OCA Review. Our click rate for that distribution list is 50.3%. We will work to convert those subscribers who are not giving into donors.

3. **Content:** You may have noticed that any posting on the OCA website that relates to our ministry departments includes a note like this: *The Orthodox Church in America and its Department of Youth, Young Adult and Campus Ministry, together with the Stewards of the Orthodox Church in America [SOCA], provide partial funding for the ongoing work of OCF. For additional information on SOCA or to make a donation, please visit the OCA web site.*

We will also work with the web team to create/recycle content related to stewardship to be posted on oca.org, and in the OCA Review.

4. **Special Projects/Appeals:** recently the Archives Committee has developed a list of 100+ individuals who are known to have interest in supporting the work of the archives. The Stewards has offered its help in reaching out to these individuals for a special appeal related to the archive project with the hope that a one-time donor to a special appeal can become a monthly or annual giver.





Pension Office  
P.O. Box 675  
Syosset, NY 11791  
Tel: 516-922-0550  
Fax: 516-624-3153  
Email: pension@oca.org

February 14, 2019

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 December 31, 2018. The net time-weighted return on core investments managed by Morgan Stanley from December 31, 2017 to December 31, 2018 was -9.14% compared to our benchmark of -5.14%. The net time-weighted return for the period December 31, 2016 to December 31, 2018 on core investments managed by Morgan Stanley was 1.85 % compared to our benchmark of 4.34%. 2018 was challenging and saw significant volatility return to the financial markets. The S&P 500 recorded its worst quarter since 2011 and in December, it's worst month since February, 2009. International markets fared slightly better than the U.S., but overall it was a dismal quarter for the markets. The bond market posted mild gains in the fourth quarter during an equity market route, but lost money for the year as well. The ending market value of plan assets at December 31, 2018 was \$22,530,277.

During the fourth quarter, the Plan Administrator, Maureen Ahearn resigned from the pension office to pursue an employment opportunity elsewhere. The Board wishes to express it's deepest gratitude to Maureen for her many years of excellent service and wish her continued success in her new position. Barbara Anderson, the pension office bookkeeper was selected by the Board to be the Acting Pension Administrator during this period of transition. Members of the plan should address any questions or concerns directly to Barbara.

Additional items discussed at it's December meeting included clergy participation compliance in the plan and proposed amendments to the plan regarding contribution levels, beneficiary and disability benefits.

With regard to participation in the Pension Plan, there are currently 389 active participating members and 193 monthly benefits recipients.

Respectfully Submitted,

Priest Gleb McFatter, Chairman

**ORTHODOX CHURCH IN AMERICA PENSION PLAN  
PROPOSED PLAN AMENDMENT – TO PERMIT  
DESIGNATION OF BENEFICIARY**

Current Plan Provision: Section 1.9 of the Orthodox Church in America Pension Plan (“Plan”) currently limits the naming of a beneficiary to a natural person, a church affiliated with the OCA, or to the Plan. The language is ambiguous with respect to whether such a gift might be made through a trust for the benefit of a natural person.

Proposed Change: In order to address the concern that a trust might be used to protect contingent beneficiaries who would benefit from such stewardship over assets and to provide additional options to Members, the Pension Board proposes that Plan section 1.9(b) be amended as follows:

**PROPOSED AMENDMENT:**

**1.9 "Beneficiary"**

- (a) The person designated by a Member to receive payments after the Member's death under an optional form of benefit described in Article 6; under the return of contributions described in Article 7, Section 3.2 and Subsection 8.2(b)(i); or under the Normal Form of Retirement Income described in Section 1.22. Effective January 1, 2009, the Beneficiary of a Member who is married shall be his Spouse. A Member who is married but who seeks to designate a person other than his spouse to receive payments after his death may, with the written consent of his Spouse (which consent must be duly notarized), change his designated Beneficiary at any time, but no designation shall be effective unless filed with the Pension Board. If no Beneficiary has been designated, or the designation is defective, the balance shall be paid to the Member's estate. Such person is the designated beneficiary under Code Section 401(a)(9) and Treasury Regulation Section 1.401(a)(9)-4.
  
- (b) A Member or a Member's Beneficiary entitled to designate a person or entity to receive any remaining payments of the 120 payments of the Normal Form of Retirement Income after the Member's (or Beneficiary's) death, may designate the person or entity to which payments are to be made including to an organization affiliated with the Orthodox Church of America or to the Plan for the benefit of other Members.

APPROVED: \_\_\_\_\_ Date: \_\_\_\_\_

**ORTHODOX CHURCH IN AMERICA PENSION PLAN  
PROPOSED PLAN AMENDMENT – TO MAINTAIN  
CONTRIBUTION LEVEL**

Current Plan Provision: Section 3.1 of the Orthodox Church in America Pension Plan (“Plan”) currently provides for an Employer contribution based upon a percentage (currently 8%) of “the Member’s Compensation.” Similarly, Section 3.2(a) provides for a Member Contributions based upon “6% of his Compensation.” Subsequent to the establishment of this contribution rate, the Plan was amended to provide for in-service distributions beginning at age 75. At the time of the Plan amendment Plan section 1.28 was amended to exclude the Member’s retirement benefit from being treated as a Member’s compensation on the expectation that the Member’s compensation for services was not being offset by receipt of the Retirement benefit. It has come to the Board’s attention that certain Employers are contemplating reducing a Member’s compensation by offsetting some, or all, of the in-service Retirement benefit. Such a practice would have an adverse effect upon the funding of the Plan.

Proposed Change: In order to avoid adversely affecting the funding of the Plan, the Proposed Amendment will modify section 1.28 to treat the in-service retirement benefit as a Member’s compensation when the Member’s compensation is reduced from his compensation level before commencing to receive his benefit; the compensation level being determined as his/her average monthly compensation paid during any contiguous twenty-four month period in the sixty months prior to his/her commencing his/her in-service benefit.

The proposed amendment is shown in red-line format below.

**PROPOSED AMENDMENT:**

**1.28 "Retirement"**

The termination of employment of a Member on his Normal, Deferred or Disability Retirement Date. A Member who has not earlier retired shall be treated as having terminated employment on the first day of the month coincident with or immediately following his seventy-fifth (75<sup>th</sup>) birthday for the purpose of enabling commencement of a benefit while otherwise remaining Employed (including remaining Employed and having Compensation for purposes of being obligated to contribute to the Plan with respect to such Employment)(herein, the “in-service benefit”). The Pension received by a Member shall not be treated as Compensation for purposes of determining contributions due to the Plan or for determining benefit accruals so long as the Member’s compensation with respect to his/her employment paid with respect to any month after his/her benefit commences is not reduced below his/her average monthly compensation paid during any contiguous twenty-four month period in the sixty months prior to his/her commencing his/her in-service benefit.

APPROVED: \_\_\_\_\_ Date: \_\_\_\_\_

**ORTHODOX CHURCH IN AMERICA PENSION PLAN  
PROPOSED PLAN AMENDMENT – TO PERMIT  
INCREASE OF DISABILITY BENEFIT**

Current Plan Provision: the language of Section 4.3 of the Orthodox Church in America Pension Plan (“Plan”) does not clearly state that a Member’s Accumulated Voluntary Contribution Account might be used to increase a Disability Retirement Benefit before a Member reaches his/her Normal Retirement Date.

Proposed Change: The proposed change is intended to make clear that a Member’s Accumulated Voluntary Contribution Account might be used to increase a Disability Retirement Benefit before a Member reaches his/her Normal Retirement Date.

**PROPOSED AMENDMENT:**

**4.3 Upon Disability Retirement**

Upon Retirement at his Disability Retirement Date, a Member shall be entitled to receive his Accrued Benefit as of such Retirement Date actuarially increased by some, or all, of the Member’s Accumulated Voluntary Contribution Account. When a Member who is receiving a Disability Retirement Benefit reaches his Normal Retirement Date, the Disability Retirement Benefit shall end and the Member shall be immediately eligible to receive his Normal Retirement Benefit except that the monthly payments received as the Disability Retirement Benefit shall be counted as monthly payments for the purpose of counting the 120 monthly payments of the Normal Form of Retirement Income. A Member receiving a Disability Retirement Benefit shall apply for his Normal Retirement Benefit within 90 days of becoming eligible for a Normal Retirement Benefit and may elect among the forms of benefit available

APPROVED: \_\_\_\_\_ Date: \_\_\_\_\_

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**ORTHODOX CHURCH IN AMERICA**  
**PENSION PLAN**  
**SECURING YOUR FUTURE**

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# Plan Facts

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- Established on January 1, 1976 to provide a retirement income to priests and other full-time employees.
- Restated as of January 1, 2014.
- Defined benefit “church plan”

# Who's Who

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## Pension Board and Trustees

- Episcopal Moderator
- Three clergy members
- Three lay people

## Consultants

- Counsel
- Accountant
- Actuary
- Investment Manager

## Office Staff

- Pension Administrator
- Pension Bookkeeper

# Plan Membership

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## Clergy

Becomes an eligible member as of hire date

Cannot join after age 60

All American Council has required participation for all clergy

## Lay person

First of the month after hire date

Must work 20 or more hours per week

Cannot join after age 60

# Contributions

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## Member Contributions

- Mandatory Contribution: 6% of pensionable compensation
- Voluntary Contributions: 1-10% of pensionable compensation

## Employer Contributions

- Mandatory Contribution: 8% of pensionable compensation

## Pensionable Compensation

- Cash salary (excluding living allowance, automobile allowance and all other forms of living expenses)
- Housing allowance (as per Code Section 107) for all clergy and for laypeople required to accept employer housing

**All contributions are paid monthly**



# Retirement Options

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## Normal Retirement

- at age 65 or beyond
- Normal Retirement Benefit

## Early Retirement

- prior to age 65
- Termination Benefit

## Disability Retirement

- five years of participation required

## In-Service Retirement

- at age 75 or beyond
- receive benefit while working

# Normal Retirement

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2% of pensionable compensation  
for every month of participation

+

Any periodic adjustments  
awarded by the Pension Board  
and Metropolitan Council

# Example

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If your monthly pensionable compensation is \$4,000 in 2017 and \$4,200 in 2018, as of December 31, 2018, you will earn a monthly pension (beginning at age 65) as follows:

2017 compensation \$4,000 x 2%	\$80
<u>2018 compensation \$4,200 x 2%</u>	<u>\$84</u>
Monthly Pension Earned	\$164

Any future retirement benefits you earn from the plan would be added to this amount.

# Payment Options: Normal Retirement

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## Single at Retirement

Pension paid for life with the first 120 monthly payments guaranteed

## Married at Retirement

Pension paid for life with the first 120 monthly payments guaranteed

Surviving spouse receives lifetime pension equal to 65% of pension you received prior to death after 120 payments are completed

## Optional Forms of Payment

50% or 100% survivor pension

# Disability Benefits

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## Eligibility

After five years of participation

Eligible for Social Security Disability Benefits

## Monthly Pension

Equal to the total benefit earned as of your date of disability

## Death Benefit

Surviving spouse receives lifetime benefit equal to 65% of your pensionable compensation as of date of disability.

## Duration

Benefits paid as long as you are disabled

Evidence of on-going disability will be verified regularly.

# Vesting and Termination Benefits

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## Member and Voluntary

### Contribution Accounts

always 100% vested

## Employer Contribution Account

Years of plan membership	Vested Percentage
Less than 5	0%
5	10%
6	20%
7	30%
8	40%
9	50%
10	60%
11	70%
12	80%
13	90%
14 or more	100%

# Termination Benefits

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## Less than 5 years of service when you stop working

Employer Contribution Account is forfeited

Total value of Member and Voluntary Contribution Accounts paid as a lump sum.

## 5 or more years of service when you stop working

When you turn 65

- Member Contribution Account and vested Employer Contribution Account used to provide a lifetime monthly pension beginning at age 65.
- Voluntary Contribution Account paid as lump sum.

Before you turn 65

- Member Contribution Account and Voluntary Contribution Account paid in a single lump sum or as a monthly annuity
- Employer Contribution Account is forfeited

# Survivor Benefits

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## If you die before your pension begins

Member and Voluntary Contribution Accounts paid to your beneficiary in a lump sum.

Spouse will receive spouse's benefit in addition to the sum above.

- If you die before 65, she will receive a monthly benefit equal to 65% of what you would have been eligible for at retirement less than the value of any contributions paid to your beneficiary.
- If you die at or after 65, your spouse or other beneficiary will receive 120 monthly payments equal to 100% of the pension you would have received at retirement. Your spouse will then receive monthly payments equal to 65% of your pension for the rest of her life.
- Benefit is offset by the value of the lump sum paid to the beneficiary.

## If you die after your pension begins

Survivor benefits will depend on the form of pension you selected at retirement.



# Policies for Retired Clergy

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## Serving Missions

- serve in a mission parish without affecting pension
- one parish for a total of two years
- parish must be in existence less than 5 years and must be servicing fewer than 50
- less than \$2000/month (\$24,000/year) total compensation

## Temporary Service

- may be compensated for service in any one OCA parish on a temporary basis for up to one month
- After one month, retirement benefit stops and contributions to the Plan resume.
- Benefit is reevaluated upon subsequent retirement.

## Parsonage Designation

- clergy may designate up to 100% of the amount of pension benefits used for expenses directly related to providing a home that qualify for exclusion from taxable income pursuant to Section 107 of the Internal Revenue Code of 1986, as amended.

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Q & A

**CURRENT LEGAL MATTERS OF THE ORTHODOX CHURCH IN AMERICA:  
A JOINT REPORT OF THE LEGAL COMMITTEE OF THE METROPOLITAN  
COUNCIL AND THE GENERAL COUNSEL OF THE ORTHODOX CHURCH OF  
AMERICA**

*2019 Spring Session of the Metropolitan Council of the Orthodox Church in America  
February, 2019*

This Report is submitted to the Metropolitan Council as a joint statement of the Legal Committee of the Metropolitan Council and the General Counsel of the Orthodox Church in America.

### **Current Litigation**

#### **Romanian Episcopate v. Irineu Duvlea and Holy Trinity Monastery**

The former Bishop Irineu was deposed by the Synod in June 2017; the former Bishop retained possession and control of the properties of Holy Ascension Monastery in Clinton, Michigan, for which reason the Episcopate filed a civil action to dispossess Irineu from the property of the monastery. He in turn, filed suit against the Episcopate seeking a declaratory judgment in his favor as to the ownership, possession, control of the monastery properties. These actions were consolidated into a single proceeding by the Washtenaw Circuit Court. That court subsequently granted a motion of Irineu for summary disposition of the case. The Episcopate filed its appeal from this order in the Michigan Court of Appeals, to which appeal Irineu responded. We now await a ruling in that matter which still pends before the Michigan Court of Appeals. GC is working closely with Archbishop Nathaniel, the Episcopate and our retained counsel in Ann Arbor on this matter. We anticipate a ruling by the Michigan Court of Appeals in this matter in the first half of 2019.

#### **Romanian Episcopate v. Gheorghe Carstea**

St. Nicholas Romanian Church was established in Troy, Michigan, as an independent parish in October 1955. It subsequently affiliated itself with the Romanian Orthodox Episcopate of America and the OCA in July 1970. Gheorghe Carstea, a Romanian priest in the United States, was admitted on his petition to the ranks of the clergy of the OCA and the Episcopate in July 1986. Carstea was subsequently found in October 2016 to have committed gross financial improprieties in its management of Parish bank accounts and was suspended and retired for this reason by Archbishop Nathaniel on the recommendation of the Spiritual Consistory of the Episcopate. He was later deposed from the priesthood by the Holy Synod in November 2017. Prior to his deposition, a vote was taken on April 10, 2014, in St. Nicholas Church which purported to secede from the Episcopate and to retain Carstea as its “parish priest.” The Episcopate subsequently filed suit against Carstea in the Circuit Court for Oakland County, Michigan, for possession and control of the properties of St. Nicholas Church. Carstea thereafter filed his counterclaim in that action to quiet the title of St. Nicholas Church property in the name

of “St. Nicholas and Venerable Parascheva Church” which had been incorporated by Carstea on March 30, 2018. After the filing of initial pleadings, the Episcopate filed its motion for summary disposition of this matter and a hearing on this motion was held by the Trial Court in Oakland County, Michigan, on December, 12, 2018. Concurrently, the Episcopate had authorized its Michigan counsel to prepare and file a motion for interlocutory relief (i.e., immediate possession of the properties in Troy, Michigan). After the hearing by the trial court on December 14, 2018, the trial court denied relief to the Episcopate. The Episcopate then filed its Motion for reconsideration of the negative order of the court following the December 14, 2018, hearing. The trial court has now denied this motion. The Episcopate is now preparing an application to the Michigan Court of Appeals for an immediate review of the negative rulings of the Trial Court in this matter.

GC is working closely with Archbishop Nathaniel, the Episcopate, and Michigan counsel in Ann Arbor. Parenthetically it should be noted that Carstea has now affiliated himself and those supporting him as a parish within the “Romanian Orthodox Exarchate of North and South America,” an entity incorporated in Michigan by the former Bishop Irineu.

**Participation in Amicus Brief: The American Legion v. American Humanist Association (Case Number 17-1717) and Maryland National Public Capital Park and Planning Commission v. American Humanist Association (Case Number 18-18) in the Supreme Court of the United States**

The Holy Synod of Bishops has approved the participation of the Orthodox Church in America to appear in the capacity of Amicus Curiae in the above-captioned case now pending in the Supreme Court of the United States on certiorari from the Fourth Circuit Federal Court of Appeals.

In the consolidated cases of *The American Legion v. American Humanist Association* (Case Number 17-1717) and *Maryland-National Public Capital Park and Planning Commission v. American Humanist Association* (Case Number 18-18), the Fourth Circuit issued a decision prohibiting the expenditure of public funds for the maintenance of a World War I memorial in the shape of a cross, a memorial which had been first erected some 93 years ago. In these actions, the American Humanist Association took the position that the expenditure of public monies for this purpose had the primary effect of endorsing religion and excessively entangled the government in religion, thus violating the Establishment Clause of the United States Constitution.

A primary issue in these consolidated proceedings is whether or not the 93-year-old memorial to the fallen of World War I is unconstitutional merely because it is shaped like a cross. This issue entails a construction by the Supreme Court of its test under *Lemon v. Kurtzman*, 403 U.S. 602 (1971) in which, inter alia, the passive nature of such a memorial in itself serves to negate any inference of governmental endorsement of religion.

The Ethics and Religious Liberty Commission, the Lutheran Church-Missouri Synod, and the Church of Jesus Christ of Latter-Day Saints have joined the American Legion and the Maryland-

National Public Capital Park and Planning Commission in support of their position in this litigation. OCA General Counsel is informed that the United States Conference of Catholic Bishops and the Church of God in Christ, Inc., have joined this litigation as Amici Curiae as well.

This matter is of great interest to the Orthodox Church in America. If the Fourth Circuit Court of Appeals is not reversed in this case, the decision of that Circuit will lend weight to the argument that any public display of any fixture having even the remotest connection with a religious matter constitutes in and of itself a governmental endorsement of religion, however passive such display might be and without regard to the minimal character of any expenditure of public funds made in that connection.

### **Potential Litigation**

An attorney has been retained by a former Priest of the Orthodox Church in America who was deposed by action of Holy Synod in October, 1990. The attorney representing the former priest has made explicit indications that his client intends to file a civil action in a State court regarding this matter. General Counsel is maintaining continuing liaison with the Metropolitan regarding this threat of civil litigation.

### **Other Matters**

#### **All American Council**

General Counsel has collaborated with the Chancellor and the Secretary in concluding a tentative arrangement with Baltimore Hotel Inner Harbor to host the upcoming All American Council, subject to the approval of the Metropolitan Council and the blessing of the Holy Synod of Bishops.

#### **New York Regulation of Employers Sexual Harassment Policies**

Effective October 9, 2018, Gov. Cuomo in coordination with the New York State Department of Labor has promulgated administrative regulations regarding a state-mandated Policy for the Prevention of Sexual Harassment applicable to all employers in the State of New York. This matter is somewhat complex and convoluted and GC has reached out to the SMPAC, through the Chancellor, to begin a coordinated response to the requirements of this directive on the part of all impacted OCA and OCA-affiliated entities.

The new New York State regime is lengthy, but it entails four fundamental and basic components:

1. The adoption and distribution to employees by all New York employers of a **Policy in Prevention of Sexual Harassment in the Working Place**, required as of October 9, 2018. The

distribution of this Policy to employees can be accomplished electronically. GC in coordination with the Chancellor, the Secretary, and SMPAC has already developed a Policy for the OCA in compliance with this State directive and this policy was adopted by the Holy Synod at its fall meeting, 2018. It was the judgment of OCA General Counsel that the current PSPs of the OCA are consistent with the requirements of the Policy now required by the State of New York but that the State model policy is more extensive, detailed and pervasive hence the need for the adoption of a separate and distinct OCA Policy in this regard.

## **2. Mandatory Posting of Policy**

Employees of New York employers must be made aware of the Policy of the employer. A quick reading of the administrative directive in this respect indicates that the posting requirement may be met by a physical posting in the place of employment or by electronic transmission to each employee. It does not appear necessary that the employer obtain a signed acknowledgment of receipt of the Policy by employees although the State “encourages” that such a signed copy of the Policy be obtained from each employee.

3. A **Complaint Form** must be developed by the employer and made accessible to each employee.

4. No later than October 9, 2019, employees of each New York employer must complete **sexual harassment prevention training** that meets or exceeds the minimum standards under the law made effective on October 9, 2018. In order to comply with this annual training requirement, New York. Employers may either (1) adopt the State’s model training script, slides, and case studies; or (2) each Employer must provide other live training or interactive online/video training that meets or exceeds the laws minimum standards for training.

The scope of this law is such that every employer in the State of New York must comply with the administrative directives of the new anti-sexual harassment state regulation. This would appear to encompass the OCA as an employer (inclusive of all employees in the Chancery); the Diocese of New York/New Jersey; all parishes of the Diocese which have employees; and all other “employers” within the State of New York, including – but not limited to – seminaries and monasteries.

Shortly after the adoption of the necessary administrative Policy for the OCA by the Holy Synod of Bishops, His Eminence Archbishop Michael moved quickly to implement the requirements of the new administrative regime in the Diocese of New York and New Jersey. The requisite Policy statement regarding the prevention of sexual harassment in the workplace has already been adopted by that Diocese for application in its New York-based parishes and the further implementation of the other requirements of the State administrative regime is well underway, this under the leadership of Archimandrite Joseph who is acting as a state-wide coordinator for the Diocese.

The new administrative regime of the State of New York will be the object of intense review and consideration by the SMPAC, the ORSMA, and GC in the near-term future in order to ensure that the OCA and its constituent elements impacted by the new regime are compliant as required by law.

### **Liaison with Metropolitan and with Chancery Restructuring Committee**

General Counsel has established a continuing liaison with the Committee appointed by the Metropolitan respecting the reorganization of administrative functions within the Chancery of the Orthodox Church in America, especially with regard to implications of the New York Not-For-Profit Corporation Law. GC has been in contact with Bishop Daniel and with Father John (Dresko) regarding the work of this Committee and its impact on the methods of delivery of legal services to the Orthodox Church in America. At the concluding session of the meeting of the Metropolitan Council at its Fall, 2018, session, His Beatitude at that time submitted to the MC certain interim work product generated by this Committee, including draft “job descriptions” of the Chancellor, the Chancery Administrator, and the Treasurer. The Chancery Restructuring Committee has also taken under its review the relationship of the delivery of legal services to the broader administrative structure of the Orthodox Church in America.

### **OCA Policy on Access to Clerical and Employee Personnel Files**

GC is coordinating with the Secretary of the OCA on the promulgation of an OCA Policy on Access to Personnel Files, a matter which will be addressed at this session of the Metropolitan Council by the OCA Secretary. GC has determined that draft legislation was considered by the New York legislature in its last session which may impact the substantive content of any proposed OCA Policy on this matter.

### **Copyright Permission: Springer Publishing Company**

General Counsel collaborated with the Secretary of the OCA with respect to a request for permission submitted by MPS North America on behalf of Springer Publishing Company for the reproduction of OCA-copyrighted materials in its forthcoming volume, “Fast Facts about Religion for Nurses: implications for Patient Care.”

### **OCA Statute (2015) Compliance Activity**

General Counsel continues when requested to review and suggest revisions of both parish and diocesan by-laws to ensure compliance with the provisions of the Statute of the OCA as adopted in Atlanta in 2015.

### **Continuing Research Projects:**

Although matters of a greater urgency have taken much of my time since the last meeting of the Holy Synod, I continue to make intermittent progress on a number of matters with legal import with a view towards developing proposed policies for submission to the Holy Synod. These have included:

**Civil Marriage and Its Relation to the Sacrament of Holy Matrimony** (i.e., the possible promulgation of a policy by the Holy Synod, requiring the conclusion of a civil

marriage by parties seeking the Sacrament of Holy Matrimony. Prior to the administration of the sacrament as a means of eliminating the role of clergy as agents of the State in this respect).

**Confession and Mandatory Reporting** (i.e., the potential conflict between state-mandated reporting requirements regarding sexual misconduct and particularly child sexual abuse and the canonical provisions respecting the confidentiality of matters revealed by individuals in the Sacrament of Penance)

**Mediation Platform for the OCA** [I continue to develop a research file regarding existing mediation platforms for use in the context of intra-church disputes].

### **Lilly Grant**

I was happy to have the opportunity to review the terms and conditions of the recent grant by the Lilly Foundation in support of pastoral training. I found the terms of that grant to be most liberal and I did not sense any legal implications and those provisions. I was particularly impressed by the terms of this grant, which permit a period of grace to the Grantee in order to resolve any potential elements of non-compliance with the grant requirements.

### **Archives Grant**

An application for the grant of \$49,000 in support of OCA archives improvement and maintenance was made in November, 2018: this application was granted in December, 2018. GC was active in the review of the terms and conditions of this grant. GC will confer further with Alex Liberovsky regarding compliance with the reporting and accounting requirements stipulated in the terms of this grant.



## OCA Restructuring Consultative Committee Report

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**Participants:** His Grace, Bishop Daniel, Archpriest Alexander Rentel (Chancellor), Archpriest John Dresko, Archpriest Timothy Hojnicky, Lisa Mikhalevsky.

The Restructuring Consultative Committee was constituted in May of 2018 by His Grace, Bishop Daniel, at the blessing of His Beatitude, Metropolitan Tikhon to assist His Beatitude in restructuring the administrative structure of the Chancery offices in Syosset. His Beatitude had earlier appointed Bishop Daniel as Chancery Administrator to assist him in assessing the issues and His Beatitude's concerns for the Chancery offices.

Some early criticisms of this committee were that there was nothing to do as the Metropolitan had already made his decision in terms of the officers of the Chancery. This could not have been farther from the truth! There was much to do, and at times it was a bit daunting. But to be clear: His Beatitude already made his decisions concerning his future plans before this committee came into being.

What the committee was called to do was to help His Beatitude restructure those offices for the new administration given His Beatitude's and His Grace's observations on the strengths and weaknesses of the administration at that time. Taking all this information into consideration, the committee then came up with a plan reflecting His Beatitude's observations and thoughts. This committee is not and was not responsible for hiring or dismissing. It was formed to help the Metropolitan organize and assess what was needed for a more efficient and workable Chancery.

### Meeting Dates:

- Initial Conference Call: *May 3, 2018*
- In Person Meetings: *May 29-30, 2018, Syosset, NY*
- In Person Meetings: *August 21 -22, 2018 Las Vegas, NV*
- Conference Call: *November 6, 2018*
- In Person Meetings: *1/16-17, 2019 Washington, D.C.*

The committee helped organize the structure of the Chancery in Syosset taking into consideration the two other structures that were put in place after 2006. Taking His Beatitude's administrative style and preference, we developed an operational flow chart that was presented to the Metropolitan Council at the Fall Meeting in September 2018.

Once His Beatitude made his selection of Chancellor, and had it blessed by the Holy Synod and endorsed by the Metropolitan Council, the V. Rev. Fr. Alexander Rentel then joined our committee and participated in this process.

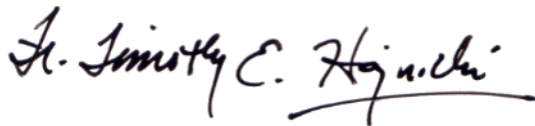
At the end of the last meeting in Washington, D.C. the committee made its final recommendations and edits of the various position and submitted them to His Beatitude. While a Treasurer and Chancery Administrator (Secretary) were not identified at that point, Fr.

Alexander took the recommendations of the committee, and the Metropolitan and he will proceed from there. Again, the committee's competency was not hiring/dismissing, but rather organizing who should do what based on what has and has not worked in the past, the prerogatives of the Metropolitan, and his plans for a more efficient and productive chancery office.

Having thanked the committee for their work, the committee was officially dissolved by His Beatitude, and their work will be referred to the Metropolitan Council and the various committees responsible for these things (HR, etc.).

The committee is satisfied in what we have accomplished, and I have genuinely enjoyed working with each other in this important project. We are grateful to have served and are pleased in where this is headed. We fully support His Beatitude, and our new Chancellor, and we pray that God would continue to bless this process for the betterment of the Chancery in Syosset and building up of our beloved Orthodox Church in America.

Respectfully Submitted,

A handwritten signature in black ink that reads "Fr. Timothy C. Hojnicky". The signature is written in a cursive style with a long horizontal flourish at the end of the name.

Archpriest Timothy Hojnicky, Committee Secretary

Report of the *Department of Christian Education* to the Metropolitan Council  
Orthodox Church in America    January 2019

Members: Mrs. Veronica Bilas, Matushka Myra Kovalak, Matushka Alexandra Safchuk, Mrs. Jewelann Stefanar, Matushka Christine Zebrun, Matushka Valerie Zahirsky (Chair), Mr. John Pusey (Webmaster.)

Projects Ready or in Progress: The sixth in the Department's series of **Activity Books**, entitled *Luminaries*, continues in production. We plan to finish the book and offer it for download by the end of this year.

The **Weekly Bulletin Inserts** that the Department provided for five years are now being put into categories so that teachers can use them as sources of information on a myriad of subjects. Teachers will be able to look up a topic and find several short articles (the bulletin insert texts) on that topic.

A **Newsletter** is ready to be put up on the Department site, detailing several of our more recently-produced resources. As often happens, it is taking longer than we would like to get this item onto the site, because the site is on a private server to which only our volunteer webmaster has full access.

For the Future: The All-American Council gave us an opportunity to hear about the ways our materials are being used. It was very gratifying to learn that parishes in all parts of the country use these resources, often adapting them, with great creativity, to their own local situations. We encouraged all those who talked with at the Council to stay in touch with the Department in future, so that their ideas can be disseminated to others.

The Council also gave us the chance to expand our **Department's Data Base** and this expanded roll of names and addresses will be passed on to the next group of Department members.

Respectfully submitted,  
Matushka Valerie Zahirsky, Chair

## **OCA DEPARTMENT OF CHRISTIAN SERVICE AND HUMANITARIAN AID (CSHA)**

### **Report to the Holy Synod and Metropolitan Council**

**August 1, 2018 – January 31, 2019**

**Chair:** Donna Karabin

**Members:** Priest Timothy Yates, Priest Seth Earl, Arlene Kallaur, Diana Pasca, Susan Schlasta, Nancy VanDyken

**Episcopal Liaison:** His Eminence, Archbishop Melchisedek, Archbishop of Pittsburgh and W. PA

**Ministry Focus:** Parish Ministries, Matthew 25 Charitable Outreach, Senior Life, Family Life

**CSHA on the OCA website:** [Department of Christian Service and Humanitarian Aid](#)

[CSHA Website](#)

In the months since the 19<sup>th</sup> All American Council last July, CSHA members reflected on the event as the major highlight of the last triennium. The AAC provided opportunities in various settings to communicate department programs and to exchange information with hierarchs, clergy and laity from dioceses and parishes. CSHA members once again affirm their commitment to provide valuable ministry resources to the OCA faithful.

His Beatitude Metropolitan Tikhon contacted CSHA in March and July of 2018 with follow up by the past and present Chancellors more recently about the intention to review departmental ministries. CSHA's chair and members are anticipating new leadership and possible restructuring, hoping to contribute constructively towards the revitalization of OCA's Church ministries in 2019.

CSHA's work continues with monthly conference calls focused on the review of current programs, resource development and communications as shown in the highlights that follow. Future events are under serious discussion with research on conference/retreat sites, dates and themes while being considerate of other Orthodox events already scheduled. Implementing plans could be facilitated with additional new CSHA members. It is all tentative at this time pending the outcome of the department restructuring. Administrative tasks include replies to questions and comments that come in by way of OCA referral, email, Facebook and Messenger, and through CSHA's website inquiries. One of the most interesting has been Orthodox adoption interests which the OCA did facilitate in the past.

The Diocesan Ministry Network has been placed on inactive status. It did not prove to be the communication tool we had hoped. The one exception was Diana Pasca from the Diocese of NY/NJ who helped highlight exemplary parish ministry and outreach programs in her area and informed local parishes about CSHA resources.

The close out of CSHA's 2018 finances came in just under budget. Expenditures covered AAC expenses, printing costs, travel reimbursements and the fee for the new website. The annual \$500 donation to Church World Service was made. An unanticipated expense was received for travel costs by the OCA representative to the October Church World Service meeting. Fortunately the costs were modest, promptly approved by Abp. Melchisedek and reimbursed. Discussion followed about a recommendation that these expenses in future years be covered through the Department of External Affairs.

### **PARISH MINISTRY RESOURCES (PMR)**

Two new articles were recently introduced in the [Community Service](#) section of [Parish Ministry Resources](#):

[Compassion in Action](#) by Deacon Michael Schlaack ~ September 2018

This new article describes the step-by-step journey of exploration, spiritual discernment and training taken by the faithful of [Saint Mary Magdalene Church](#) in Fenton, MI (Bulgarian Diocese) in their pursuit of a ministry of personal presence. Deacon Michael reflects on his experience with neighbors and the homeless with the need to

“see them as God’s image-bearers, acknowledging their humanity without judging or trying to ‘fix’ them.” Saint Mary Magdalene Church served as the “Compassion in Action” pilot program.

[Gateway Ministries and the Garment of Salvation: An Interview with Paul Finley](#) by Fr. Jonathan Lincoln  
An informative and inspiring new article was added in December of 2018 highlighting the outreach ministry of Saint Herman House of Hospitality in Cleveland, OH. It is a FOCUS North America site with Mr. Paul Finley serving as Director. As the title reveals, Saint Herman House provides a broad scope of ministries to meet the “gateway” material needs of food, shelter and clothing, as well as the spiritual needs of homeless and troubled men in its inner city community.

Additional new resources are being coordinated by Arlene Kallaur including a series of articles on the Opioid Pandemic. We consider where there are ministry gaps when exploring new topics. Suggestions are welcomed.

The department encourages dioceses and parishes to post and distribute PMR articles. In addition to guiding outreach and ministry, they can be used in discussion groups. We encourage rectors and parish leaders to contact us through [Be a Contributor](#) on the CSHA website about possible submissions from their communities on any of the PMR themes: [Theology of Lay Ministry](#), [Community Service](#), [Parish Development](#), [Witness and Mission](#), [Stewardship Education](#), [Family Life](#), [Youth and College Ministries and Seniors](#).

#### **COMPASSION IN ACTION: Parish Ministry Training (CiA)**

**Director:** Nancy VanDyken

**Task Force:** V. Rev. Dr. Steven Voytovich, Popadija Katherine Vitko, Donna Karabin

**Resource Volunteers:** Rev. Chaplain Sean Levine, Dn. Michael Schlaak, Mat. Jennifer Levine, Susan Schlasta

**Funding:** Designated gifts - V. Rev. John and Popadija Katherine Vitko & Church of the Holy Cross–Medford, NJ

The 19<sup>th</sup> All American Council was an important opportunity to present CiA as a ministry of personal presence and genuine Orthodox Christian care within our parishes and for others in our neighboring area. It was ideal to have in person discussions with interested clergy and laity. Since then, feedback was received from several people involved in CiA in a variety of roles, which has led to reconsideration of the format of building CiA ministry in a parish.

- **Reconsideration of the format of Compassion in Action ministry – activating the parish**  
Much effort has been focused on evaluating the recent feedback. Consideration was given on how to encourage parishes to begin or implement a CiA ministry and experience its benefits, especially while there seem to be legitimate obstacles to parishes committing to CiA, most obviously:
  - a. Human resources – a “critical mass” of volunteers
  - b. Financial commitment (of almost any size)
  - c. The uniqueness or “newness” of this particular ministry development process, and the amount of work/commitment to be done to bring the ministry into being

Therefore, the CiA Task Force met to discuss a redesign of the CiA ministry development for parishes with the goal that parishes will be able to try out, and begin to engage in some visitation type ministry (a ministry of presence) that will mesh with a ministry the parish may already be doing, as well as a simple enhancement of skills for anyone in the parish in the areas of Active Listening, etc.

As a result of discussions, the process of CiA starting in some manner in a parish is being changed. The goal is to offer parishes a way to acquire skills/training and experientially reap some benefits of engaging in this type of Christian caring without a full commitment to a formal long-term program. We believe the ideal is still the CiA development for parishes as originally designed, but that format now finds its place in a three-tier/level system of CiA ministries:

**Level 1:** Some introductory resources/materials to define what a caring, listening ministry of presence is. CSHA/CiA will offer retreats/training seminars to parishes that want to offer it for parishioners, whether or not they are engaged in an outreach/caring type of ministry. There will be a follow-up call to the parish by the retreat leader one month after the retreat.

**Level 2:** Parishes that are more invested or serious about having some type of group of volunteers who are engaged in this kind of ministry will move into Level 2, as they desire (and as they've tasted the good fruits from Level 1). A few more articles/training resources may be offered online in addition to the face-to-face training mentioned above. This training would be tailored to the parish's use of the skills under consideration. At this level, the group that is involved and receives training (or retreat attendance) will also engage in some group reflection about their own caring encounters. Retreat/training topics will introduce the concept of this type of group sharing, with the group experiencing it in practice. There will be a follow-up call to the parish by the retreat leader one month after the retreat.

**Level 3:** If a parish wants to fully develop an on-going CiA ministry (caring, listening, visiting, ministry of presence, mentoring and peer support) with a dedicated formal group of trained volunteers with guidance from CSHA/CiA, the parish will move into Level 3. This level largely corresponds to the original CiA parish ministry development as originally conceived.

- **A completely new on-line Discernment Kit has been created and resourced. These materials are ready for access by coaches and parishes in the discernment process.**
- **Most of the work in the coming months will be to provide a means to offer Level 1 and Level 2 to parishes** (e.g., resources, volunteers/trainers, online access, definition/parameters, retreat design, topics to train onsite and the onsite training materials, etc.).

#### **ORTHODOX LIVING WILL – Advance Directives for Healthcare and Funeral Care**

CSHA continues to promote the two documents offering an Orthodox Christian approach to living wills and end-of-life issues. OCA dioceses and their parishes are encouraged to post them on their websites to make them accessible to clergy and laity of all ages. The wise consideration of personal desires for medical treatment in end-of-life care, funeral and burial preferences is best undertaken before a crisis arises. Access them on the [CSHA Website](#).

#### **CSHA COMMUNICATIONS**

CSHA continues to build an audience for its active Facebook page known as [OCA Parish Ministry](#) as a way to better promote new PMR articles and ministry news. We are growing in numbers of people reached with statistics showing a national, international and ecumenical reach. We are eager to reach more OCA faithful. We invite OCA bishops, clergy and laity to visit our page and share our ministry news with others in their communities.

The new department website was introduced at the 19<sup>th</sup> AAC thanks to the initiative of Fr. Seth Earl. It provides streamlined access to CSHA's resources consolidated in one site. It also has a communication page for questions and suggestions. Visit [CSHA Website](https://www.parishministries.org/) (https://www.parishministries.org/).

**Orthodox Church in America  
Department of Continuing Education**

**February, 2019**

During the Fall of 2018, the Department created and presented a mandatory five-hour course on Suicide Intervention and Prevention.

In 2019, the Department continues to present its course on Suicide Intervention and Prevention, where invited by the local clergy or hierarch.

In 2019, the Department is in the process of creating a five-hour course on Catechesis and Bible Study Training (Train the Trainer), scheduled to begin presentation during the Fall of 2019.

The Department remains unfunded, depending on course fees for revenue.

V Rev Ian G Pac-Urar  
Director

**DEPARTMENT OF EVANGELIZATION**  
**Spring 2019**  
**Archpriest John Parker**

Brief Updates:

1. Just today (January 31) finished a two-day ACNA-OCA dialogue meeting, held at St Vladimir's Seminary, with the Schmemmann Lecture. Present were His Eminence, Abp Melchizedek, Apr Chad Hatfield, and I, along with Bishops Ray Sutton, Kevin Bond-Allen, David Hicks, and Bill Atwood. We had a vigorous discussion concerning our raison d'être. We reiterate (from our OCA side) that we are meeting to discover and overcome the barriers to communion between us. This is a painful process. Abp Melchizedek can bear witness to the tenor and trajectory of our engagement.
2. Presently we have two planting grant parishes. At the End of 2018, we had two graduate the grant (one successfully, one not) and one which went into a state of rapid decomposition and was thus discontinued after a year. We did not have a viable application for a new grant. This is a tragedy, and I wonder if it is a sign of stagnation in our church? Or is it that the grant is not well known? (Monthly essays on the OCA website should be a good demonstration to all that the grant continues.) I wished to meet with all the Chancellors at the annual Chancellors/Treasurers meeting, but this was not possible this round. One strategic way to build a long term, geographic vision is to meet with the chancellors to make a church planting/mission plan, which they could in turn develop and share with local deans. This is the model of the Carolina's Deanery, which has planted, in the last 10 years, many missions including: Wilmington, NC; Greensboro, NC; Beaufort, SC; Rock Hill, SC; and a few others. This work was done by intentionally picking cities/towns where the demographics would support a new church, according to a careful rubric. I ask each Hierarch, please, to remind the missions of the planting grant, and how it supports the growth of local missions and the wider OCA.
3. I continue to serve on the OCMC Board, as one of the OCA representatives. The Board met, as is our custom, in November, in St Augustine.
4. My appointment as Dean of St Tikhon's was an unexpected and gigantic change for me, and has required my nearly undivided attention during the fall, as we sold our home, moved, and I took up my duties. So, since the Summer, I have not be as customarily active in Departmental work as I customarily am.

I understand that the departmental organization is under reconsideration, and so I share the following, an edited version of a letter sent to His Beatitude on the last day



of Great Lent, 2018, when asked concerning the reorganization of the various Departments in the OCA.

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Please allow me to begin with a word of thanks. Thank you for entrusting to me the sacred honor of chairing the Department of Evangelization. I take this responsibility very, very seriously; there is scarcely an hour that passes during which I have not thought about some angle of mission and evangelization that we might take; there is not a person I encounter anywhere for whom I am not thinking: how can I bear witness to this person about Jesus Christ as we know him in the Orthodox Church. Thank you. I am most definitely interested in continuing to serve as Chair. If there must be a changing of the guard, I ask your Beatitude, with the Holy Synod, to fertilize around the base of the Department for at least one more triennium, cf Luke 13:6-9.

I was appointed with the stepping down of Archpriest Marcus Burch, who at that time had been appointed as Chancellor of the Diocese of the South, and was already dean of the Carolina's Deanery. In his words, he just couldn't do it all with any sense of duty and attention—too much pull in too many directions. At that time, the Department's main (only) work was a severely financially handicapped Mission Grant program, and, to my knowledge, no other activity at all. The budget of the Department had been decimated in the wake of our financial unpleasantness. I inherited a few computer files, the names and contacts of the Planting Grant missions, a list of "members" or "consultants" of the Department (at least one of which, as I recall, had been laicized!) and a hearty, "go for it!"

From this, I have tried to make sense of what "was" (very little) and what "could be" (almost endless). In all frankness, there was, and there has been very little, if any, external direction as to the direction of the Department. Most of that direction has the bridling, for good or ill, various brain-storms.

At the beginning, I saw the department as having, perhaps, three foci: Internal Mission (the Evangelization of the sacramentalized), external mission (the planting grants, and building bridges to Orthodoxy through connections in the heterodox world), and revitalization (Living Lazarus-like in our dying and dwindling dioceses and parishes). I also saw the need to visit each diocese and to learn from each bishop what the needs were/are in their various parishes. I have not visited Canada, and I have had little experience with the Mid-west; I have had minimal interaction with Alaska, but with the other dioceses, I have had good contact and interaction. It has taken years for this, as a stipendiary chair, who is instructed, "do what you can, but don't be gone too long"—especially since there is other ongoing growth that needs to be tended, and all kinds branches to the world of evangelism.

I am gradually building a network of Planting Grant priests who mentor the new ones. This seems to be working well, but it is still very fledgling. One observation I

will make about the missions is this: while there is some amazing work going on in various missions, I notice a diminishing strength and a slower growth than I expected, largely, I think, due to missions springing up in medium-large size towns, as opposed to small or larger cities.

I would say that my work in the Department, despite my (self-perceived) gifts and talents, tends to be more responsive than visionary or deliberate. Like throwing spaghetti on the wall, to find out what sticks. It would be better, for a season, to take these 5 or 6 years worth of observations, and make a plan based on them.

Under the current arrangement, if there were going to be a new chair assigned, I think I would be better just to ask someone to watch over the planting grant. I do not recommend this route, but if status quo is the goal, it is better simply to disband the Department.

I do feel, rather, that there is boundless work that we could do and be doing, that we could plan and implement, with a serious, focused, unashamed effort. Given the religious landscape in North America, I think it would behoove us to revisit all of our interfaith work, and refocus our efforts at evangelizing especially with respect to the NCCC groups, and other groups such as the ACNA. Landscapes in 2019 are very, very different than they were even ten years ago, not to mention twenty and thirty years ago, but we have not made any bold steps towards evangelizing any such groups, who are basically abandoning even a remnant of “Basic Christianity”.

I would love, and would be honored, to continue for another season as Chair. In many ways, though it has been a number of years, much effort and energy is consumed simply in surveying the land carefully—and as a Department Chair, this work is far less than part time. At a minimum, if re-appointed, I would like to see the next round of three years or so be a time of strategically planning and organizing, and building up upon the “research” that I have been able to do intentionally or unintentionally in this recent season.

None of this, so far, has touched on anything like “external” evangelism. I have begun to make some contacts where serious inroads might be made with some effort. It should not be the case that an occasional meeting with Rick Warren or those I have met at his church or through his invitations, should end up in the “nice religious meeting” experience for me. “Met some great folks, full stop.” It is critical to be able to devote time and energy to follow-up and to visit these pastors of significant influence, and to see if they are willing for us to share the Orthodox Faith with them. I have been asked by one mega-church pastor in Atlanta to come and speak to his people about the Resurrection; we are currently working on a date for this.

There are many creative ways to do creative ministry that seeks to reach those who are looking for what treasure we have, but do not know its name or where to look. Including the possibility for the current year to use a sizable amount of money

(more than \$65,000 not being used for planting grants this year, not including any money from the Evangelism bequest), which could help drive and support such planning and vision.

Regardless, I reiterate my thanks for this honor, and my commitment to my best efforts for the good of our Church, in the honoring of our Lord's Great Commission, issued forth from the tomb on Holy Saturday.

In hearing those words once again from Isaiah 6, "who will go for us; whom shall we send?" I reply, humbly, with the Prophet, "Here I am! Send me!"

**Orthodox Church in America**  
**Department of Liturgical Music and Translations**  
**Report to the Holy Synod and the Metropolitan Council – Spring 2019**

**A. Music Downloads**

A major goal of the Department of Liturgical Music and Translations is to provide the necessary musical resources for a parish choir in order to be able to chant the responses to all the liturgical services that are called for in the Typikon and celebrated in the local church. These musical resources are posted on the website of the Orthodox Church in America and made available as a free download. As of January 31, 2019, approximately 7,200 pages of sheet music have been posted on the website and are currently available for free download.

The Troparia and Kontakia Project, begun in 2002, has been completed as all 366 days of the calendar year have been provided with musical settings of the appointed Troparia and Kontakia. Over 2,400 individual settings of troparia and kontakia representing a variety of chant settings (Russian Common Chant/Bakhmetev-Lvov Obikhod, Kievan, Greek (Russo), Galician, Carpatho-Russian, Serbian, Byzantine, and Bulgarian), using the “*You, Your*” form of pronoun to reference the Divinity, are posted on the website and available for free downloading. As reported to the 19<sup>th</sup> AAC, the Department of Liturgical Music section of the OCA website is averaging approximately 30,000 “unique hits” per month (31,453 unique hits in January, 2019.)

As of February 1, 2018, we have begun to add to this collection troparia and kontakia in the Obikhod musical setting (Common Chant) using the pronouns *Thou, Thy* to reference the Divinity. Last year all troparia and kontakia for the major feast days and for the saints that were commemorated on the Sundays in 2018 have been adapted (using *Thy* and *Thou*) by Matushka Beth Johnson and are available on our website. This project continues in 2019.

Following the All-American Council of 2018, we began to scan and make available on our website the music for the feast of the Nativity of Christ that was published in booklet form by the Department in 1987.

**B. Texts for Liturgical Services**

190 liturgical services, available in either TT (Thee/Thou) or YY (You/Your) form, containing the so-called *Propers* of Vespers and the Divine Liturgy, pointed to be sung according to the Common Chant, were posted on the website in 2018. Approximately the same number will be posted in 2019. These include services for all feasts and saints that call for a Vigil in the “official” Liturgical Calendar, in addition to the services of the Presanctified Liturgy during Lent and the services of Holy Week. The services are put together by the Chairman, rubric outlines are provided by Archimandrite Juvenaly and the texts are proofread by Dr. Vladimir Morosan. Dr Vladimir Morosan is charged with the responsibility of adapting the texts, using the “Thee-Thou” format.

As the postings are in Microsoft Word, the texts can be downloaded and then easily adapted for local and particular use. These texts are not only being used by choir directors and singers, but

many parishes are making them available for non-singers so that worshippers who do not sing in the choir can easily follow the texts as they are being chanted during the services.

### **C. On-line Course in Choral Conducting**

For the seventh consecutive year the on-line course for Beginning Choir Directors was offered by the Department to interested and beginning choir directors. Beginning the second week in September, 2018, the course consisted of 12 (twelve) weekly sessions, with each session consisting of both video and textual teaching demonstrations to go along with daily exercises and weekly assignments. Each student meets weekly on-line via the *skype videosystem* with the teacher of the course, Prof David Drillock, who then provides written evaluations to each participant.

In the seven years (2012 through 2018) that the Department has offered this course, 110 students have been registered for the course, of which 91 (83%) have successfully completed it. In the fall of 2018, 20 students registered for the class – 18 completed all 12 sessions, 1 completed 10 sessions, and 1 had to withdraw after 2 sessions because of a serious illness.

54 participants of the conducting class are now serving as choir directors or assistant choir directors in parishes of the Orthodox Church in America: in the archdioceses of Canada and Washington, D. C, and the Albanian Archdiocese, and the dioceses of Eastern Pennsylvania, Midwest, New England, New York and New Jersey, the South, and the West. 5 students are directing choirs in the Antiochian Archdiocese, 4 in the Russian Orthodox Church Outside Russia, 3 in the Greek Archdiocese, 3 in the American Carpatho-Russian Diocese, 3 in the Serbian Orthodox Church, 1 in the Russian Orthodox Church in England, and 1 in the formerly OCA Church (now Greek Archdiocese) in South Africa.

The course consists of 12 sessions; each session includes both video and textual teaching demonstrations. The first part of the course places special emphasis on the relationship between text and music, accented and non-accented syllables; exercises are focused on learning the beat patterns. The second half of the course concentrates on techniques of conducting chant, singing in phrases, analyzing specific examples of both metered and unmetered music, and preparing the music for conducting. Music examples accompanying each lesson were sung by choir members of St Paul Orthodox Church, Dayton, Ohio. Video recording for the sessions was done by Dr Mark Pearson, former Instructional Technologist and Designer at Earlham College. Dr Pearson designed the online course format and provided technical support and program assistance.

Respectively submitted,

*David Drillock, Chairperson*  
Department of Liturgical Music and Translations  
Orthodox Church in America  
February 3, 2019

Report of the Department of Youth and Young Adults  
Spring 2019 Metropolitan Council Meeting  
Fr. Christopher Rowe, Acting Chair

- Dn. Alexander Cadman, the OCA's representative on the OCF Board of Directors, has been elected to serve as the chairman of that board for 2019
- Fr. John Bacon, our liaison to Youth Scouting in America, has submitted his resignation. Fr. John has faithfully and effectively served the Orthodox Church in this capacity since 1997. He has been a valuable resource to many over these decades and we certainly appreciate his service. We are beginning the process of identifying a replacement.
- There is still the outstanding question on the money raised at the 19<sup>th</sup> All American Council and the Youth Director position.

# Spring 2019 Report

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## [Office of Institutional Chaplaincy]

### 1. OFFICE MANDATE

The Office of Institutional Chaplaincies supports the ministry of full and part-time hospital, hospice, long-term care, prison, fire, police chaplains, and those in other settings.

The Orthodox Church in America is a member of the Commission for Ministry in Specialized Settings (COMISS Network), the Association of Religious Endorsing Bodies (AREB), and endorses chaplains to serve in specific institutional settings and toward certification with the Association of Professional Chaplains (APC), the Association for Clinical Pastoral Education (ACPE), and the College of Pastoral Supervision and Psychotherapy (CPSP).

Archpriest Steven Voytovich serves as the Office's Director, supporting the formal endorsement process for institutional chaplains and facilitating dialogue among those ministering in a variety of institutional settings.

### 2. OFFICE MEMBERS & RESOURCE PEOPLE

**Chair:** V. Rev. Dr. Steven Voytovich  
**Members:** Frs. Paul Fetsko, Michael Medis, Timothy Hasencz; Joseph McCartney; Anna Nikitina, Brett McKey, Jessica D'Angio, Larisa Waya

**Resource People:** V. Rev. Theodore Boback  
V. Rev. Sergei Bouteneff

Website: [www.orthinc.org](http://www.orthinc.org)

### 3. BUDGET REVIEW

- 2018 Budget: \$6,000 stipend, \$2,125 expenses; Expenditures: \$6,000 stipend, \$1,546.78, expenses.

### 4. HIGHLIGHTS AND PROJECTED FUTURE INITIATIVES

- Transitions: we ask for continued prayers for Fr. John Maxwell who continues to battle cancer. We have new endorsed and in some cases certified chaplains: Fr. Joseph McCartney, Chaplain Brett McKey, and Reader Abraham Labrada whose commissioning and endorsement remain in process. Abraham would be the first commissioned and certified chaplain from the Diocese of Mexico!
- Our Facebook page has been growing in interest and is now included on the OCA's website front page. We are grateful for this visibility!
- Have met briefly with several of our chaplains while traveling for other purposes.
- Several chaplains met at the November OCAMPR meeting in Boston.
- A new credentialing body has been created, Spiritual Care Association (SCA) by The Healthcare Chaplaincy in New York. This body appears to be competing with current credentialing bodies with an eye toward further solidifying engagement in the medical treatment model, and does not require endorsement.
- Fr. Steven attended annual endorser meetings in Alexandria, VA (January 2019: COMISS and AREB).

#### Future Developments:

- We will continue to post opportunities for exchange on our [www.orthinc.org](http://www.orthinc.org) website during the year.
- With the advent of now two jurisdictions having similar endorsement processes, we need to continue dialogue toward implementation of uniform approach to institutional chaplaincy endorsement.
- Compassion-in-Action (CiA) implementation is currently underway, and this office continues to support its implementation.

- Support the Strategic Plan:
  - Our chaplains are assisting with clergy continuing education; seminarian training. Fr. Steven began a dialogue with Fr. Ian, now in charge of continuing education about the ongoing continuing education chaplains are already undertaking (at least 50 hours each year). We hope to come to some kind of understanding so that clergy chaplains are not having to duplicate continuing education in chaplaincy and church settings.
  - Continue to represent our OCA in the greater pastoral care and counseling arena
- Hopefully opportunities will arise to continue the dialogue begun two years ago with our Orthodox Campus Fellowships (OCF) to support their chaplains.

## 5. COMMENTS

The Spiritual Care Association (SCA) is a body that has established itself for the purpose of credentialing chaplains. Their explicit goal is to utilize political influence to have chaplaincy recognized in medicare procedure payments that are moving to a “bundled” approach. Currently no reimbursement is attached to pastoral care. As such they are highly “data” driven. In meeting with Eric Hall, their leader, during our AREB meeting, however, it is also clear that they do not require theological education or faith tradition affiliation (related through endorsement). The gathered endorsers have now recognized that without some significant change, SCA will not likely develop partnerships with faith tradition endorsers, and other credentialing bodies are considering following a similar path.

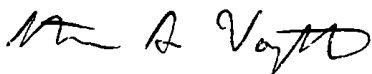
Given this development, it should probably be indicated that OCA chaplains are not encouraged at present to seek credentialing with this body, especially if they are presently endorsed for ministry for current positions and other credentialing bodies. It is the concern of endorsers that legal issues may arise for this group, the liability for which is likely real and a threat to all parties connected to it.

I am currently serving on the COMISS leadership team as member at large. This year’s forum was focused on ROI. Business minded people know this as return on investment, but in the chaplaincy arena it represents ways of measuring tangible and intangible contributions by pastoral caregivers that are meaningful for the institutions in which they serve. Several examples were given that offered much food for thought.

It is also important to note, briefly, that a unit of Clinical Pastoral Education was completed at St. Tikhon’s Seminary from January through August of 2018. The participants in this unit included a military chaplain, and seven current students. As the certified educator for the unit, it was incredible to see the students make a most significant connection between what they were receiving in the classroom and through participation in services, and what occurred “at the bedside”, and back again!

In closing, I once again ask for your prayers on behalf of the men and women serving as chaplains in our institutional settings, bearing witness to the light of Christ to many who are hungry, sick, incarcerated, and in danger.

Respectfully submitted,



The V. Rev. Dr. Steven Voytovich, Director  
Office of Institutional Chaplaincies



**Office of Orthodox Church in America Military and Veterans Affairs Medical Center  
Chaplaincies Spring Report 2019**

Very Rev. Theodore Boback, Jr. –  
Dean/Executive Director OCA Military and VA Chaplaincy  
Very Reverend Joseph Gallick -  
Assistant Dean/Deputy Director OCA Military and VA Chaplaincy

His Beatitude, Metropolitan TIKHON serves as the Ecclesiastical Endorser for the US Military and Veterans Affairs Medical Center Chaplaincies; His Grace, Bishop Daniel serves as the Episcopal Liaison, His Eminence, Archbishop Nikon serves as the liaison to the Assembly of Canonical Bishops.

**Vision**

The Orthodox Military Chaplain is an Orthodox Priest in uniform serving in the Armed Forces of the United States of America. The Veterans Affairs Medical Center Chaplain serves in the Department of Veterans Affairs in a medical center. They are active members of the respective chaplaincy and share a common core of professional responsibilities for worship services, personal counseling, administrative duties, pastoral visitations, cultural activities, humanitarian projects, moral leadership, and appropriate collateral duty assignments.

They in addition to fulfilling the disciplines, dogmas, doctrines of faith and other canonical directives required of all Orthodox Priests, comply with the administrative requirements of their Ecclesiastical Endorsing Agency.

They exercise their priestly mission in three ways: to those of the Orthodox Faith, to those of other faiths, and to those who have no religious affiliation.

**Mission**

The mission of the OCA's military chaplain is the propagation of the Orthodox Faith; to serve, worship, and love our Lord and Savior Jesus Christ; and to bring spiritual nourishment and enlightenment to thousands of Orthodox military personnel and their families serving their country throughout the world.

The mission of the Veterans Affairs (VA) Chaplains is to counsel and to bring spiritual nourishment through the Holy Sacraments to hundreds of Orthodox veterans in VA Medical Centers throughout the United States of America.

**Operation:**

The Executive Director and Dean of Chaplains is the chief administrator for the Metropolitan in all matters concerning the OCA chaplains in the Air Force, Army, Navy, Marines, Coast Guard and the Veterans Administration. The Executive Director/Dean is

the representative of the Metropolitan to the National Conference of Ministry to the Armed Forces (NCMAF) and the Endorsers Conference for Veterans Affairs Chaplaincy (ECVAC). The Assistant Executive Director works together with the Executive Director. The Executive Director/Dean and the Assistant Executive Director recruit and screen candidates for the chaplaincy, prepare ecclesiastical endorsement for the Metropolitan and maintain contact with all Orthodox chaplains and with the Executive Director of the Armed Services Chaplains Board, Military Chief of Chaplains and the VA National Staff Chaplain and chaplain staff. They do this through telecommunications, email, correspondence, and by participating in various meetings and site visitations throughout the world. The Executive Director/Dean provides guidance to chaplains serving throughout the world on spiritual matters and ensures that Orthodox personnel, regardless of where they are stationed can freely exercise their religious beliefs. The Executive Director/Dean attends all conferences and executive board committee meetings of the NCMAF and ECVAC. They work in coordination with the Episcopal liaison Bishop Daniel and with Archbishop Nikon who serves as liaison to the Assembly of Canonical Orthodox Bishops.

The Military chaplains from the Orthodox Church in America serve in the United States Armed Forces in the United States, Germany, Korea, Japan, and the Middle East. The Veterans Affairs Medical Center Chaplains serve within the United States at VA Hospitals.

#### **Endorser's Conferences:**

The annual National Conference on Ministry to the Armed Forces (NCMAF), the Endorsers Conference for Veterans Affairs Chaplaincy (ECVAC) and the Armed Forces Chaplains Board with the three branches Chief of Chaplains is conducted in January annually.

Highlights of the recent NCMAF and ECVAC and Chief of Chaplains conferences are next in the report: Meeting was held January;13 through January 16, 2019. The theme of the Conference was: **EXCELLENCE IN LEADERSHIP FOR RELIGIOUS LIBERTY ADVOCACY.** Sunday the NCMAF Executive Committee conducted a Board Meeting. Monday included: a session on an update by the National VA Chaplain Center, Chief of Chaplains update by Chaplain Keith Ethridge, a presentation by Ms Lisa Pape, Deputy Chief of Patient Care Services Officer for Care Management and Social Work; and 21<sup>st</sup> Century Chaplaincy by Chaplain Lowell Kronick, Associate Director at the National VA Chaplain Center. This was followed by an ECVAC Business Meeting. Fr. Ted was elected to serve on the ECVAC committee as an at large delegate. An evening reception was held at which time new and departing endorsers were honored.

Tuesday Session began with a devotional by Bishop Carl Wright Armed Forces and Federal Ministries of the Episcopal Church. The session included presentations on: Chaplaincy Innovation Lab by Trace Haythorn Executive Director/CEO ACPE; The Endorser as Coach, Val Hastings, Founder and President of coaching4clergy; Emotional Intelligence: Exploring the Fundamental Science and Art of Transformational Leadership and Organization Resilience, Dr. Sarah Spradlin, Founder and CEO Viturian Advantage;

Artemis Joukowsky a filmmaker and grandson of Waitsill and Martha Sharp spoke to the film: "Defying the Nazis: The Sharp War"; Intentional Leadership – Why understanding ourselves and others matters by William Hood, CEO, Eunoia; Chaplaincy in the FBI by Dr. Dan Tyler, FBI Chaplain;

Wednesday began with a devotion/meditation by Archpriest Theodore Boback; The sessions included: Non-Traditional Partners Supporting our veterans' caregivers – a role for NCMAF by Daniel Look, and the Very Rev. Wollom A. Jensen, DA, Capt., Chc., U.S. Navy (Retired) and Religious Liberty Update by Daniel Blomberg, Counsel, Breckett Fund and a Religious Liberty and Free Exercise Panel comprised of Michael Berry, First Liberty Institute Daniel Bloomberg, Beckett Fund Jennifer Hawks, Baptist Joint Committee and Nat Lewin, Lewin and Lewin. Three difference workshops were held: Self Awareness, Empathy and Leading with Purpose, William Hodd; integrating Coaching into your ministry setting, Val Hastings, Founder and President of Coaching4Clergy; and Chaplains: Catalysts for Suicide Safer Communities, Dr. Glen Bloomstrom, Military Director, Living Works Education. Updates on Emerging Issues from the Armed Forces Chaplains Board Chaplain (COL) USA AFCB Executive Director; and Military Recruiter updates. The day ended with the NCMAF Business Meeting of which Fr. Ted serves as an elected at large member of the Executive Committee.

Thursday Sessions were conducted at Pentagon Conference Center. Welcoming remarks by Chaplain (COL) Jay Johns; AFCB Executive Director. A Devotion was given by CDR Bill Riley CHC, USN, Deputy to the AFCB. Mr. Lernes Hebert performing the duties of the Deputy Assistant Secretary, Defense for Military Personnel Policy provided an opening address. Presentations were made by the three Chiefs of Chaplains, Ch (Major General) Steven Schaick, USAF; CH (MG) Paul Hurley, USA; and RADM Brent Scott, CHC, USN. A presentation by Ms Nina Wagner, OSD Policy speaking on "The Security Environment of 2029 – What your chaplains can expect to encounter." And Final Comments from Chaplain Johns concluded the afternoon sessions.

**Other Conferences:** Fr Ted also attended and participated in the Military Chaplain Association Meeting and the Veterans Affairs Medical Center conference.

### **Military Chaplains:**

Orthodox Military Chaplains perform a full cycle of liturgical services including Vespers, Matins, Divine Liturgy, Feast Days, and services during Advent, Great Lent, the Dormition and Apostles Fasts, Liturgy of Pre-Sanctified Gifts and administering the Sacraments of the Church.

Our Orthodox Priests have been deployed in support of the Global War on Terror. Our priests provided worship Services during holy Week and Pascha in tandem with other Orthodox Chaplains from other branches of the services. Others have served with coalition forces for example from Estonia, Georgia, and Romania and others have mentored and have served with the first Orthodox Chaplain in the Canadian Forces since

WWII. Others have advised on various issues and concerns such as those who served with the Coast Guard in Alaska where they advised on coastal Alaskan communities which are indigenously Orthodox.

Included among the continued Ministry Concern of our chaplain are:

Spiritual Renewal, Ministry of Presence, Readiness, Interfaith and Ecumenical Ministries Programs, outreach programs, service on various boards such as family action; biomedical ethics, advisory councils.

#### Military and VA Chaplain Personnel Strength

Personnel Statistics have changed through the years and continues to change based on requirements of the United States Armed Forces and the Veterans Affairs Medical Centers in fulfilling its missions.

#### **Military Personnel Strength.**

**ACCESSIONED:** Fr. Timothy Yates was accessioned by the Air Force Chaplaincy. Fr. Matthew Fuhrman who was is in the United States Army Chaplain Candidate was accessioned into the US Army Reserve.

**PAPERWORK:** has been submitted for one OCA priest to go before the accessioning board in the US Army Active Duty. He should be considered at the April Board Meeting. Three other Priests are applying for Reserve Duty one in the Navy; one in the Army and one in the Air Force.

**PROMOTIONS:** Congratulations to Chaplain Peter Dubinin USAR who was promoted to the rank of Colonel and to Chaplain Stephen Duesenberry, USN who was promoted to the rank of CAPTAIN. May God grant each of them and their families His Many Blessings and MANY YEARS!

#### **Active Duty**

##### **United States Air Force**

Father Eugene Lahue, Chaplain, Lieutenant Colonel, USAF  
Father Thaddeus Werner Chaplain Captain USAF – Joint Base Elmendorf Alaska  
Father Timothy Yates, Chaplain, Captain, USAF - Joint Base Lackland, San Antonio, TX

##### **United States Army**

Father. George Hill, Chaplain (MAJ) USA Fort Hood, Texas  
Father Sean Levine, Chaplain (CPT), USA Fort Belvoir, VA  
Father George Oanca, Chaplain (CPT) USA Fort Leonard Wood, MO

##### **United States Navy**

Father Stephen Duesenberry CAPT CHC USN Camp Lejeune, NC

## **Reserve Component**

### **United States Air Force**

Father Gregory Bruner, Chaplain, Captain, INANG

Father Oliver Herbel Chaplain, Captain, USAFR

### **United States Army**

Father Peter Dubinin, Chaplain (COL) USAR

Father Matthew Fuhrman, Chaplain (CPT) USAR

Father Danut Palanceau Chaplain (CPT) USAR

Father James Parnell, Chaplain (CPT) CTARNG

Father James Sizemore Chaplain (MAJ) OHARNG

### **United State Navy**

Father Herman Kincaid LT, CHC, USNR

### **Retired Military Chaplains**

There are over 30 retired Orthodox Priests from the United States Armed Forces with over of them serving within the OCA in various ministries. The retired chaplains have a range of special skills and are an additional asset within our Orthodox Church. Please read the Continuing Education Report within the Strategic Plan as well as the paragraphs above for more information.

### **Veterans Affairs Medical Center Chaplains**

Father Joseph Martin, VAMC, Wilkes-Barre, PA had fallen asleep in the Lord this past year. **MEMORY ETERNAL!** May God grant him rest in His eternal Kingdom where there is life everlasting. And, grant His Grace, Comfort and Peace to Matushka Glooria and family.

Father Sergei C. Bouteneff VAMC Newington, CT retired this past year.

Father Daniel Degyansky – retired from the Manhattan VAMC

Father Westerberg retired from the VAMC.

May our Lord grant them His many Choicest Blessings to them and family

**MANY YEARS!**

Father Philip Reese serves as a full time position at the Miami VAMC recently. We are grateful for their continued ministry.

VA Chaplains might attend training that equips them to perform specific tasks and or to fill certain positions such as Post Traumatic Stress, palliative care, substance abuse; etc.

### **There are five OCA Priests who serve our VAMCs**

Father Igor Burdikoff – Albany, NY  
Father James Parnell – New Haven, CT  
Father Philip Reese, Miami, FL  
Father Paul Suda – Pittsburgh, PA  
Father George York, Pittsburgh, PA

## **ENDORISING CONFERENCES**

The Orthodox Church in America continues to be an active member and participant in the National Conference of Ministry to the Armed Forces (NCMAF) and the Endorser Conference for Veterans Affairs Chaplaincy (ECVAC).

The Orthodox Church in America is recognized by each of these organizations and the Military Chief of Chaplains and the VA National Chaplain Center as the endorser for OCA priests. To be considered for the military or Veterans Affairs Medical Center (VAMC) chaplaincy, a candidate must first have his Diocesan Bishop's Blessing, then an ecclesiastical endorsement from the Metropolitan, which is prepared by the Dean/Director of the OCA Chaplaincies as well as the candidate must meet the requirements of the United States Armed Forces or the Veterans Affairs Medical Center National Chaplain Office.

We thank Metropolitan Tikhon and to the Holy Synod of Bishops for their support of the Military and VAMC Chaplaincies Program and for identifying priests to serve in the military and VAMC Chaplaincies; to Archbishop Nikon in his communications with us as he serves as the Episcopal Liaison to the Assembly of the Canonical Bishops; to Bishop Daniel for his communication with our office and for his pastoral visitations and to the OCA Chancery in support of the office of the military and VA Chaplaincies.

We pray that God grant His Choice Blessings to Fr John Jillions on his transition and to our new Chancellor Fr. Alexander Rentel and families. Also we thank Fr. John Matusiak for posting the TOC Articles; to Matushka Jessica Fuhrman and Barry Migyanko for their assistance; to Melanie Ringa for her assistance in response to financial requirements and to Fr. Eric Tosi especially for his assistance with the Military Chaplain Cross and thanks to Archdeacon Joseph Matusiak.

We ask that you remember in prayers our military chaplains and families as the chaplains provide the ministry within their area of operations and to our VA Chaplains as they minister to our veterans.

**Fellowship of Orthodox Christians in America (FOCA)**  
**Report to the Metropolitan Council**  
**February 2019**  
**Respectfully Submitted by President Allison Steffaro**

**EXECUTIVE BOARD**

Spiritual Advisor - V. Rev. Theodore Boback

President - Allison Steffaro

Vice President - Todd Walker

Recording Secretary – Mat. Danielle Ilchuck

Treasurer - Michael Bowan

Immediate Past President - Marge Kovach

**OUTREACH**

*Gifts of Love:*

*2019 campaign* –will raise funds to aid the St. Tabitha’s House Orphanage in Kenya, Africa. In addition to chapter appeals, the FOCA is sponsoring a Mediterranean cruise in October and the proceeds will go toward the 2019 Gifts of Love campaign.

*Seminarian Assistance Programs:*

*Adopt a Seminarian program* - several chapters and parishes are providing financial assistance to married seminary students in need during this academic year.

*St. Nicholas Wish List project* – Over 35 families at both STOTS and SVOTS received gifts for St. Nicholas Day. Families at SHOTS received gift cards which is more practical than shipping packages to Alaska.

Several members of our Executive Board visited both STOTS and give a brief presentation on the FOCA’s history and philanthropic activities with the goal of familiarizing these future leaders of our churches with the FOCA, and its goals and mission; St. Tikhon’s has an active chapter that was re-established in 2015.

**NATIONAL CONVENTIONS**

*2018* - The FOCA hosted its 92<sup>nd</sup> National Convention in conjunction with the OCA’s 19<sup>th</sup> AAC at the same venue in St. Louis, MO from July 20-23. We are thankful that the FOCA’s spiritual leader, His Beatitude, Metropolitan Tikhon, His Eminence Archbishop Michael, His Grace Bishop Paul and His Grace Bishop David were able to attend our sessions. In particular, we are grateful for the speech given by His Beatitude in support of the goods works of the Fellowship of Orthodox Christians in America. The convention weekend events included business session as well as a number of opportunities for fun and fellowship such as the President’s golf outing and a “Night Under the Stars” dinner and show at the St. Louis Planetarium. We were blessed to have so many hierarchy and clergy join us on Sunday night at our banquet. A youth program included religious education sessions, trips to local attractions, and a service project which involved the assembly of back-to-school bags. Highlights from the weekend included Father Vasily Fisher of St. James Church, Napaskiak, AK, who pledge to start a chapter in their parish and the presentation of a \$19,000 check to the IOCC for hurricane relief funds from our 2018 Gifts of Love campaign.

*2019*- The Ohio District will host our 93<sup>rd</sup> annual convention in Columbus, Ohio, Labor Day weekend, August 30<sup>th</sup> - September 2<sup>nd</sup>. We invite all of you to join us in a weekend of faith and fellowship.

## **JUNIORS**

Rebecca Kozak continues to do a wonderful job leading the FOCA Junior Department as well as coordinating our efforts with the OCA's Department of Youth and Young Adults.

### *Celebration of Faith Contest:*

The creative arts contest is open to ALL youth who are communicants in a parish or mission of a canonical Orthodox Church in North America. Participants are encouraged to express themselves by submitting projects within the categories of Literature, Musical Composition, Photography, or Visual Arts.

The 2019 topic is: "What Does Jesus See When He Looks At Me?" The deadline to enter is July 22, 2019 and further information is available on our website: [www.orthodoxfellowship.org](http://www.orthodoxfellowship.org)

### *Junior Olympics:*

Each July we bring Orthodox youth together for Junior Olympics, our annual sports camping week, at St. Vladimir's Camp and Retreat Center in Ohio. Record numbers of campers from several states continue to register for the week under the direction of Dn. Daniel and Mat. Catrina Kovalak. This is an excellent opportunity for youth to get away from daily routines and to grow spiritually while living within this Orthodox community. As campers have said, camp is a place where they feel comfortable being themselves; a place where they don't need to pretend to be someone else.

## **UPCOMING EVENTS:**

National Basketball Tournament	May 3-5, 2019	Campbell, Ohio
National Bowling Tournament	TBD	Baltimore, Maryland
Junior Olympics Summer Camp	July 7-13, 2019	Farmdale, Ohio
National Golf Tournament	TBD	Cannonsburg, PA
93rd <sup>st</sup> National Convention	August 30-September 2 <sup>nd</sup>	Columbus, Ohio

Thank you for the opportunity to share this update on the Fellowship of Orthodox Christians in America with you. We are grateful for your support and humbly ask you to keep the FOCA, its members, and our good works in your prayers.

Respectfully Submitted,

*Allison Steffaro*

Allison Steffaro  
FOCA President