



**MEMBERS OF ONE  
ANOTHER IN CHRIST**



15th All-American Council of the  
Orthodox Church in America  
November 10-13, 2008  
Pittsburgh, PA

## **REPORTS OF THE OFFICERS**

*Bring this handbook to the AAC and place  
it in the notebook provided at registration*



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This report has been prepared to introduce the officers of the Orthodox Church in America for the Fifteenth All-American Council to be held in Pittsburgh, PA from November 10-13, 2008.

Contained in the reports are overviews by the Chancellor, Secretary, Treasurer and Director of Ministries and Communications. It also includes the financial report of the Treasurer made in conjunction with the Metropolitan Council. The full financial report of the Treasurer can be found in the Financial Report book. All of these reports should be read beforehand. Each officer will present a short oral report at the Council to be followed by a questions/comments from the floor. The financial reports will be more detailed and given during a dedicated plenary session. The Departments, Commissions, Offices and Boards' reports are contained in separate report in this packet.

Thank you for your participation in this year's Council, and may the blessings of the All-Holy Trinity be with you during your time in Pittsburgh!

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# Introduction

The last triennium has seen some historic changes within the Church. When the Church gathered in Toronto, very few had any clue as to the extent of the problems of the Church. As time progressed and more was revealed, a sense of betrayal and sadness emerged. It was only after a concerted and joint effort by the Holy Synod and Metropolitan Council that the full extent of the problems became known. And these were not dealt with in the timely manner that should be expected from any organization. However, as the problems were found, solutions were also put forward. This, combined with the recent Town Hall meetings and the release of the Special Investigation Committee Report, allowed for a healthy Church organization to be put in place. Some of these changes could be seen as traumatic and some were seen as not going far enough. Nonetheless, the Church began to re-emerge from the past events. It is a process that is only now beginning to have an effect. We would be foolish to think that it can all be solved immediately, but rather we should all look to see progress over the next few years. One very clear element is that it will take years for trust to be restored and the Church to be on the right footing. The Church is dedicating herself to restoring that trust and proper management of the Central Church Administration.

Part of the changes was a reorganization of the Chancery staff and job descriptions. The Holy Synod of Bishops and the Metropolitan Council appointed a Reorganization Task Force whose focus was to examine the operations and positions necessary for an efficient operation of the Central Church Administration. As such, the Task Force worked tirelessly to review each position at the Chancery, the relationship with the necessary operations of the Church and the accountability of these positions and work to the Church as a whole. Therefore, the work force was reduced from twenty-nine paid employees to eleven. Each of these employees has a clear job description, salary structure and accountability. The four officer positions were also redesignated with clear areas of responsibility and accountability. New people were brought into many of the positions that reflected the diversity of the Orthodox Church in America. This all had to be done without interrupting operational efficiency. As of the end of summer 2008, all immediate positions were in place.

In conjunction with this, there was a complete audit and reorganization of the Central Church finances and operations that resulted in the problems of the previous years. This has not been an easy task for the finance team and it is far from complete. It had to untangle webs of complicated and incomplete financial structures. It is far from complete but the last year has been nothing short of a miracle to get the Church to a point of solvency, accountability and transparency. There is still much more work to be done but each step brings the Church closer to the goal of proper accounting.

Please review these reports of the officers. They are a beginning point for many more changes that will come in the future. The offices of the Chancery are open for anyone and everyone to come and see. The Chancery exists for one reason, to support the work of the Church and promote the unity of the Orthodox Church in America.

# OCA Organizational Task Force: After-Action Report

## Executive Summary

Completing its two-year Charter, the OCA Organizational Task Force hereby summarizes seven recommendations for areas of emphasis by the Church as it engages in further strategic planning. The Task Force comprised 6 members and two advisors. They met twenty-two times and produced a work product unique to the OCA: a comprehensive report on operations and a streamlined Chancery organizational structure that increased efficiency and reduced operating costs by more than \$500,000 per year.

The Holy Synod (HS) and Metropolitan Council (MC) reviewed Task Force recommendations in detail and approved them. A member of the Task Force served as Transition Officer in their implementation. The seven areas for future emphasis:

The OCA should retain and consult the written records of the Task Force as well as those of the HS and the MC with regard to Task Force recommendations, as background material for any future organizational revisions.

The OCA should retain the design of the four co-equal Chancery leadership positions. Those positions constitute a system of checks and balances that prevents undue responsibility from accruing to one or two individuals. Each position has key areas of responsibility and/or attributes:

The Chancellor is the “Priest of Priests,” and, as needed, the Primate’s representative. However, he is not the overall manager of Chancery functions or facility, nor is he the Primate’s Chief of Staff.

The Treasurer must have professional Accountant/CPA qualifications and should be a full-time position.

The Director of Ministries and Communications plays a critical role in the OCA’s essential mission. That position should be recognized as a fourth Officer of the Church in OCA Statutes.

The Secretary is the administrator of the Church and as such is an essential balance for the newly designed Chancellor position.

All future position vacancies in the Chancery/Central Administration must be publicly advertised. Advertising must include objective job-related qualifications criteria against which candidates must be rated to determine the selectee.

To assure continued accountability, all Chancery positions must have annual performance criteria and be rated against those criteria as a prerequisite for retention in the position and any affordable pay increases.

The Task Force wrote job descriptions for all Chancery positions, as well as human resource policies for managers and employees. Those documents must be maintained current and compliance with them should be audited annually. The MC Internal Audit Committee is an appropriate auditing agency.

The OCA should strive for greater diversity in clergy/laity status and gender within Chancery positions, especially leadership positions.

The OCA's Chancery is both a spiritual and a business entity. It should always be guided by Christian principles and also by sound and modern business practices.

## Background

His Beatitude, Metropolitan Herman chartered the OCA Organizational Task Force (OTF) on September 8, 2006, to study the organization of the Central Administration and make recommendations for improvements in efficiency, effectiveness, and operational expenses. The OCA Metropolitan Council voted at its November 2006 meeting, after hearing the first report from the Task Force, to continue its operations for two years. The Task Force comprised Robert Kornafel as Chairman, Dn. John Zarras, Peter Bohlender, Marty Brown, Al Wetmore, and Carol Wetmore as members, and Pdn. Peter Danilchick and Fr. Paul Kucynda as advisors. All served *pro bono*.

Task Force members met approximately 22 times in their 2+ years of existence. Dn. Zarras served as Transition Officer during key periods of Chancery change. They prepared and passed on to Chancery leadership a new organizational structure, job descriptions, recruitment criteria, and human resource policies and procedures to guide future operations. Their recommendations for a reorganized Chancery structure, selections for key positions, and policy and procedural changes were reviewed and adopted at periodic meetings, by the Metropolitan Council (MC) and Holy Synod (HS). Initially, the redesigned organization represented a streamlining of the structure from 29 to 23 positions and a cost savings in salaries and benefits of \$500,000 per year. Present on-board staffing is 15 due to contracting and other adjustments; changes in human resource policies further increased the savings.

Certain key issues emerged during the two-year life of the OTF and are presented here for reinforcement and follow-on action as deemed appropriate by the Primate, the MC, and the HS.

1. **Unprecedented Change:** The Organizational Task Force's existence, efforts, and recommendations were new to the Church. Its "no-holds barred" study of functions and design of positions were never before undertaken in the OCA. As such, it was essential that the MC and HS give close review and careful consideration of their

recommendations. This deliberate process, involving both specialists in management, organization, and human resources, as well as the governing bodies of the Church, is recorded in Minutes and Reports of the OTF and Minutes of the MC and HS.

*The OTF recommends that the records of these deliberations be maintained and appropriately consulted as the Church goes forward in planning its future.*

**2. Organizational Structure: Four Co-Equal Positions:** The Task Force envisioned and actualized, with MC and HS approval, four key Chancery positions: Director of Ministries and Communications, Treasurer, Chancellor, and Secretary, all interacting formally and informally with each other on a regular basis and representing their individual functions to the Metropolitan, who provides overall guidance, resolves disagreements, as necessary, and meets with his four leaders regularly to guide them. This structure is a marked change from the past, in particular with regard to the historic role of the Chancellor. The report of the Special Investigating Committee in September 2008 tragically reinforces the need to prevent unbridled power from accruing to one or two positions within the Chancery. To date, the recommended structure appears to be functioning as intended.

*For the future, it is essential that the equality of the four positions, and especially the role of the Chancellor as “priest of priests,” but not the alter ego of the Metropolitan, be viewed as essential to the Chancery structure.*

**Chancellor:** the “priest of priests” role of this position provides for a critical need in the Church: a position responsible for developing and nurturing the clergy resources of the OCA. Specifically, this position is responsible for “managing national-level clergy-related activities, including seminarian development and ordination, inter-Diocesan transfers, continuing education, and retired clergy and widows support.” In addition, recognizing the many liturgical and other demands on the Primate, the OTF provided that the Chancellor: “(a)s assigned, represent(s) the Metropolitan in religious and spiritual activities: act(s) in his stead in dealings with clergy, laity, employees, and organizations of the OCA and with other religious jurisdictions and lay organizations.”

*The historic “chief of staff” role of the Chancellor should not be reinstated. The newly designed position, with chiefly clergy-related responsibilities, needs clear recognition and reinforcement.*

**Treasurer:** the history of this position’s design and recruitment is illuminating. Debate, particularly within the MC, about the need for professional/CPA credentials, it’s part-time vs. full-time status, and the need for repeated announcements to attract qualified candidates is significant.

*Based in large part on the significant contributions by the first Treasurer since the reorganization, the OTF recommends that, for the foreseeable future, the Treasurer be a full-time professional accountant/CPA position. If recruitment/retention issues prevent*

*full-time staffing, professional accountant skills in one or more subordinate staff members are essential.*

**Director, Ministries and Communications:** this new position was created in recognition that (1) the primary task of the Church is to communicate the Gospel through word and ministry, and (2) communications within the Church and between the Church and those outside it needs improvement. The other three leadership positions exist to maintain compliance with Statutes and to perform essentially administrative functions. Yet, those administrative functions exist for one purpose: to provide the vehicle for communicating the Gospel and fulfilling the Great Commission to the peoples of North America. The Director of Ministries and Communications serves as the focal point, in coordination with the Dioceses, for determining how ministries work can most effectively be performed, setting goals, guiding, and coordinating, and evaluating the largely volunteer work of Church's ministries.

*In recognition of the importance of its functions, the Director of Ministries and Communications merits recognition as an Officer of the Church and a voting member of the MC. The OTF recommends the Statues Revision Committee take that action.*

**Secretary:** With the Chancellor responsible for national clergy issues and for representing the Metropolitan as needed, the Secretary is the administrator of the Church's business policies, processes, and day-to-day operations.

*This newly designed position provides essential balance with the new Chancellor role. The position is important too, for Best Practices compliance, since the Secretary is the action officer for the Church's procedures and records, including its Archives.*

**3. Open Competitive Recruitment – Objective Criteria:** Nepotism, favoritism and other indications of non-objectivity pervaded the Chancery in 2006. Unbiased selectors can only eliminate the loss of confidence of the Church at large and suspicion toward "Syosset" if, in the future, all positions are openly advertised and objective, job-related criteria are the basis for selection.

*As a minimum, all Chancery job vacancies must be announced on the OCA website before applications are accepted and reviewed, and when they are reviewed, pre-determined, written selection criteria must be applied by at least two impartial reviewers.*

**4. Objective Performance Review:** In 2006 the Task Force confronted a bloated organizational structure with overlapping responsibilities and little or no accountability. In recommending a lean organizational structure, they defined procedures for establishment of specific goals and performance criteria for each position, with annual performance reviews and outcomes for excellence or shortfalls in performance.

*It is essential that this accountability, i.e., written performance criteria and serious formal performance reviews, be actualized and not swept away in the press of day-to-day business. This should be an item for internal audit review annually.*



**5. Written Policies and Procedures:** In 2006, Chancery procedures were generally informal and unwritten. In accordance with Best Practices for Financial Accountability, the Task Force prepared written procedures for key processes and passed them to the Chancery leadership.

*It is essential that these procedures be maintained current and compliance with them be monitored regularly; otherwise, they become empty and meaningless. The MC Internal Audit Committee is an appropriate vehicle for this review.*

**6. Diversity:** The first incumbents of the four Chancery leadership positions are all priests.

*Recognizing the advantages of this homogeneity, the Task Force advocates deliberate action to attract and incorporate into the ethos of the Chancery especially the leadership positions, laity, including women, in future recruitment efforts.*

**7. Church and also Business:** The OCA is an organization based on the teachings of Christ. It is also an organization in the business sense: a group of people accomplishing specific responsibilities within a rational set of relationships. Before the reorganization, the Chancery was wholly hierarchal and generally undocumented: a single position wielded undue power. The new structure relies on the Christian principles of responsible stewardship and brotherly love but also on written business guidance such as job descriptions, goals and objectives, and procedures. The four leadership positions manage the business with which they are entrusted, but they also come together frequently and in love to plan, adjust plans, and assist each other. Similarly, administrative policies already in place, as well as those under development consider both responsible stewardship of OCA funds and compassion for those who may be adversely affected by those policies.

*The OTF recommends the Church's governing bodies give explicit consideration of both the business and the religious principles at stake in future examinations of Chancery operations.*

# Job Description for Chancellor

## Supervisory and Job Controls

The Metropolitan assigns areas of responsibilities and scope of decision-making but relies on the Chancellor as a trusted assistant and holds him accountable in assigned areas. In accomplishing work, follows legal, regulatory, and established Best Practices and Policies for Financial Accountability of the OCA, keeping the Metropolitan informed of non-routine issues and decisions. Work is assessed in terms of overall accomplishments, timeliness, and responsiveness to the needs of the Church, within assigned areas.

## Major Duties

Serves as assistant and advisor to the Metropolitan of the Orthodox Church in America, responsible for the development, nurturing, and welfare of the clergy of the Church.

1. Assists the Metropolitan in managing national-level clergy-related activities, including seminarian development and ordination, inter-Diocesan transfers, continuing education, and retired clergy and widows support. Works closely with the Church's hierarchs and seminaries to achieve programs in the best interest of the Church, its dioceses, and individual members of the clergy. As required, reports progress, problems, and recommendations to the Metropolitan, as well as the OCA's Councils, Synods, and membership.
2. Supports and/or guides and directs the work of assigned OCA Departments, Committees, Boards, and Commissions, related to clergy affairs: Department of Pastoral Life and Ministry, Department of Liturgical Music and Translations, and Committee on Diaconal Vocations. Assists in development of organizational goals and objectives including budget proposals, oversees progress against goals including financial stewardship, provides direction when necessary, assures appropriate coordination, ensures appropriate reporting to OCA Councils, Synods and membership and resolves problems that transcend individual organizations' scopes.
3. As assigned, represents the Metropolitan in religious and spiritual activities: acts in his stead in dealings with clergy, laity, employees, and organizations of the OCA and with other religious jurisdictions and lay organizations. In this capacity, acts to maintain the organizational integrity and further the growth of the Church.
4. Serves as First Priest of the Chancery Chapel.
5. Serves as a voting Member of the Metropolitan Council.

*Performs other duties as assigned.*

# Report of the Chancellor Archpriest Alexander Garklavs

## Introduction

The past three years in the Orthodox Church in America have been historic by any standard. A great tragedy has taken place. Pride may have fooled us into thinking that only other religious groups are subject to crises. But God in his wisdom has prepared a special trial for the Orthodox Church in America. *“For the time has come for judgment to begin with the household of God” (1Pt. 4.17)*. “How?” and “Why?” and “Who?” and “How much?” have been constant questions recurring in conversations, meetings, internet sites, investigations, deanery meetings, diocesan assemblies, chanceries, kitchens and lawyers’ offices. Some feel that the tragedy has ended, others see that the worst is over with a conclusion still forthcoming, still others would affirm that the drama has only just begun. We are taught that *“the Lord reproves those whom he loves” (Prov. 3.12)*. We should praise and thank God that He has loved us enough to make us face our mistakes and to provide us with a collective opportunity for learning. The errors of the past have been more or less uncovered, and now our primary ecclesial mission is to discern a way for moving forward; and then, to determine how we can best follow that way.

The Chancery in Oyster Bay Cove, commonly called “Syosset,” has been and remains in the eye of the storm. The purpose of this report is not to recount the history of what happened, which has been done elsewhere, but to share with you some of the highlights since I was appointed Chancellor of the Orthodox Church in America. The Chancery today is nothing like what it was, even a mere two years ago. We have gone through an almost total reorganization, from top to bottom. Those of us who are new to the Chancery came with a sense of urgency to get started on assigned tasks but discovered that the very process of reorganization required a good deal of adjustment. Changes, new personnel, new structures, new agendas, new procedures, etc.; these transitions are still ongoing. But a measure of routine has now emerged, as we find an effective balance between our personal responsibilities and the necessary tasks that emerge every day. In the near future we would like to see the realization of the hoped-for ideal: an orderly, cooperative, multitasking, efficient, energetic, creative and productive Chancery, serving the interests of the clergy and laity in the parishes and institutions of the Orthodox Church in America.

As we approach the 15<sup>th</sup> All-American Council, I would first of all like to briefly thank and recognize my three main colleagues, Archpriests Andrew Jarmus and Eric Tosi, and Priest Michael Tassos. I am grateful to them and to all of the Chancery staff. They are fine workers and good people, all in their own way working for the glory of God and the welfare of the Holy Orthodox Church. They have had to deal with many changes, which can easily disrupt and demoralize a work environment. Changes can be good or bad, but even good changes can be difficult. The difficulties notwithstanding, the current small

but hard-working Chancery staff has managed to retain its resolve and productivity during tough times. Always willing to heed good advice and constructive suggestions, we continue to learn and improve, almost daily. I believe that I can speak for the entire Chancery staff when I say that we all approach our work with seriousness, diligence and complete honesty. We recognize both the privilege and responsibility of working at the Chancery and we offer our very best efforts with a sense of duty and honor.

## **Chancellor's Role**

Perhaps the most satisfying aspect of the newly designed Chancellor's position is the responsibility of being the Rector of the Chancery's St. Sergius Chapel. The Chapel serves as the onsite house of worship for the staff. There is also a small community of devoted worshippers who regularly attend services. Recently we even baptized an infant parishioner. With the other Chancery clergy, we serve on a rotating basis. At present one of the new employees in the financial office is also functioning as choir director. This has been a welcome addition. In addition to regular weekend services throughout the year, most Feast Days and liturgical cycles are celebrated. The Chapel is also the site of liturgical services and meetings of the Holy Synod and Metropolitan Council. Although liturgical services sometimes force us to finish tasks after office hours, the spiritual and sacramental benefits of worship are invaluable. The office desk can never replace the altar table as the fundamental center of all aspects of Church life.

For most of the past three years, the Chancery staff worked under the hierarchical supervision of His Beatitude, Metropolitan Herman. Until his retirement at the beginning of September 2008, His Beatitude maintained a regular schedule of weekly visitations to the Chancery. When he was present, we were able to meet and discuss current issues. The telephone and fax machine made it possible to maintain a working relationship with His Beatitude when he was away. As Metropolitan Herman's health began to deteriorate, it became difficult for him to devote his full attention to the details of the problems that arose. It gradually became apparent that retirement was inevitable and we hope that his remaining years will be healthy and peaceful.

Following the reorganization at the Chancery, the role of the Chancellor is primarily directed to addressing pastoral concerns that involve parish priests, seminaries, and other matters related to priestly/pastoral activity. The responsibilities of the Chancellor as previously understood have been radically altered in the transition process. The expectations and responsibilities placed on the Chancellor, as well as those on my other colleagues, were done after much thoughtful discussion. However, the achievement of those expectations has not yet been possible. This is mostly due to the fact that, for the past year, the entire staff was in the process of reorganization. Another factor hindering our taking on more of the expected roles has been the emergence of unexpected problems that require immediate attention.

## Legal issues and procedures

In the job descriptions of the redesigned Chancery, legal issues are designated as responsibilities of the Corporate Secretary. Prior to the appointment of Archpriest Eric Tosi, the legal issues came to the Chancellor's office. For that reason, I was involved in last year's legal matters. Fr. Eric is now the contact person for forthcoming legal matters, but we continue to work together on those issues that are still pending. The legal matters are complex and require cooperative work by a number of people. Inasmuch as a good deal of my time and effort were devoted to these things, I offer the following comments, addressing two dimensions: 1) administrative procedures, and 2) brief summaries of the legal cases.

1) It would have been unthinkable just a few years ago, but we, as the entire Orthodox Church in America, are now engaged in lawsuits that are truly distressing and they require a response. Those responses must be formulated with two criteria: as Orthodox Christians with a deep spiritual tradition, and as citizens of a democratic society, where the rule of law is honored and observed. Consequently, these suits generate tension with the Church. Some are insisting that the civil law be carried out to its fullest extent and that all the guilty parties face the consequences. Others are adamant that the civil law cannot supercede canon law. The challenge for us is to adhere to our biblical and canonical toots as we acknowledge and uphold fundamentals of civil law.

As Orthodox Christians, we could begin by looking at the New Testament for some guidance. Here we find Jesus Christ's admonition to lawyers and apostolic warnings not to be too eager to judge others (*Lk. 11.46; 1Cor. 4.5*). On this issue, St. Paul is characteristically blunt: *"To have lawsuits at all with one another is defeat for you. Why not rather suffer wrong?" (1Cor. 6.7)*. Our spiritual tradition, as expressed in the writings of saints follows the apostle's teachings. *"Whoever has participated in divine knowledge and tasted the sweetness of God should not defend himself in law, and still less prosecute, even though someone should go so far as to strip him of his clothes" (St. Diadochos of Photiki)*.

But just as a human being is soul and body, and so too the Church is at once both the holy Body of Christ and the church which is an institution with formal structures. The Orthodox Church in America is the One, Holy, Catholic Church, but it is also a legally established institution and a recognized non-for-profit corporation. It has a Charter issued by New York State, corresponding tax-exempt status from the State and the Internal Revenue Service. As such, the church is subject to Federal and State laws and tax codes. Its internal governance is regulated by the procedures outlined in the Statute of the Orthodox Church in America. That Statute has the weight of a legal document and is thus recognized by our legal system.

Although there are gray areas, the Statute outlines the three main administrative units and their respective competencies: the Holy Synod of Bishops, the All-American Council and the Metropolitan Council. (The Chancery's Central Church Administration is less clearly defined; more about that below.) Although the supreme canonical body of the

church is the Holy Synod, it is primarily the Metropolitan Council's competence to deal with legal matters. To facilitate the Metropolitan Council's ability to address legal issues between sessions, it has selected a Legal Committee, presently chaired by Gregory Nescott. In addition, the Holy Synod approved the Metropolitan Council's proposal to retain the services of Thaddeus Wojcik, Jr. from the law firm of Eaton and Van Winkle, to be the church's General Counsel. We acknowledge their expertise and efficient work on behalf of the church, which has already borne fruit. Previously, other attorneys have also offered valuable help on legal matters. They too deserve our thanks.

All of us working on the legal issues have had to learn a great deal. The difficulty stems from the fact that the church is dealing with very complicated issues. At stake are issues such as fiduciary responsibility, business ethics, criminal infractions and tax codes. But we also bear in mind our spiritual heritage, with its ecclesiastical traditions and canon law. The facets of American jurisprudence must be seen through the lens of Orthodox Christian teachings.

The Orthodox Church in America should be grateful that the complexities inherent in legal issues are being addressed with competence. The Metropolitan Council's Legal Committee and the General Counsel are in contact with each other and keep the Central Church Administration abreast of their deliberations. All legal decisions made by the Metropolitan Council and the Legal Committee is submitted to the Holy Synod for review and approval.

There is something that all of us can do about these legal issues. Pray! Pray that the people directly responsible and involved in the law suits would come to feel God's mercy and love, pray that our lawyers and committees working on these things will be inspired with intelligence and wisdom, and pray that we, the people of the Church, regard these things with prudent concern and Christian compassion. While we would like to see the suits resolved expeditiously and justly, realistically we need to face the fact that sums of money will be spent and a good deal of time will pass until a conclusion is reached. We also need to accept the fact that the church's efforts here will not succeed without financial and prayerful support. May the God of Wisdom and Mercy guide our church into holiness and righteousness. *"For the Lord is a God of justice; and blessed are all who wait for him"* (Isaiah 30.18).

2) There are several law issues pending: a) those involving the former Chancellor of the Orthodox Church in America, b) a legal suit brought against the church by a woman in Maryland and c) issues stemming from an incident that occurred in Kodiak, Alaska. All of these issues are pending, involving lawyers and legal strategies. Therefore, it is possible to offer only a few comments here.

a) The facts and repercussions involving the financial crisis associated with the former Chancellor of the Orthodox Church in America, Robert S. Kondratick, are well known by now. Reports and documents are easily accessible on the OCA website and on other websites and forums. For the time being, the recent Report of the Special Investigative Committee (SIC) is the most comprehensive summary of the events that took place.

On December 24, 2007, the Orthodox Church in America was served with a "Motion for Summary Judgment" filed in New York state court by Elizabeth Kondratick requesting payment on an alleged promissory note for \$250,000, for repairs the Kondraticks purportedly made at the church-owned house in which they lived. The Metropolitan Council and Holy Synod retained the legal services of Attorney Jon Ward, from the Long Island firm of Sahn, Ward & Baker, to challenge the motion filed by Mrs. Kondratick. The judge subsequently denied the Motion for Summary Judgment, and Mrs. Kondratick then filed a civil complaint seeking to enforce the note. Mr. Ward has responded, and the matter is heading into discovery, with the possibility of a court trial down the road.

In the meantime, the Metropolitan Council decided to file counterclaims against the Kondraticks, demanding repayment of \$1,500,000 of church funds which, during the former Chancellor's tenure, were disbursed with no record of receipts or are unaccounted for. The Holy Synod reviewed the counterclaims suit and accepted the Metropolitan Council's recommendation. Attorney Jon Ward filed a "Summons with Notice" with the New York state court in Nassau County in May, 2008. The Kondraticks have now been served with legal papers. Mr. Ward is preparing a detailed Complaint that will present the substance of the church's claims against the Kondraticks.

We understand that the Kondraticks are preparing to bring another suit against the Orthodox Church in America, requesting \$25,000,000 in damages, for wrongful termination and defamation. This has been filed with the New York state court in Nassau County, but as of yet, papers have not been served.

Significant financial resources and time have already gone into these matters. More money and time will surely be spent in days to come. Following the recommendations of the SIC Report, the church is committed to pursue legal action at this time. A prediction on the outcome is impossible.

b) A suit against Metropolitan Herman and the Orthodox Church in America has been filed by a woman living in Maryland. The case was filed in May 2008, but it involves issues that allegedly occurred during 2005-06 between her and a priest, who was her supervisor at a senior citizens home. Attorneys have been retained to represent both Metropolitan Herman and the Orthodox Church in America. Although the charges against His Beatitude and the church are similar, the need for separate counsel was to preclude any potential conflict of interest. The church and Metropolitan Herman are two of multiple defendants and so there are several lawyers involved in this case.

c) An incident involving a cleric of the Orthodox Church in America purportedly occurred in Kodiak, Alaska on May 16, 2006. Several weeks later, the incident's alleged victim appealed to the church for an investigation. The victim was then terminated from his position at St. Herman Seminary. Eventually the victim's attorney's filed a wrongful termination complaint with the Equal Employment Opportunity Commission (EEOC). The Orthodox Church in America's internal investigation has been questioned by the

victim's lawyers. At present, discussions are taking place between the parties regarding this matter.

The Holy Synod of Bishops and the Metropolitan Council have worked together with the General Counsel and the Chancery overseeing the progress of these legal issues. There have also been discussions by the Metropolitan Council to set up protocols for proper management in responding to sensitive issues that come up, thereby avoiding the possibility of lawsuits. The procedures and processes of the church's Office for Review of Sexual Misconduct Allegations are also under review.

## **Pastoral Issues**

Because of the matters mentioned above, I have not been able to devote enough time to the strictly pastoral aspects of the Chancellor's duties. A variety of pastoral matters come across my desk almost daily, whether it is a letter involving clergy transfers, phone calls from priests with mundane or serious problems, charity requests, or inter-church matters from other jurisdictions. Communication with the seminaries is ongoing, even if time constraints prevent more frequent contacts. We are in the process of reconfiguring the Department of Pastoral Life and Ministry. I look forward to working with a new Department chair and members on projects that will focus on the parish pastors' lives and ministry.

The Diaconal Vocations Program (DVP) continues to attract candidates who have the holy call to serve the Church as ordained ministers, but who cannot attend one of our seminaries. At present, the Priest Martin Kraus has been assisting in the DVP. I thank him for his help. About a dozen men are currently enrolled in the program. About that many have completed the program during the past three years, many of whom are now ordained deacons or priests serving the Church. The DVP needs to be reviewed and refashioned. The variety of applicants, the diversity of backgrounds and expectations, requires a more diversified program. Hopefully, we will soon commence on this. It will improve and expand the program.

I also want to thank the Priest Steven Voytovich and the members of the Seminarian Internship Program (SIP). The program has been operational since the 12<sup>th</sup> All-American Council in Pittsburgh (1999). Fr. Steven's commitment to it has been inestimable. There is no reason that the SIP cannot continue, even as the seminaries expand their own internship initiatives. Continuing internship in any fashion will be beneficial for newly ordained, younger priests. We would also like to explore the possibility of allowing non-priestly interns (such as youth workers and/or choir directors) to work with qualified mentors in those fields.

Pastoral duties took me to Alaska this past year, and also to Australia. The Alaskan trip took place under painful and difficult circumstances. A chapter has been closed in Alaska, and a new one is now opening. With Bishop Benjamin becoming the Metropolitan's official Alaskan overseer, my involvement has been limited to periodic phone calls. Our Diocese of Alaska, as far as it is, is very special and extremely



important for the Orthodox Church in America. The role of the Holy Synod and the Central Church Administration in facilitating the restoration of normal diocesan life in Alaska is noteworthy; but a full assessment of this is yet to come.

At one time the Orthodox Church in America provided extraordinary canonical protection to three parishes in Australia. At present, only one is somewhat active and viable. My visit to Sydney was in response to an invitation from St. Michael's Parish, to address pastoral and parish concerns. While the long-range future of the community is uncertain, the parish continues to maintain its connection to the Orthodox Church in America for the time being.

## **The role of the Central Church Administration**

At present, the Central Church Administration is in the process of recovery and discovery. The recovery has to do with regaining equilibrium after the tumultuous episodes of the recent past. While today's Syosset is completely different than it was under the previous administration, a great deal of residual mistrust and anger remain. Overcoming that will take time, but the restoration of trust is one of the fundamental tasks for Chancery personnel. The task is not simply to regain support for the Chancery itself; rather, we need to facilitate a restoration of respect for the concept of the Central Church. In large measure, the problems stem from the fact that there was no clear vision or understanding about the role of the Central Church Administration in the life of the Church. Therefore a discovery process must take place. This is also something that the SIC Report suggested, when it recommended a long-range strategic plan.

What is the proper role of the Central Church Administration in the overall life of the Church? The discovery process will take time but some things are self-evident. The Central Church Administration constantly and directly interacts with three dimensions of Church life: the Primate, the Holy Synod and the Metropolitan Council. The OCA Statute gives a good deal of direction on the specific competencies of the Metropolitan, the Holy Synod and the Metropolitan Council. Missing in the Statute are guidelines about how these components are to work together. Also missing are descriptions about the functions of the Central Administration. In many ways, the Central Church Administration is the hub of interaction between the Metropolitan, Holy Synod and Metropolitan Council; coordinating meetings, issuing reports and implementing decisions. Among the significant and positive changes that have occurred during the past year is the clarification of the respective roles within the administration of the Church. A number of specifics can be cited: the regularity of joint sessions of the Holy Synod and Metropolitan Council, the work of the Organizational Task Force, the formation of committees in the Metropolitan Council (e.g., Ethics, Internal Audit, etc.), the recommendations of the SIC Report. These represent the establishment of a significant momentum. The development of a strategic plan will now coalesce parts of the discovery process into a unified program that will lead to the formation of sensible protocols and effective processes of governance.

# The pastoral vision for the Orthodox Church in America

I came to the Chancery after twenty-five years in the parish ministry. It was absolutely clear to me as a parish priest and it has been powerfully reaffirmed that the parish is the fundamental unit in the Church. Of course, bishops are the archpastors, the arbiters of dogma and the principal administrators of the Church. But the parish and the parish priest are at the center of what is fundamental in the life of a Church. The people in the parish, together with its pastor, constitute the Church's strength, vitality, stability, creativity and capacity for productive growth. Sanctity and wholeness emerge and are nurtured among families in parish communities. The parish is the visible expression in a given place and time of the glorious and eternal mansion of our Lord that is our only true home.

The ethos of the Orthodox Church in America is particularly pastoral because our history is rooted in parish life. Our first saint, St. Herman, may have been a monastic, but North American Orthodoxy is mostly the story of missionary work and parish growth, rather than monastic expansion. Early on, there was an element of political/ethnic propagation. That is, parish centers were established to teach foreign languages, folk dancing and ethnic traditions. But from at least the last half of the last century, our Church took definite steps to transcend those political/ethnic elements. The Russian and Eastern European priests and people treasured their ethnic traditions, but they also realized that the Orthodox Church in North America would have to adapt to regional languages and traditions. Great leaders, such as St. Innocent, St. Tikhon, Metropolitan Leonty and others, were true apostles who set the course for generations to come. The Orthodox Church in America came about because of their wisdom, willing to share and sacrifice.

Through God's grace and the hard work of many, many people that pastoral vision reached critical mass thirty-eight years ago when autocephaly was achieved. For thirty-eight years, the Orthodox Church in America has been on a courageous journey that has taken us through amazing moments of triumph and humiliating times of despair. In spite of the difficulties that have occurred and still exist, the pastoral vision remains. It is the vision of a vibrant Church in North America, that is rooted in Scripture and Orthodox Tradition, spiritually centered, sacramentally empowered, charged with evangelization, welcoming all, grateful for the opportunities present here, energized with creativity, made authentic by works of charity, and committed to peace in the world, among religions, between churches, races, neighborhoods and all people.

This pastoral vision is our treasure and its legacy for us requires sober reaffirmation. In part that means taking Church history into account and the positive role of the administration of the Central Church in that history should be recognized. The negotiations that took place to prepare for autocephaly were conducted by the Central Church Administration. The initiatives and work done on liturgical translations was coordinated by the Central Church. So too are the excellent liturgical music resources

that are available. Pastoral conferences by the Department of Pastoral Life and Ministries brought together clergy for all of our dioceses for meaningful fellowship and learning. But perhaps the most lasting of the Central Church Administration's efforts would be the state of continued pastoral consciousness. As the coordinating agent for the Holy Synod and Metropolitan Council, the Central Church Administration should somehow always keep the interests of the parish and pastor on its agenda. This could take the form of bringing the subject up in conjunction with strategic plans, budgets, pan-Orthodox events, inter-church meetings, etc. Visiting parishes and deaneries to explain why and how the Central Church's activities affect parish life is consistent with our pastoral vision. Finally, the development of our pastoral vision should be as inclusive and comprehensive as possible. Here the Central Church would play the role of intermediary consolidating information from various dioceses into a synthesis of principles and goals. As we face the many challenges of life in twenty-first century, the pastoral vision of our Church will continue adapting, making the Gospel of Our Lord Jesus Christ and the holy traditions of Orthodox Christianity accessible and meaningful to contemporary North Americans. All of us will have something at stake and all of us will work together to insure that this vision will endure.

## The All-American Council

Work on planning the 15<sup>th</sup> All-American Council has preoccupied the Central Church Administration during the past several months. In conjunction with an excellent Preconciliar Commission, chaired by His Grace, Bishop Nikon, we have been thoroughly engaged in the preparations of the 15<sup>th</sup> All-American Council. Both Archpriests Eric Tosi and Andrew Jarmus have been hard at work, focusing on the Council and supervising our staff's efforts for that purpose. The Local Committee, co-chaired by Archpriest William Evansky and Matushka Myra Oleynik cannot be thanked enough for their fine efforts. We cannot overlook the extraordinary work of Council Manager, Archpriest Myron Manzuk. Unfortunately, due to medical reasons, he will not be present with us in Pittsburgh. But his work during the past two years was instrumental in making this Council possible. Even now, from his laptop at home, he continues to guide and inspire us.

This Council comes at an extraordinary time in our Church's life. There are some crucial decisions to be made and important issues to discuss. Of course, we will participate in the selection of a new Metropolitan. But we will also come together to pray, to confess, to discuss, to share and learn. In this way, we will engage in the wondrous process of spiritual deliberation. The Orthodox Church is sometimes called the "Church of the councils." This All-American Council will be another important manifestation of that conciliar spirit. "*Great indeed, we confess, is the mystery of our religion,*" we read in the First Letter to Timothy (1Tm. 3.16). What can be more magnificent or beautiful than the gathering of the community of faithful people. With humility and joy we must do our part, answering the call to witness to the grace given to us, as members of the Orthodox Church in America. "*For to this end we toil and strive, because we have our hope set on the living God, who is the Savior of all, especially of those who believe*" (1Tm. 4.10).

# Job Description for Secretary

## Supervisory and Job Controls

The Metropolitan assigns areas of responsibilities and scope of decision-making but relies on the Secretary as an expert on managerial and administrative matters and holds the Secretary accountable in assigned areas. Discusses progress and major issues with other members of the Administrative Team for coordination and input. Follows legal and regulatory guidelines as well as the Best Practices and Policies for Financial Accountability of the OCA and keeps the Metropolitan informed of non-routine issues and decisions. Work is assessed in terms of overall accomplishments, timeliness, and responsiveness to the needs of the Church, within assigned areas.

## Major Duties

1. Serves as the primary administrative manager of the OCA. Performs or directs the following:
  - Maintaining the legal status of the OCA. Implements and assures compliance with Federal, State, and local statutes and other relevant regulatory requirements.
  - Supporting the Church's Councils and Synods. Serves as team leader for planning and logistics of All-American Councils. Records or arranges for recording of the activities of the Holy Synod and other Councils. Attends meetings and maintains minutes files.
  - Collecting, analyzing, summarizing, preserving, and serving as repository for the OCA's official records and materials, including its Archives. Provides reports and other information to the Holy Synod, Metropolitan Council, Legal Advisory Board, Commission on Canons and Statutes, Canonization Commission, and other persons and entities, as required or requested.
  - Guiding and directing the work of the Department of History and Archives. Assists in development of goals and objectives, oversees progress against goals, provides direction when necessary, assures appropriate coordination, and resolves problems that transcend the Department's' scope.
  - Serves as a voting member of the Metropolitan Council.
  - Serves as the officer of the Church responsible for assuring regular ongoing communication between the Metropolitan and his executive staff and for communication among the members of the executive staff. Records objectives and goals established in joint officer and officer/Metropolitan

meetings including timelines for their accomplishment. Records progress against jointly established timelines and goals as part of regular meeting agendas.

2. Directs the administrative, housekeeping, estate management, and personal service functions of the OCA Central Administrative Offices. Functions supervised include human resource management, including benefits administration and personnel investigations; correspondence and records management; support to boards and councils; information technology; travel arrangements; and facilities maintenance. Establishes policies and procedures, supervises staff, and assures compliance with legal, regulatory and established best practice guidelines. Supervisory duties include assigning work, reviewing progress, accepting or rejecting results, evaluating performance, and resolving on-the-job problems.

*Performs Other Duties as Assigned*

# **Report of the Secretary Archpriest Eric George Tosi**

**“Let all things be done decently and in order.”**

**1 Cor 14:40**

## **Introduction**

In July 2008, I arrived onsite as the new Secretary of the Orthodox Church in America. The OCA had not had a full-time Secretary for the Church for some time. This, combined with the recent reorganization of tasks meant that there was a steep learning curve with little time for orientation. But with God’s grace and a wonderful support staff, I was able to jump into the position fairly quickly.

The position of Secretary basically is that of the chief administrative officer of the Church. Many of the responsibilities are to provide a link between the Holy Synod, the Metropolitan Council, the Central Church Administration and the Church as a whole. The Secretary needs to be able to facilitate the flow of work between all of these groups while providing good order in the management of the Church. The areas of responsibility are fairly diverse, so that the Secretary needs to be able to perform many tasks at one time. In addition, the position will be evolving over time. Many of the tasks of the Secretary had been split between the Chancellor and the other officers. But the transition of these tasks to the office is taking place.

## **Overview**

The duties of the Secretary as the chief administrative officer have been divided into seven major areas. Each of these areas relate to the overall operation of the Church, the Central Administration and the Chancery estate. Some areas have traditionally been the domains of the other officers but this new division allows for a more effective means of management. Each of the officers is equal in position and report to the Metropolitan and is answerable to the Holy Synod, the Metropolitan Council and the Church at large.

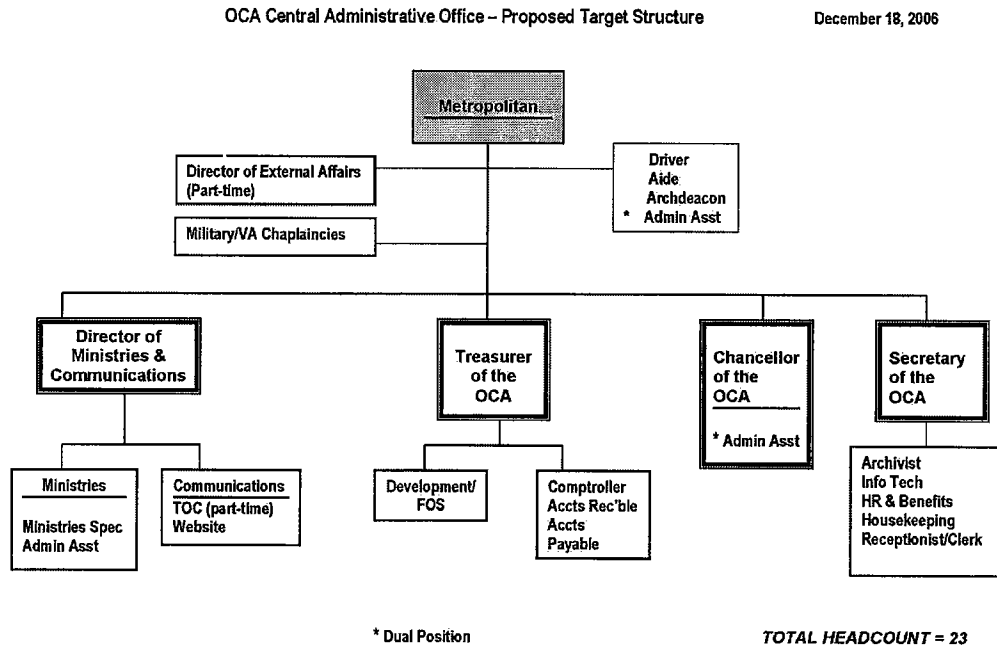
The seven major areas of responsibility of the Secretary are as follows:

- Human Resources
- Management of Councils, Synods and Meetings
- Estate Management
- Archives
- Legal
- Chancery Operation
- Other duties as assigned

As such, it is a fairly diverse task that requires a strong support staff. There are days when I can jump from legal issues to repairing a toilet to arranging for a meeting. Yet each of these functions is critical to the operation and good order of the Church. The immediate major area of concern was the planning and operation of this All-American Council. Recent events made this Council particularly challenging. The work of the Preconciliar Commission and the local committees ensured that the Council planning was already far along when I arrived.

## Human Resources

An immediate and important area was human resources or the management of the personnel of the Chancery staff. The good work of the Reorganization Task Force in conjunction with the Metropolitan Council had begun the process that was recently brought to completion. As seen in the Reorganization Task Force recommendations, there was a hard (and in some cases painful) look into the operations and personnel at the Chancery. Throughout this period, the functions were redefined, the number of personnel on the staff examined and finally a new system was put in place. The staff was reduced from 37 (full and part time) to the current level of 11 people (and 3 part time) with a savings of \$500,000 to the annual budget. This is a salary reduction of 16.5% and associated expense reduction of 25-35%. Persons for the new positions were interviewed and hired through the transition period. A new flow chart was introduced, salaries standardized, job descriptions and evaluations were established and the operations were aligned. The following chart illustrates the new organization of the Chancery staff.



To date, many of these positions have been filled. In fact, some positions are filled by people doing multiple roles to further decrease expenses.

Each of these positions now has a job description similar to the one at the beginning of this report. These have been approved along with the evaluation forms for each position, given to the person and signed by each. Each personal file has been successfully audited by both internal and external organizations for all relevant information including paperwork required for employment in the United States. Other documentation includes vacation tracking, time sheets, personnel information and other relevant documents. One of the recommendations of the Task Force was the implementation of “Best Practices.” As such, each employee has signed the required forms on “Conflict of Interest”, “Whistleblower Policy” and “Code of Ethics.” These forms will be reviewed and signed annually by all employees.

Another important step in the reorganization was the writing and acceptance of the **Policy and Procedures Handbook** and the **Employee Handbook**. These have been successfully reviewed, accepted and received by every employee and are in line with standard government policy. These handbooks are now the standard operating procedure for Chancery operations. Finally, there is now a complete set of forms for all areas of operations from vacation requests to employee complaints.

There is still some work to be completed by the end of the year. As part of a 501 (C) 3 organization, all parishes and institutions must have a file with the parish bylaws, articles of incorporation and other relevant material. Then they can be issued a letter qualifying them for blanket coverage under the OCA’s tax-exempt status. Letters are issued on a weekly basis to parishes still not in compliance or requesting such listing. A full audit of all these files must be conducted annually and a new list sent to the IRS by the end of the year. This is in progress and will be completed before the end of the year. We are also looking at the health coverage of the staff in order to find a more effective plan.

## **Management of Councils, Synods and Meetings**

This is a continual operation that includes not only the logistics of each meeting (which can be quite complicated) but also the actual operation of each meeting. This requires coordination across a wide spectrum. The largest of these meetings is the All-American Council held every three years. The planning is complex for a normal time and even more complicated over the past year. But the good work of the local staff, local committee and, of course, the Preconciliar Commission made such a Council possible.

But this is just one meeting of many that occur on an almost weekly basis at the Chancery or around the Church. The semi-annual Holy Synod meeting, Metropolitan Council meeting and the host of departments, boards, commissions and offices meetings require the same attention. And all of these have agendas, minutes, logistical consideration, etc.



Through the great work of the Chancery staff and others, we are able to keep on track of these and bring them to a successful conclusion.

## Estate Management

The question of the continued use of the Chancery, formally known as the Westwood Estate, has been a topic of discussion over the past year. The Church was given this estate in 1957 for the cost of \$1. Since then it has served as the Metropolitan's residence, St. Sergius Chapel, Chancery offices and the center of operations for the area. The building has been well maintained and is in excellent shape, sitting on 15 acres of land in Oyster Bay Cove, Long Island (the Syosset address is the mailing address for the local area.)

The building continues to serve the Church well. It is easily accessible from New York City and within driving distance of the headquarters of all the major Orthodox jurisdictions. It houses the Primate's apartment, chapel, meeting rooms, Chancery offices and the archives of the Orthodox Church in America. It is in excellent physical shape and has no major problems. Most of the work that needs to be done is either cosmetic or maintenance. This summer two teams of contractors and two teams of real estate agencies did a complete review of the building and the estate. Both reported on the excellent condition of the building and grounds. The Metropolitan Council did commission a committee to review the sale feasibility of the estate and decided to withhold judgment for the time being. This was due to the weak real estate market, lack of long term planning and necessity for continuing operations. In addition, it may take up to four years to complete such a process.

It must be said that a long hard look was done with the operations. The good news is that the annual operation of the Chancery is well within the expenses of the area. It was also cheaper to operate than rent a similar facility. Much work has been done with the Treasurer to ensure an efficient operation as well as a cost analysis of the building and grounds. The projected future expenses will involve painting of the building, minor repairs and grounds maintenance. The following is the annual expense of the Chancery building.

Operation	Expense	Note
Fees to Oyster Bay	\$28,000	To Oyster Bay Cove for Police, etc
Facilities and Equipment	\$23,000	Leases and Equipment
Operations	\$18,000	Maintenance
Payroll	\$45,000	Housekeeping, etc
Utilities	\$35,000	Gas, Electric, etc
Insurance	\$23,000	Liability, etc
Other	\$4,000	Misc
<b>TOTAL</b>	<b>\$176,000</b>	<i>\$14,666 a month</i>

The total space of the Chancery building is 12,755 square feet. The current rental market for *most* metropolitan areas is \$30 a square foot. Even utilizing 8,000 square feet (which does not provide for apartment, archives and chapel) the cost would be \$240,000 a year or \$20,000 a month excluding other costs. With the exception of the capital tied up in the building, the building serves the Church well and is cost efficient for the operations.

There has been some talk of selling portions of the property. This has been explored and may be considered in the near future. There are two 2 acres lots in the rear of the property that may be re-zoned and may yield the Church \$3 million that can be used to pay back the Honesdale loan and be used for funding of projects. This process will take time and consideration (over 2 years), as the legal, engineering and other matters need to be worked through. Other options are being explored to find the most efficient use of this irreplaceable asset.

## Archives

A more complete report on the archives of the Church can be found in the Department reports. Alex Liberovsky continues to serve the Church well in maintaining this invaluable resource. The archives are currently housed in the basement of the Chancery. They provide an immediate and necessary resource for the Church. Very often, they are needed to answer an important question at a meeting or to understand a particular issue in more detail. These are answered quickly and authoritatively. In addition, there are requests from around the world for information that can only be found in the Archives. So they are one of the most valuable resources of the Church.

We are looking at ways to improve the preservation of archival materials and their accessibility to the public. Alternative housing and upgrades are being explored. It is also hoped to convert many of the documents to electronic form where they can be accessed over the Internet. There are grants and funds available for not only a building but also for conversion. These are being researched and hopefully the full potential of these resources can be better utilized.

## Legal

Unfortunately, we are in a time of multiple legal actions. Our new General Counsel, Thaddeus Wojcik in conjunction with the Legal Committee of the Metropolitan Council, oversees these actions. Their work is absolutely essential for the future operation of the Church and timely resolution of the issues.

While specifics of the legal action are outside the purview of the office and cannot be spoken of in length due to legal issues, it is important to note the operational aspects. The Secretary is responsible for the management of the information flow between the legal counsels, the Holy Synod, the Metropolitan Council and the Central Administration. The collection and dissemination of documents, referral of legal issues to the legal team, and the timely reporting of the issues are within that responsibility. Since this is new to

the operation of the OCA, the system is being refined to ensure proper and timely action and keeping costs to a reasonable level. Any questions about specific legal actions or concerns should be addressed to the legal team.

Other legal issues are the review and clarification of the Statute of the Orthodox Church in America. This is especially critical in its relationship with Orthodox Canon Law. So often when questions about the Statute or canon law come to the office, they are referred to a specialist in this area for comment or decisions. It is also hoped that over the next three years, a complete review and rewrite of the Statute will be accomplished with a team of specialists in order to better define and articulate the vision of the Orthodox Church in America.

Finally, an important element is maintaining the legal status of the Orthodox Church in America through the review and filing of important documentation required by the city, county, state and the United States government. This ensures the proper administration of the non-profit status of the Church.

## **Chancery Operation**

While many elements of this area have been spoken of earlier in the report, it is important to note the ongoing operation of the Chancery. This includes direct supervision over housekeeping, reception, grounds keeping, information technology, repair work and other associated operations. These are accomplished either through full-time employees (i.e. housekeeping and reception), part-time employees (i.e. handyman and repairs) or contract workers (i.e. information technology, grounds, and ad hoc repair work such as plumbing). The most cost efficient methods are constantly being explored and utilized to keep operational costs to a minimum. The gradual improvement of the grounds is a visible example of this attention.

Other operations are ongoing and often unnoticed. Maintaining a large building is continual work and our housekeeper does an exceptional job. People notice when the building is unkempt but rarely notice when it is kept clean and in good order. This is vital since there is a host of announced (and unannounced) visitors on a weekly basis. In addition, there are many meetings that often run late into the evening over numerous days. Her work during this time is invaluable.

There is also a continual need for the upkeep of the many files and records at the Chancery as well as the maintenance of the actual office spaces. All of these are under review with a reorganization and efficient use of space being planned. The best way to understand this is to come the Chancery and see the tremendous volume of work that goes on here on a daily basis whether it is services, answering questions or just the daily operation of the Church.

## **Other Duties As Assigned**

The only way to really speak about this is that on any given day, there is a host of emails, phone calls, special requests, need for guidance or clarification that come into the Chancery. All of these require time and attention and most importantly, the correct answer or decision. This work of the Church must be transparent for good and orderly operation. It must also present the Christian spirit of love and faithfulness. This must all flow to anyone who has contact with the Chancery. As the operations continue to improve, the need for this work will become more evident.

## **Conclusion**

I came to appreciate the volume and diversity of the work after I began the work of the Secretary. The last few months have been educational. But only through the proper, efficient and open operation of the Church can any of this be accomplished. I am humbled to be working with such a fine and dedicated team of officers who truly desire the best for the Church. They have all given up something in order to be at the Chancery and they did so out of a love for the Church and represent some of our very best. They all need to be in our prayers as they struggle with the daily work of the Church. We also must be reminded that with each officer and employee, there are many, many volunteers and experts who give of their time and talent for the good work of the Church and often on a *pro bono* basis. Their work may never be fully known or recognized but it is because of their efforts that we are able to do our jobs. May God Bless Them All and Grant Them Many Years!

# **Job Description for Treasurer**

## **Supervisory and Job Controls**

The Metropolitan assigns the overall area of responsibility, to wit, financial management of the OCA, and discusses with the Treasurer priorities, sensitive issues, and expected results. Within those constraints, the Treasurer proceeds independently, keeping the Metropolitan informed of extraordinary events. The Treasurer conducts financial activities in keeping with the Best Practices and Policies for Financial Accountability of the OCA. The Treasurer serves as administrative liaison on the Finance Committee of the Metropolitan Council. The Metropolitan does not generally review work in progress, but reviews major financial reports and decisions because of potential for far-reaching impact on the OCA.

## **Job Summary**

Serves as Chief Financial Officer of the OCA. Ensures the effective execution of its Best Practices principles and policies for non-profit financial accountability and works closely with the Metropolitan Council to assist them in their financial governance responsibility. Implements and maintains internal controls for the protection of assets and reliability of financial statements. Develops plans and projections linking strategic goals and measurable objectives. Manages budgeting, auditing and reporting systems. Represents and is the primary advisor to the Metropolitan on financial management.

## **Major Duties**

1. Manages OCA budgeting, expense management and financial accounting activities. Develops and administers for all funds, an accounting and budget system consistent with the information and reporting requirements of internal and external agencies and provides responsible stewardship to the Metropolitan Council and donors. Following discussions with the Finance Committee, prepares the annual operating budget and submits it for the Metropolitan Council's approval. Oversees execution of the approved budget. Manages cash flow, directs transfer of assets, and controls line items of expenses for accomplishment of the Church's missions. Assists Department Chairs in presenting their annual funding requests. Coordinates development and secures approval of capital budget. Monitors the budgets of capital projects.
2. Oversees all aspects of income development, e.g., income from diocesan assessments, special appeals, Fellowship of Orthodox Stewards, endowments, grants, gifts, trusts, and investments. Directs fund-raising encourages and oversees development and growth of endowments, and provides for the investment and management of endowment funds. Reviews reports from investment managers of long-term assets and, with the Investment Committee, evaluates performance of investments and, as appropriate, reallocates assets.

Ensures that all fund-raising is within the context of Christian stewardship practices, Best practices and policies of the OCA, including the Donor Bill of Rights.

3. Performs a variety of ongoing financial activities typified by the following:

- Submitting financial status reports to the Holy Synod of Bishops, Metropolitan Council, and general membership.
- Developing and maintaining primary banking relationships, cash management systems, and credit arrangements.
- Insuring financial transparency and providing for regular independent audits.

4. Supports and/or guides and directs the work of the Office of Development and Stewardship. Assists in development of goals and objectives, oversees progress against goals, provides direction when necessary, assures appropriate coordination, and resolves problems that transcend individual organizations' scopes. Provides reports and other information to the Metropolitan Council's Audit and Investment Committees, as required or requested. Ensures full cooperation with the OCA's internal and external auditors. Works closely with the Finance Committee for effective and complete reporting to the Metropolitan Council.

5. Serves as a voting member of the Metropolitan Council.

6. Supervises a small staff engaged in financial support activities. Sets goals, assigns work, reviews progress, and evaluates performance.

*Performs Other Duties as Assigned*

# Report of the Treasurer

## Priest Michael Tassos

Thank you for the opportunity to address the 15<sup>th</sup> All-American Council and to present this report. It represents the labors of many who helped to bring it to fruition. Since the last All-American Council, we have discovered much about the accounting and finances of the Central Administration. As it has been widely reported, many of the basic checks and balances that were assumed to be in place at the Central Administration did not exist. Please let me be clear at the outset, this report is not like the reports of prior Treasurers. What has happened to the OCA will have lifelong effects. It is quite possible that many questions will never be answered, that there may be inconsistencies, or that we have overlooked or even accidentally dismissed certain issues. I assure you that we are trying to address every issue and concern and to be completely transparent in the process. I kindly request your patience and understanding as we move forward.

The following words from the canon of St. Andrew of Crete express where we are: *“Return, repent, uncover what is hidden.”* For the last two years in particular, the members of the Holy Synod, the Metropolitan Council, the Organization Task Force, the Special Investigation Committees and the Chancery Administration have all been working hard to “uncover what is hidden.” This financial report is a summary of the journey thus far. I can not emphasize enough that what happened at the Central Administration was not just that money went missing but that there was a complete and total collapse of an accounting and financial reporting system that will take years to restore. We have made great strides in the past year but there is more to be done.

Following are the condensed balance sheets for the Orthodox Church in America for the years 2005, 2006, 2007 and through the first six months of 2008. The information for the years 2005 and 2006 was completed by Lambrides, Lamos, Moulthrop, LLP. The information for the year 2007 was completed by me and is currently under audit by the Certified Public Accounting firm of Weiser, LLP. The information for the six months ended June 30, 2008 was also completed by me. As has been widely reported, there were numerous problems with the accounting records that we are only now getting our hands around. Several versions of the reports have circulated. I believe that the reports contained here are the most accurate versions to date.

There have been a number of well-documented errors and omissions in the financial reports for the years 2005 and 2006. An example of this is the September 27, 2006 letter from Lamos, Lambrides, Moulthrop, LLP to the Orthodox Church in America. In that letter they stated the following:

“The Orthodox Church in America was unable to provide adequate documentation for significant expenditures for the years 2004 and 2005.

The Church was also unable to provide adequate supporting documentation for the expenditure of donor restricted contributions for the years 2001 through 2005. This included charities appeals for Emergency 9/11 Relief, Christmas Stocking Project, and Assistance, among others.

Since adequate documentation is not available, we are unable to complete the audits of the financial statements for 2004, and 2005 at this time.”

**Condensed Balance Sheet**

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>6/30/2008</u>
<b>ASSETS</b>				
Cash	95,289	680,637	679,696	807,713
Accounts & Notes receivable	59,306	95,056	248,427	98,386
Prepaid and inventory	40,668	113,187	91,137	105,897
Investments	2,741,333	2,941,212	2,788,722	2,543,999
Land, building, and equipment	880,458	761,615	416,632	429,352
Total assets	<u>3,817,054</u>	<u>4,591,707</u>	<u>4,224,613</u>	<u>3,985,347</u>
<b>LIABILITIES</b>				
Accounts payable and accrued expenses	490,587	207,452	214,543	68,128
Loans payable	917,525	1,727,026	1,096,889	1,036,633
Deferred compensation	188,300	151,863	66,158	63,465
Annuity & unitrust agreements	478,507	521,213	521,210	521,210
Total liabilities	<u>2,074,919</u>	<u>2,607,554</u>	<u>1,898,801</u>	<u>1,689,436</u>
<b>NET ASSETS</b>	<u>1,742,135</u>	<u>1,984,153</u>	<u>2,325,813</u>	<u>2,295,911</u>
Total liabilities and net assets	<u>3,817,054</u>	<u>4,591,707</u>	<u>4,224,613</u>	<u>3,985,347</u>

In addition to the comments from Lambrides it should also be noted that through 2006:

- money that was received for restricted purposes was not properly segregated but combined with the unrestricted operating funds,
- the records to support permanently restricted net assets, i.e. contributions to the OCA’s endowments, were missing or incomplete, and
- a number of liabilities, such as some of the debts related the 14<sup>th</sup> All-American Council, were either not completely disclosed or included in the financial records.



What can we glean from all this? It is safe to say that prior to 2006, the Orthodox Church in America was in terrible financial shape. It was grossly behind in paying its bills, the books were frankly unauditible, and the Central Administration was taking money from Restricted Funds to pay for general operating expenses.

How did all of this happen? The root causes for these problems were: (1) unqualified and untrained staff in positions of authority, (2) lax internal controls, (3) a disconnection between members of the Central Administration, the Metropolitan Council and the Holy Synod, (4) greedy and dishonest individuals, and (5) severe underfunding of the Central Administration in certain key areas. It is not fair to single out any particular root cause; they all contributed in one way or another.

What have we done and what are we doing to address these issues? In 2006, the Orthodox Church in America began, in a sense, its journey of financial repentance. It took out a loan with Honesdale National bank in the amount of \$1,700,000 and over the course of the past two years the following has been accomplished:

- Repaid all of its major creditors, including debts related to the 14<sup>th</sup> All-American Council
- Paid off all legal expenses to the Proskauer Rose law firm
- Replenished the restricted checking accounts for all formerly depleted temporarily restricted funds
- Revised the budget and staffing of the Central Administration in order to adequately match the income of the Church with its expenses
- Engaged a new certified public accounting firm, that is completely unrelated to the history of the Orthodox Church in America, to audit the books and records of the Church
- Removed all previous accounting staff from the Central Administration and hired both a Treasurer and a Controller with significant financial experience

Since the time that the Central Administration staff changed, it should be noted that for the last year and a half the Orthodox Church in America has actually operated with a *surplus*.

In 2006 and into 2007, a task force was established to recruit and retain individuals with appropriate qualified skills and credentials in the key areas of the Central Administration,

namely a Chancellor, a Treasurer, a Secretary, and a Director of Ministries and Communications. Additionally, this task force along with the assistance of other members of the Metropolitan Council formulated a document called Best Practices to help to ensure that the Orthodox Church in America meet reasonable and appropriate standards of performance. It is important to note that none of the four positions mentioned above is vested with any more authority than the other.

In 2007, the task force, the chair of the finance committee of the Metropolitan Council, the Metropolitan Council and the Holy Synod approved a revised budget that reviewed every position at the chancery and reduced the expenses by more than half in some areas.

In the fall of 2007, I was hired as the new Treasurer and we began to address the issues of internal control, staffing, and communication with the Metropolitan Council and the Holy Synod. We began by examining and properly segregating restricted funds into separate bank accounts. The process of pre-signing a number of checks was discontinued. Procedures for submitting requests for expense reimbursements and reconciling deposits was implemented. The advanced accounting software program, Financial Edge, was discontinued and QuickBooks for Not-for-Profits was installed and implemented. A search was done for a new outside auditing firm to replace Lamos, Lambrides, Moulthorp, LLC and resulted in the hiring of Weiser, LLP. A search for a competent Controller was begun that resulted in the hiring of the Very Reverend Dennis Swencki in July, 2008. Additionally, all the receipts and disbursements for the year 2007 were completely reconstructed and reviewed in order for them to be audited by the Weiser, LLP accounting firm.

To better understand what has happened over the past few years from a financial perspective, I have included a condensed Statement of Activities. For the years 2005 and 2006, the figures were those completed by Lamos, Lambrides, Moulthorp, LLC. The figures for 2007 and 2008 were those compiled by me. As of the time that this report was being completed, I did not have the final audited and adjusted Statement of Activities from Weiser, LLP. It is my understanding that the gain on the sale of the Martin Drive residence will be reduced and the legal fees will be increased by \$20,000. Nonetheless, even if the gain was completely eliminated and operating expenses were increased by \$20,000 to account for the Weiser adjustment, the fact is that the Central Administration has finally successfully managed to operate at a surplus for the first time in several years.

This condensed Statement of Activities is not meant to be a comprehensive report on all activities. A complete report will be provided once Weiser, LLP has completed its audit of the books and records for the year 2007. In the report below all of the Unrestricted, Temporarily Restricted and Permanently Restricted net assets have been combined into one column. I have included it here in this fashion to point out that:

- Diocesan assessments have actually *declined* from 2006 to 2008 (\$2.6 million in 2006 vs. \$2.55 million in 2008)<sup>1</sup>

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<sup>1</sup> The 2008 figure is derived by annualizing the figure of \$1,273,865 as of June 30, 2008

- The budgeted revenue for the 14<sup>th</sup> All American Council was \$497,686 vs. the budget for the 15<sup>th</sup> All American Council of \$210,160
- Fellowship of Orthodox Stewards contributions have gone from \$255,082 in 2005 to \$127,625 in 2007 and only \$10,694 was received through the first six months of 2008
- The sum of Charities, Ministries, Seminaries, Theological Education and General Contributions has gone from \$544,266 in 2005 to \$306,063 in 2007 and only \$94,058 through the first six months of 2008.

Despite these tremendous declines in giving, the Central Administration still managed to:

- Cut General Administration expenses from \$1,898,676 in 2005 to \$1,592,489 in 2007 (a 16% decline), and
- Cut development expenses from \$136,388 in 2005 to \$107,039 in 2007 and practically eliminate the expense in 2008.

From an operational perspective, the line *Changes in net assets from operations* is the most informative. Understanding that some of the information above is not the entire story, that the years 2005 and 2006 may not have all of the expenses recorded and that adjustments will be made by the auditors for 2007, we can still make some observations. Throughout the years 2002 to 2006, the Orthodox Church in America ran with deficits. Beginning in 2007 we finally operated in the black and continue to do so.

It is imperative for everyone to understand that a substantial part of the financial scandal of the Orthodox Church in America is directly attributable to the fact that it ran with deficits for so many years. When bills came due and there was no other way to pay for the expenditures, some individuals, seeking to do the right thing, took money from restricted contributions to pay for operating expenses. If the Orthodox Church in America does not continue to live within its means it will return to some of these same problems.

**Condensed Statement of Activities**

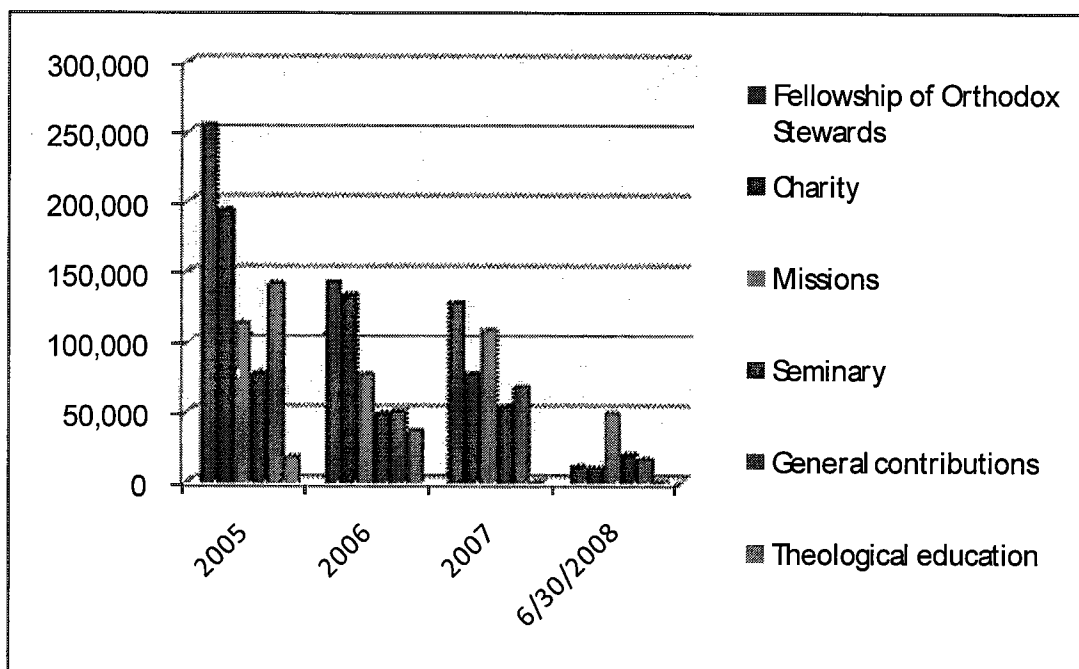
	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>6/30/2008</u>
<b>Income</b>				
Diocesan Assessments	2,272,161	2,673,712	2,626,454	1,273,865
All-American Council	497,686	0	0	210,160
Publications	82,349	72,807	3,730	4,397
Fellowship of Orthodox Stewards	255,082	142,672	127,625	10,694
St. Catherine's church	115,496	0	0	0
Charity	193,972	133,562	76,922	9,867
Missions	113,554	76,505	108,086	48,679
Seminary	77,638	48,437	53,525	19,387
General contributions	141,640	50,116	67,531	16,125
Theological education	17,462	36,365	0	0
Yearbook & calendar	16,960	1,573	1,855	0
Misc. other	51,480	59,568	7,799	3,496
Gain on sale of residence	0	0	384,496	0
Total contributions	<u>3,835,480</u>	<u>3,295,317</u>	<u>3,458,022</u>	<u>1,596,670</u>
<b>Expenses</b>				
Programs and ministries	1,379,597	1,271,494	1,235,553	574,511
General Administration	1,898,676	1,970,034	1,592,489	808,394
All-American Council	465,847	0	0	0
Development	136,388	218,434	107,039	(2,842)
Total expenses	<u>3,880,508</u>	<u>3,459,962</u>	<u>2,935,082</u>	<u>1,380,063</u>
Changes in net assets from operations	(45,028)	(164,645)	522,940	216,607
<b>Other Changes</b>				
Interest and dividend income	23,233	181,764	88,179	35,770
Realized and unrealized gains and (losses)	(88,725)	43,824	6,817	(238,833)
Distributions	0	0	(14,775)	(43,446)
Total other changes	<u>(65,492)</u>	<u>225,588</u>	<u>80,221</u>	<u>(246,509)</u>
Change in net assets	<u>(110,520)</u>	<u>60,943</u>	<u>603,161</u>	<u>(29,902)</u>
Audit adjustments			(261,501)	
Beginning net assets	<u>1,852,655</u>	<u>1,923,210</u>	<u>1,984,153</u>	<u>2,325,813</u>
Ending net assets	<u>1,742,135</u>	<u>1,984,153</u>	<u>2,325,813</u>	<u>2,295,911</u>

Following is a condensed statement of cash flows which further illustrates how bad the deficit spending had become and how we have improved our overall cash position in the last year and a half:

## Condensed Statement of Cash Flows

	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>6/30/2008</u>
Change in net assets	(110,520)	60,943	341,660	(29,902)
Adjustments to reconcile change in net assets to net cash used by operating activities:	(44,293)	(451,283)	(158,738)	226,711
Net cash provided/(used) by operating activities	(154,813)	(390,340)	182,922	196,809
Net cash from/(used by) investing activities	84,310	(61,921)	446,273	(12,720)
Net cash provided by/(used by) financing activities	126,807	1,037,609	(630,137)	(56,072)
Net increase/(decrease) in cash	56,304	585,348	(941)	128,017
Cash and cash equivalents, beginning	38,985	95,289	680,637	679,696
Cash and cash equivalents, ending	95,289	680,637	679,696	807,713

In my March 2008 report to the Holy Synod and the Metropolitan Council, I stated that the best way to describe the Orthodox Church in America at the present time is *fragile*. As the following graph of contributions shows, no one should delude themselves into thinking that the financial crisis has not had very serious effects on the Church's ability to carry out its Orthodox Christian mandates. The challenge now is to restore trust and credibility. There are many in the Orthodox Church in America that have become jaded and cynical. They have lost all faith that we know what we are doing, that there are safeguards to ensure that their money will be used appropriately, and that their money is being used wisely.



We have taken a number of steps to ensure that contributions received by the Central Administration go for their intended purposes:

1. We have hired staff with core competencies in finance and accounting
2. Job duties and responsibilities have been redesigned in order *not* to have the same consolidation of power and influence that existed previously
3. A new certified public accounting firm with no prior history to the Orthodox Church in America was chosen to examine the books and records of the Church
4. Separate bank accounts were established to ensure proper segregation of contributions
5. A new accounting software program, QuickBooks Professional, was implemented in 2007 as an interim step in order to move completely away from the prior database system. The final step will be to migrate to Blackbaud Accounting Software in 2009
6. A number of policies and procedures regarding check signatories, segregation of duties, and other internal control measures have been implemented
7. We are actively distributing as many of the contributions as we can and working with the charity committee
8. We are actively working with the audit and finance committees of the Orthodox Church in America to ensure that they are engaged with the central administration and are able to carry out their duties and responsibilities
9. We have eliminated all credit cards, with the exception of a gasoline credit card (the use of which is strictly controlled and documented), and all discretionary accounts
10. We have been working with the members of the Metropolitan Council to address any of their issues and concerns regarding the finances of the Central Administration.

This is not to say that everything is fixed or that we have accomplished everything that we set out to do. Here are some of the significant challenges that we still need to work on:

- Accounting matters
- Legal matters
- Timely and accurate financial reporting
- Implement the Blackbaud accounting software

- Resurrection of the Fellowship of Orthodox Stewards
- Develop and implement a budget for the next triennium
- Move the current investment portfolio and develop an investment strategy that is reasonable and verifiable
- Examination and reconstruction of the permanently restricted net assets

## Accounting matters

The single biggest issue at hand is the proper and complete examination of donations and expenditures of restricted contributions. Because the books and records were not kept in a manner that can be relied upon, it is quite possible that the outside auditors may qualify their audit opinions for many years to come. We simply can not determine with any true accuracy what contributions came in for restricted purposes nor can we at this point determine exactly who gave certain contributions and what the contributions were actually for. In some cases, there is simply a name associated with a particular fund. It is going to take a significant number of man-hours to reconstruct as much of this information as we can.

Another issue that must be addressed is the relationship of the stavropegial institutions to the Orthodox Church in America. In most cases, the stavropegial institutions are incorporated under separate tax identification numbers and have separate boards of trustees. However, as a matter of canon law these institutions are under the omophorion of the Metropolitan. As such there are still unresolved legal and accounting issues that must be examined.

Over the past year the Central Administration examined the relationship of the Orthodox Church in America's pension plan to the Orthodox Church in America. The attorney for the pension plan was consulted as was the pension department of Weiser, LLP. It was resolved by both the Central Administration and the Pension Board, that the pension plan is a stand-alone entity and that it is separate and distinct from the rest of the Orthodox Church in America. This is a very good example of the type of examination that should occur with the stavropegial institutions. Competent outside individuals must be consulted in order to help resolve these critical issues.

## Legal matters

There are a number of pending legal matters that must be addressed in such a way that we do not bankrupt ourselves with a blind desire for vengeance or restitution. The Orthodox Church in America's current funding mechanism is based upon diocesan assessments and a budget. There is no other well of money to tap into. In 2006 we spent over \$300,000, in 2007 we spent over \$120,000 and in 2008 we will have spent close to \$150,000 in legal fees. All told, this adds up to over \$500,000. Some in our Church have advocated *justice at any cost*. I believe that I have a moral and fiduciary obligation to remind everyone that every dollar spent pursuing some of these matters is a dollar that did not go to feed the

hungry, to clothe the naked, to visit the sick or to go forth and proclaim the Good News of Jesus Christ.

One legal matter that I would like to address specifically is the subject of “excess benefits.” The term *excess benefits* is used by the Internal Revenue Service to describe the unjust enrichment of employer-paid benefits. Examples of these could be all-expense paid vacations, gifts, free loans, forgiven debts such as personal loans or charges on credit cards, and free use of employer-paid housing. It has been suggested over the past couple of years that some members of the prior administration received many of the benefits just mentioned. However, the documented proof of this is lacking in some cases. Members of the Central Administration have been in contact with several attorneys and certified public accountants to try to address this issue. We are continuing to work on this and many other legal matters and they simply take time to work their way through the system. I assure you that this issue in particular has not been forgotten.

## **Timely and accurate financial reporting**

The staff of the Central Administration is acutely aware of the fact that we have not as yet been able to provide accurate financial records on a timely basis. We have been hampered by distance, computer connections, and other pressing matters, such as preparation for the All American Council. Nonetheless, please be assured that we understand our mission of timely and accurate monthly reports.

## **Implementation of Blackbaud accounting software**

The purchase of Blackbaud accounting software has been widely communicated. The decision to go forward with QuickBooks instead of Blackbaud was because of the pressing issues related to quickly establishing an accounting system that the staff understood, that could be implemented quickly and that was not cost prohibitive. Without a doubt, the Blackbaud accounting software program is a vastly superior system to QuickBooks. However, the level of accounting knowledge to utilize the software is significantly different than QuickBooks. The initial implementation of Blackbaud was done by a non-accountant and a significant number of mistakes were made. Given that we needed to complete the books and records in a manner that could be audited, we put the Blackbaud software on the shelf and went to QuickBooks in December 2007. Our accounting has finally stabilized and we are now at a point where we can begin transitioning to Blackbaud effective January 1, 2009.

## **Fellowship of Orthodox Stewards**

The Fellowship of Orthodox Stewards is one of the most important programs in the Orthodox Church in America. It is one of the few programs where we can teach about the importance of stewardship. If we are honest, we must admit that there are many in



the Orthodox Church that do not see the importance of stewardship. It comes much easier to some than to others and as the graph of contributions above shows, it is also easily lost. If we can live within our means, the true vision of the Fellowship of Orthodox Stewards can be realized, namely all of the money collected will go towards ministries.

## Budget for the next triennium

At the last meeting of the Metropolitan Council in September 2008, I presented the following four scenarios: (1) an absolute minimum budget that resulted in \$35.74 per head, (2) a budget based on the proposal of \$50 per head, (3) a possible budget of \$84.48 per head that would essentially keep things as they are but takes into account a number of the cuts already implemented by the Central administration, and (4) a new budget of \$102.58 per head based on the existing system.

During the meeting of the Metropolitan Council, several suggestions and concerns were expressed:

- The new budget must have tangible outcomes/deliverables, particularly in the case of departmental ministries;
- The amount allocated to ecumenical affairs was too high;
- Amounts not used by the Central Administration should be returned to the respective dioceses;
- Only the most essential items should be funded and more money should be left at the diocesan level.

It is important not to lose sight of the past and to realize that there has been a budget crisis for nearly the last 20 years in the Orthodox Church in America. As a reminder, following is a quotation from one of the former Treasurers:

“The Orthodox Church in America central administration and program budgets have been insufficiently funded for years – almost *never* adequately funded. This has led to a difficult existence, as we risk deficits due to lack of adequate income.”

I understand that the representatives to the All-American Council are charged with setting the assessment level for the next triennium and it is the Holy Synod and the Metropolitan Council that will establish and approve a budget based upon the assessment amounts. As Treasurer for the Orthodox Church in America, it is my recommendation that the current system be frozen for at least one more year to allow for a more serious examination of this very important issue for the following reasons:

1. While it appears at this moment that we can make a modest cut in the assessment, we simply can not predict what the ultimate price tag is going to be for legal and accounting matters and quite frankly it leaves no room for contingencies.

2. The current assessment level is actually working. We have weathered an unbelievable storm and are beginning to make progress. We are paying all of our bills and will actually be in a position to start increasing funding for all of the ministries of the church.
3. A serious cutback in the assessment level will undo almost all of the progress we have made in the past two years. We have a duty and responsibility to see that every penny that was given by the faithful of the Orthodox Church in America is accounted for and restored. We simply can't do this if there is a severe cutback in the diocesan assessments.

## **Movement of the current investment portfolio and development of an actual investment strategy**

One of the biggest disappointments over the past couple of years has been the financial performance of the investment portfolio. We have over \$2.5 million in investments and yet we have no bona fide investment strategy. In 2006, the investment portfolio was moved from Smith Barney to Wachovia Securities. While some of the investments have done well, most have experienced very severe losses. Part of the reason for the losses is unfortunately related to the fact that the advisors from Wachovia Securities have moved very aggressively in and out of a number of investments. Some have been held for periods of less than 60 days. We considered several options and finally decided to move the investments to Honesdale National Bank for several reasons: (1) we already have a positive banking relationship with them, (2) we are a big customer to Honesdale Bank, (3) the bank has what is now considered an *old fashioned trust department*, (4) we will be able to set an investment strategy with the bank that is reasonable, conservative and is not dependent upon how many buys and sells are performed in a month.

The Archpriest Dennis Swencki, Controller, has a considerable amount of experience in the investment field. Both Fr. Dennis and I examined the financial reports of Honesdale National Bank and met with the senior management of the bank. We believe that this is a prudent move and it is supported by the investment committee of the Metropolitan Council. We are now in the midst of moving the securities and we anticipate that this will be completed within the next 60 days.

## **Reconstruction of the Permanently Restricted Net Assets**

The Central Administration has suffered from staff turnover and a collective loss of corporate memory. For well over the past 50 years, individuals have made contributions to the OCA that were permanent in nature. Following is a list of those funds according to the records of The Archpriest Stavros Strikis as of June 30, 2007:

**Fund Balances (Cost Value) as at 6/30/2007**

	<b>FUND BALANCE</b>	<b>DONATED PRINCIPAL</b>	<b>(+/-)</b>
<b>A. ENDOWMENT FUNDS (Unrestricted Earnings)</b>			
Joseph P. Chwan	\$11,572.47	\$5,695.58	\$5,876.89
Suzanne Hubiak	5,417.21	3,054.00	2,363.21
John Tarkov	11,120.32	5,000.00	6,120.32
William Macko	32,133.69	15,000.00	17,133.69
Olga Stammer	2,063.62	1,000.00	1,063.62
Anonymous (Ralich)	1,031.99	500.00	531.99
Paul Fekula	2,111.94	1,000.00	1,111.94
Bilous	123,999.26	63,205.55	60,793.71
Vladimir Sakovich	3,993.69	2,000.00	1,993.69
Eftihia Colman	1,984.28	1,000.00	984.28
Rozalia Kiselica	1,984.28	1,000.00	984.28
Fr. Thomas H. D. Brown	18,831.41	10,020.00	8,811.41
Evdokiya Ivanovna Bruhanova	107,905.75	63,030.36	44,875.39
James Karabin	18,084.64	10,000.00	8,084.64
Gregory & Mary Stefanick	41,772.36	28,256.43	13,515.93
Tkacz Memorial	18,595.33	13,860.00	4,735.33
Antonia Rotko	132,206.16	132,206.16	0.00
Lydia Kavalenko	9,164.99	9,164.99	0.00
Andrew & Blanche York	82,475.51	82,475.51	0.00
FOS Endowment	116,748.56	107,245.55	9,503.01
<b>Subtotal</b>	<b>\$743,197.46</b>	<b>\$554,714.13</b>	<b>\$188,483.33</b>
<b>B. ENDOWMENT FUNDS (Restricted Earnings)</b>			
Theodore Dran	\$33,598.69	\$25,000.00	\$8,598.69
Frank Dellerman	4,229.58	1,100.00	3,129.58
Anonymous (Rex)	9,326.87	5,000.00	4,326.87
St. Andrew	155,494.62	150,000.00	5,494.62
Alex & Sara Kharitonoff	51,147.39	21,621.38	29,526.01
Anonymous (Ralich)	1,935.39	500.00	1,435.39
Irene Repaske	2,540.36	2,000.00	540.36
Zerr Memorial	17,462.41	15,000.00	2,462.41
Stephen & Anna Kudrick	22,176.05	18,142.99	4,033.06
Miscellaneous Missions	2,202.03	1,830.00	372.03
Joseph & Anna Fekula	12,861.64	5,688.43	7,173.21
St. Michael	37,998.94	13,931.00	24,067.94
John & Mary Chupinsky Clergy Care	25,524.31	23,919.76	1,604.55
Fr. John Skvir	42,002.70	29,828.04	12,174.66
Metropolitan Theodosius Scholarship	50,281.90	19,461.62	30,820.28
Pavel Savich	139,749.42	70,444.06	69,305.36
Helen Holowasko	3,722.24	1,479.20	2,243.04
Gregory & Mary Stefanick	94,968.67	56,512.50	38,456.17
Susanne & Sylvia Liebenthal	12,515.81	7,300.00	3,476.57
John & Anna Livosky	41,528.23	38,317.94	3,210.29
Andrew & Blanche York	329,902.02	329,902.02	0.00
Stephen & Mildred Karas	23,490.43	16,798.20	6,692.23
John & Mary Chupinsky Charity	26,096.78	23,919.76	2,177.02
Youth Ministries Publications	74,463.73	43,361.25	31,102.48
<b>Subtotal</b>	<b>\$1,215,220.21</b>	<b>\$921,058.15</b>	<b>\$294,162.06</b>
<b>TOTAL ENDOWMENTS</b>	<b>\$1,958,417.67</b>	<b>\$1,475,772.28</b>	<b>\$482,645.39</b>
<b>C. UNRESTRICTED DESIGNATED FUND</b>			
Custody Legacy Fund	\$233,265.60	\$233,265.60	0.00
<b>D. LIFE INCOME FUNDS*</b>			
John I. McGuire (Archives Fund)	163,334.73	163,334.73	0.00
<b>Subtotal</b>	<b>\$163,334.73</b>	<b>\$163,334.73</b>	<b>0.00</b>
<b>TOTAL ALL FUNDS</b>	<b>\$2,355,018.00</b>	<b>\$1,872,372.61</b>	<b>\$482,645.39</b>

To the best of our knowledge, this represents the world of all of the restricted funds; however, we do not have all of the original documents to support these amounts. To date, we have identified approximately 50% of the necessary supporting documentation, which is why we have not provided this information in any of the other reports. I have presented this schedule here to make it clear that we are not sweeping this issue under the rug but giving you at least a taste of the remaining accounting issues. In order for us to remove the qualification on the annual audit report, we will need to reconcile each and every fund listed back to their original source documents.

## Conclusion

I would like to thank my brothers in Christ at the Chancery for their tremendous hard work, dedication and love. To say that we have been on a journey together is no understatement. We have worked very hard together and I am very proud to be part of such an exceptional team.

Finally, I would like to say that the Church is not all about money. It is about finding our life through Jesus Christ. If Christ is not at the center of what we are doing, we have nothing. All that I said so far is important but it is nothing if we do not find Christ at the end of the journey.

I leave you with the words from the final stichera for Vespers of St. John Climacus:

*“Love God, and you shall find eternal grace, Set nothing higher than His love, that when He comes in glory, you may find rest with all the saints.”*

**Note: A complete copy of the 2007 Financial Statements and the Six Month 2008 Financial Statements can be found in the Financial Report book. The Metropolitan Council and Chancery staff are still completing the 2009 Assessment Considerations. In addition, the Audit Report from Weiser, LLP was not completed at the time of the release of this report but will be completed in time for the All-American Council. These will be posted online when completed and copies will be available at the All-American Council.**

# Job Description for Director of Ministries and Communications

## Supervisory and Job Controls

The Metropolitan assigns areas of responsibilities and scope of decision-making but relies on the Director to proceed autonomously on day-to-day activities. The Director keeps the Metropolitan well informed of sensitive issues as they arise and briefs him frequently on overall results. The Director is accountable to the Metropolitan for effectiveness of operations and success in achieving objectives. The Director is aware of and complies with the Best Practices and Policies for Financial Accountability of the OCA.

## Major Duties

1. Serves as coordinator of centralized Church communications, humanitarian and related activities, and of related OCA Departments and Ministries. Leads or directs staff in the following areas.
  - Humanitarian programs, projects, and facilities.
  - Supporting and/or guiding and directing the work of assigned OCA Departments, Offices, and Committees: Department of Christian Education, Department of Christian Witness and Service, Office of Communications, Department of Evangelization, Department of Liturgical Music and Translations, Office of External Affairs and Interchurch Relations, and Department of Youth, Young Adult and Campus Ministries. Assists in development of Departmental goals including budget proposals, monitors/oversees Departmental progress against goals including financial stewardship, provides support and direction when necessary, assures appropriate coordination, ensures appropriate reporting to OCA Councils, Synods and membership and resolves problems that transcend individual organizations' scopes.
  - Publishing *The Orthodox Church* and related issuances.
  - Managing the OCA website.
  - Maintaining relationships with print and other media; issuing media press releases.
2. Supervises a small staff engaged in day-to-day ministries and communications activities. Assigns work, reviews work products, evaluates performance, and resolves administrative and technical problems presented by employees.

*Performs Other Duties as Assigned*

# **Report of the Director of Ministries and Communications Archpriest Andrew Jarmus**

## **Introduction**

The Director of Ministries and Communications is responsible for coordinating and supporting the ministries under the auspices of the central Church administration and for the central administration's various communications media. This position was created in response to a perceived need for a presence within the OCA's central administrative structure that would coordinate Church ministries and communications in a systematic and deliberate way. At the time of the All-American Council, I will have been functioning in this position for just over 14 months. Much of my initial work as Director involved the typical learning curve associated with beginning a new position. Added to that, however, were the challenges of the financial scandal and leadership crisis in which the Church found itself at that time and -- God willing -- out of which we are now emerging.

Although the name of this position places ministries first, since beginning this work, I have found that needs related to communications have far outweighed those related to ministries, simply by virtue of their volume and the ongoing desire for effective communication both within and beyond the Church's membership. This has resulted in some tension at times between me as director of ministries and some of the ministry department heads under my supervision, as I respond to the demands of issues related to communications and the day-to-day operations at the Chancery before the needs of departments. Related to this was the fact that for most of the past year, the positions on the administrative team had not been filled and the work of the four officers was spread between the others. It is my hope that as we see life within our Church begin to normalize, sooner rather than later I pray, that this stability will, among many other things, allow for a more balanced approach to the demands of both facets of the Director's position.

## **Church Ministries**

One of my priorities concerning ministry departments is to keep regular contact with department chairs, either by email or telephone, and whenever possible, in-person. I was able to take part in a Christian Education workshop in the spring of 2007 and the ministries conference cosponsored by the Departments of Christian Witness and Service and Pastoral Life and Ministry later that summer. I have been able to advocate for the specific concerns and interests of departments at the Chancery and I have assisted departments in finding people with specialized skills to assist them in their work. One change that I implemented at the beginning of this year was the streamlining of

departmental communications, identifying one appointed chair as the person responsible for interaction between the department and the chancery.

The impact of the recent crisis on Church ministries cannot be overstated. Since the 14th All-American Council, the chairs of our Church ministry departments found themselves progressively more limited in their ability to fulfill their mandates. This reached its most difficult point in the second half of 2007 when almost all ministry activity was frozen because of serious funding restrictions at that time. The situation began to improve at the beginning of 2008 when funding to ministries was restored. I hope that in the future we will see our ministries not only achieve the level of activity before the scandal, but far surpass that level, moving to the forefront of our Church's life and presence.

Ministry departments are a critical part of the central Church administrative structure. These ministries embody the very work that our Church has been planted to do. Each ministry (evangelization, education, pastoral formation, Christian service, etc.) plays its role in the well-being and growth of the Church and it cannot be said that any one area of ministry is more important than the others. In fact, the division of these ministries into the departments that we currently have is only one possible way of organizing ministry. Another significant project that was initiated was a review of our current ministry structure. Based on this review, I developed, in consultation with my colleagues on the administrative team, a proposed restructuring of ministries that would streamline ministry groups, reduce their administrative costs, and increase funding of operating initiatives. The whole restructuring paradigm aligned our ministry structure with our Lord's "*Great Commission*" to "*go and make disciples*" (Evangelization and Outreach), "*baptize them*" (Pastoral and Liturgical Ministry) and "*teach them*" (Christian Education and Youth Ministry). This proposed structure is currently "on-hold" pending the wider discussion of Church life and strategic planning that is being initiated at this Council. How ministry ultimately enters into this discussion, it is my hope that it will be result in bodies that are given priority in the life of the Church and will be funded accordingly.

It is my experience that the staff of our ministry departments are very capable and faithful people whose love for the Church is evident in the work that they do. I am particularly grateful to the department chairs for all of their dedicated, hard work. Even at the time when ministry funding was for all intents and purposes completely suspended, department chairs kept their ministries running to the degree possible. In the upcoming year, we will see two new department chairs begin working. Fr. Marcus Burch takes over for Fr. Eric G. Tosi as chair of the Department of Evangelization, and a new priest will take on the responsibility of chairing the Department of Pastoral Life and Ministry. We welcome Fr. Marcus and others and look forward to working with them on their respective ministries as they join our "veteran" chairs in this critical leadership role.

There has been much discussion questioning the need for centralized ministries, favoring instead all ministry to be based in the dioceses. While there is an obvious need and place for diocesan involvement in ministry, there are some areas which lend themselves to a centralized structure; for example, Church school resources, liturgical translations or

resources for clergy formation. A central body coordinating ministries would be responsible for ensuring that the OCA has adequate representation in work with other jurisdictions through organizations like OCF or OCEC. Furthermore, national coordination of any given ministry allows dioceses to have a network within which their responsible personnel working on that ministry at the diocesan level may network, supporting one another and sharing ideas and resources. This is especially important in situations when a particular diocese excels in a given ministry; their resources and experience can then be shared with others to help strengthen the whole body of the Church.

## Communications

As communications director, I am the member of the chancery administrative team responsible for issues related to "*The Orthodox Church*" magazine, the OCA.org web site and the Orthodox Christian Publication Center. Other administrative responsibilities include supporting and advising Church administrative bodies on communications and PR issues, liaising with Church institutions and diocesan chanceries on matters related to central Church communications and supervising communications and PR issues related to special events (e.g. the 15<sup>th</sup> AAC).

Previously, the chancery had two full-time staff members responsible for the various aspects of central administration communications. Working with them on a part-time basis was the managing editor of "*The Orthodox Church*" magazine, Archpriest John Matusiak. Currently, the work that was done by these three staff members are now the responsibility of the one full-time staff person at the Chancery (me). Fr. Matusiak continues his work as the Managing Editor of *The Orthodox Church* and Protodeacon Kirill Sokolov continues his work on a contract basis as our Webmaster. As a result of this reduction in staff, over and above specific administrative responsibilities associated with my work as a chancery administrator, I have also been involved in the following communications initiatives over the past 14 months, most of which are ongoing:

- Preparation of news releases for the OCA.org web site (including writing and proofing text) – typically 25 to 30 releases every month.
- Preparation of photo galleries for the OCA.org web site (selecting an average of 25 to 30 photos out of 300 to 500 typically taken at any given event, image editing, preparation of captions).
- Posting of news releases on the OCA.org web site.
- The publication of greetings, announcements, letters and other central administration communications.
- Photographing events at the OCA Chancery and in the area.
- Managing updates to the OCA.org web site (contact information, photos, etc.).



- Production of the 2008 and 2009 OCA Desk Calendar: collecting information, photos, updated directories; design and layout; arranging for printing, and supervising mailing.
- Production of 2008 OCA Sourcebook: design and layout, arranging for printing and supervising mailing.
- Supervising OCA appeal campaigns and special events: design and prepare letters, flyers, posters; arranging for printing, and supervise mail out of materials.
- Supervise maintenance of "*The Orthodox Church*" subscription data base.
- Emailing updates of Chancery activities to HS and MC and to a broader to communications contact list.
- Because of the technological nature of my communications work, I also assist Chancery staff with basic computer-related troubleshooting.

A project that I have just begun is creating electronic copies of the service booklet series published by the Orthodox Christian Publications Center. Currently, no electronic versions of these services exist (except the two that we have recently scanned at the Chancery; the baptism and marriage booklets). Creating electronic copies will allow for the correction of typographical errors as well as making it possible to revise the texts as deemed necessary (for example, something as simple as adding "Deacon" into the proper places in the services rather than all the clergy parts being labeled "Priest").

Among the various communications organs of the OCA, "*The Orthodox Church*" magazine has been a beacon for the OCA for many years. It is interesting to note that even through the darkest days of the scandal in recent years, "TOC" is the one thing related to "Syosset" that has not come under criticism. The success of "TOC" is due in a large part to hard work of its very gifted managing editor, Fr. John Matusiak. I am very grateful to Fr. John for all of his work with "*TOC*." Beyond this (which in itself is substantial), I am also grateful that he continues to take on the gargantuan task of responding to email questions sent in to the OCA.org web site. Not only am I impressed by his ability to handle the massive volume of questions, but I am also taken by the quality of his responses which are always well thought out and tactful even concerning the most sensitive matters. I also appreciate Fr. John's insights in the various issues and challenges regarding communications that have come up these past 14 months--his experience and expertise are most welcome resources for OCA Communications.

I am also very grateful to Protodeacon Kirill for all of his work with the OCA.org site. The management of a website -- maintenance, development, trouble-shooting -- is an example of something that goes on behind the scenes that no one is even aware is happening (unless or until it crashes). It is the work of Protodeacon Kirill that ensures that when someone types "*www.oca.org*" they actually get to a web page and that something coherent is there and safe to visit. Beyond his technical skills, however, I am

equally grateful to Protodeacon Kirill for his understanding of Church life and the issues that we face. Like Fr. Matusiak, his advice has been of great benefit many times and it is his background in the Church that makes him not only a skilled technician but someone for whom the OCA.org web site is a ministry.

The Internet is a critical communication tool for the Church. It allows information to be made available to a vast number of people across the globe in a swift and low cost way. The OCA.org web site provides our Church's primary presence on the World Wide Web. The OCA.org web site averages about 50 new postings per month including news items, photo galleries, articles and liturgical texts. The site receives approximately 500,000 "hits" every month.

Although information posted on the OCA.org web site relates to the central Church, diocesan communications staff are also welcome (and encouraged) to send photos and news items of significant events from their respective dioceses for posting. There is far more to the Church than just the central administration and its organizational structure (something which has been a key feature of the current web site's design). News items and photos from events in dioceses, deaneries, parishes and institutions give a much broader representation of the Church. For example, the success of the Sunday of Orthodoxy and Paschal photo galleries shows the value of posting news items from our various dioceses on the web site.

An important project that I have recently initiated with the OCA.org web site has been upgrading the computer code that drives it. This upgraded software allows us much better security and greater functionality. A key enhancement is the ability to post material on the site from any computer with Internet access. This development alone has helped to improve the timeliness of postings.

The upgrading of OCA.org software is the first in a two-step process of site redesign. Once key pages of the site are working on the new software, we will begin to redesign the layout of the site, beginning with the home page and the menu items for easier navigation. There is a wealth of information on OCA.org but it is not that easy to find much of it. The redesign will offer more intuitive menu items and allow people visiting the website to be able to find what they are looking for with minimal "digging" through link after link.

Another development for the OCA.org web site, as cited in the SIC report, will be adding more interactive features. Not only will information be posted on the site, but visitors will also have the opportunity to give their feedback through moderated forums. This will open a whole new level of communication for the web site, allowing for not only the presentation of information but also dialogue on what has been presented.

I intend to continue looking for ways to further enhance the communication ministry of our Church, especially through the Internet -- for example, the partnership OCA Communications has with Ancient Faith Radio at the 15th All-American Council.

The greatest improvement related to communications since I first started working at the chancery has been a cultural shift among the central administrative structures towards more open communications. When I began my work in the summer of 2007, it was as if the Chancery was in a communication "lock down." As the weeks and months progressed, things began to open up. By late 2007, when something significant would happen related to a committee, I would send a draft release to the chair for review and revision before posting on the website. By early 2008, they were sending releases to me for posting. This is still a work in progress but the changes have already been significant.

Having said this, it must be understood that there is a difference between official Church communications media and private media ventures. Nowhere is this more important than on Internet. The advent of the World Wide Web has allowed anyone with a computer and an internet connection to have a public forum for their ideas, concerns and causes. As I heard someone say recently, "It is a wiki world." The issue with wikis (and the internet in general), however, is that because of open accessibility, there is no guarantee that information posted is 100% accurate. In fact, most wikis will have a disclaimer of some sort stating this. A private web site has much more leeway to post items with editorial comments and inaccuracies (even if unintentional) than the official web site of an institution like a Church. If a Church web site were posting items on a regular and frequent basis that contained factual errors, editorial comments or the personal opinions of the site's administrator, the site's credibility would plummet.

An official communications medium of a Church has a high degree of accountability; in the case of OCA communications, there are usually multiple levels of accountability. For example, the most recent minutes of the Holy Synod and Metropolitan Council meetings in September of this year went through three levels of review before being posted on the OCA.org web site (in fact, certain parts went through four levels). Each level represents a time span of typically five to seven days to give those involved in the review process adequate time to do their work. Each level adds more time to the process and thus delays publication; however, without them the potential for error, confusion and embarrassment increases. Because the reputation of the Church is at stake (and in some cases there are also matters of liability to consider), my rule of thumb for publishing official Church communications is "measure seven times, cut once."

## **Conclusion**

Future initiatives include the possible aforementioned restructuring of Church ministries, examining potentials for partnering with one or both seminary publishing houses on OCA publications and working with other Orthodox media institutions to promote the life, vision and mission of the OCA in new ways and to wider circles. All of these are possibilities. Some of them will be considered within the context of a wider strategic plan for the Church. Others will be examined as part of an effort to seek an efficient and cost effective manner of tending to the daily operations of the central Church administration.

As I said earlier, in the discussion about the future of our Church, I do not believe that the notion of a strong central Church administration and strong dioceses are necessarily

mutually exclusive concepts. I believe that there is a necessary place for both strong diocesan structures that promote the Church's mission and vision in their localities and also a central administrative body that is responsible for nurturing, promoting, and when necessary defending the common "corporate" identity that every member of the Orthodox Church in America embraces regardless of their geographic location throughout the Church. The Holy Apostle Paul reminds us that one part of a body cannot say to another, *"I have no need for you."* We are *"members of one another"* and the importance of our respective roles, local and "national", would be noticed much more acutely in their absence.

Before closing, I would like to acknowledge those at the chancery through whom I experience in a first-hand way the challenges and joys embodied in St. Paul's teaching that we are truly "members of one another." The devotion, sacrifice and expertise of the chancery staff are exemplary. In particular, I am blessed to work so closely with the fine individuals who are my colleagues on the chancery's administrative team.

I am a relative newcomer to the Orthodox Church in America but I would like to say what a gift that I feel it is to be part of this Church. Since beginning working at the chancery 14 months ago, I have seen some of the most difficult days of my life. But just because a situation is difficult, does not mean that it cannot be unto our salvation. And I would rather be in the OCA, working through these hardships together with the rest of our brothers and sisters, working to build up Christ's Holy Church in North America, than I would want to be anywhere else. Every time I stand at an altar in an OCA temple, I thank God that He has blessed me to be a part of this Church.

