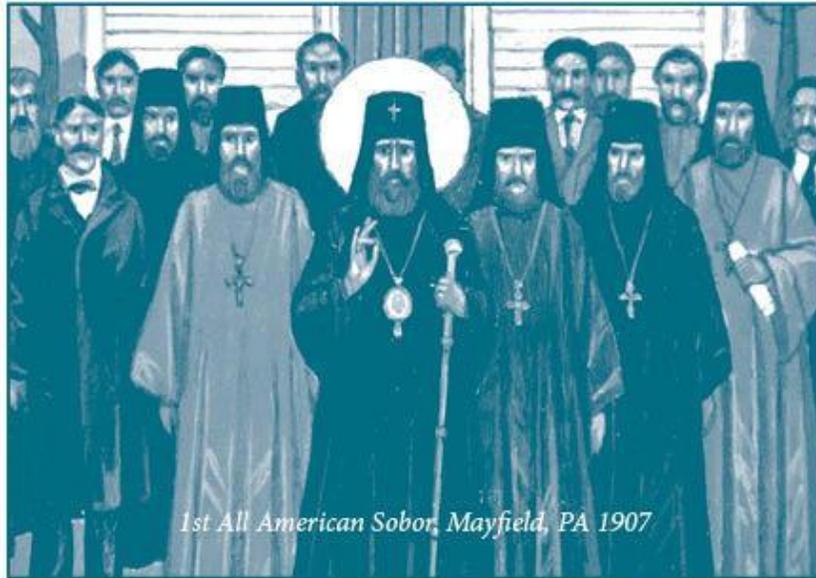


THE 18TH ALL AMERICAN COUNCIL



HOW TO EXPAND THE MISSION

JULY 20-24 2015 • ATLANTA, GA

OFFICERS' REPORT

*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 work of the Officers of The Orthodox Church in America for the 18th All-American Council to be held in Atlanta, Georgia from July 20 through July 24, 2015.

Contained in this report are the job descriptions and overview of the work of the Chancellor, Secretary, Treasurer and Director of External Affairs and Inter-Church Relations. The Chancellor's report will include a section on the work of the Sexual Misconduct Policy Advisory Committee which he has immediate oversight. The Secretary's report will contain a subsection on Archives and the Information Technology Team. The Treasurer's report contains specifics on the financial condition of the Church from both a historical and prospective standpoint. A full financial report of the Orthodox Church in America can be found in the Financial Report.

At the Council, each Officer will present a short oral report followed by questions/comments from the floor. The Treasurer will give a more detailed report on the finances of the Church at a dedicated Plenary Session. This report should be read in its entirety prior to the beginning of the Council.

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JOB DESCRIPTION OF THE CHANCELLOR

SUPERVISORY AND JOB CONTROLS

Is assigned areas of responsibility and scope of decision-making by the Metropolitan. Serves the Metropolitan as a trusted assistant and is accountable to the Metropolitan and Holy Synod 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 all 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, is responsible for the administrative oversight and day-to-day operations of the Chancery, and is the main liaison for communications of chancery activities to the Metropolitan, Holy Synod and Metropolitan Council.

1. Assists the Metropolitan in managing national-level clergy-related activities, including seminarian development and ordination, inter-jurisdictional transfers, continuing education, and retired clergy and widows' support. Works closely with the Church's hierarchs and seminaries to implement programs in the best interests of the Church, its dioceses, and individual members of the clergy. As required, reports progress, problems, and recommendations to the Metropolitan and Holy Synod, as well as to the OCA's Councils, Synods, and membership.
2. Oversees and/or guides the work of the Board of Theological Education and assigned OCA Departments, Committees, Boards, and Commissions. Assists in development of organizational goals and objectives including budget proposals; oversees progress against goals including financial stewardship; provides direction when necessary; ensures appropriate coordination among the various individuals and groups assigned him; ensures appropriate reporting to OCA Councils, Synods and membership; and resolves problems that transcend the scope of individual organizations.
3. As assigned, represents the Metropolitan and Holy Synod in religious, spiritual and administrative activities; acts in his/their 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 Chief of Staff for the Chancery.
5. Serves as a voting Member of the Metropolitan Council.

6. Oversees the Office of Review of Sexual Misconduct Allegations; continually communicates the activities of that Office to the Metropolitan and Holy Synod.
7. Serves as ex-officio member of the Boards of Trustees of St. Herman's, St. Tikhon's and St. Vladimir's Seminaries.

Performs other duties as assigned.

JOB REQUIREMENTS

1. Is a Priest in good standing in the OCA for a minimum of ten years, possessing excellent pastoral and administrative experience and skills, and recognized for living the precepts of the Gospel.
2. Is held in high respect by hierarchs, clergy and laity.
3. Demonstrates expertise in ecclesiology, canon law, and traditions.
4. Demonstrates familiarity with existing OCA Statute, procedures and policies.
5. Possesses a degree in theology and/or ministry, preferably from an Orthodox school of theology.
6. Is able to express ideas - and conclusions effectively and persuasively, both orally and in writing.
7. Must be willing to relocate to the proximity of the Chancery located on Long Island, New York.

REPORT OF THE CHANCELLOR

ARCHPRIEST JOHN JILLIONS

In North America especially, the Orthodox witness is offered within a dynamic society with universal interests. In such a society Orthodoxy is in a state of mission—and she cannot, certainly, be content with a museum-like preservation of the glorious Orthodox past of far away homelands. Something substantially new and important ought to arise...

--Archbishop Anastasios of Albania¹

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PART I: FOUR YEARS LATER

I.1 Where We Were: the OCA, Fall 2011

In the Fall of 2011, as I was preparing to start as Chancellor I spoke with a lot of people to assess what was going on in the OCA. Of course it was impossible not to be aware of the leadership crisis at the very top, given all that was being reported on the internet, but at the time I was still somewhat isolated from all that, teaching in Ottawa and on loan to the Greek Metropolis of Toronto and serving a tiny parish in Brockville, Ontario. So I spoke to almost all the bishops, many priests, lay leaders and Metropolitan Council members. And without exception—this is no

¹ Archbishop Anastasios, *Mission in Christ’s Way*, Brookline, MA/Geneva: Holy Cross/ World Council of Churches: 2010, 266-67.

exaggeration—everyone said it was a disaster. The meetings of the Holy Synod and Metropolitan Council were being dominated by this turmoil and the crisis had filtered down to trouble dioceses and parishes.

When I walked into the Chancery to be interviewed by the Holy Synod in October 2011, the heavy, grey air of hopelessness was impossible to miss. The leadership crisis was so severe that none of Holy Synod and MC members with whom I spoke could be reassuring. I was candidly advised to hold on to my university job and just take a leave of absence.

I.2 Where We Are: the OCA, Summer 2015

Almost four years later I can say that the life of the OCA is now on a path to a calm and healthy normality unimaginable in the fall of 2011, and we can turn our attention to the real work and mission of the Church. This could only have happened through God's grace working together with the insistent leadership and intervention of the Holy Synod, Metropolitan Tikhon, the Metropolitan Council, Chancery officers and staff, and clergy and lay leaders across the dioceses.

This sense of renewed peace is widespread throughout our dioceses. I've spoken to diocesan chancellors to get their perception and advice as to where we stand and how the Metropolitan's Office can help address the real needs of our dioceses and parishes. Here's a sampling of their reactions.

Things have significantly improved. We needed a time of peace and healing, the new metropolitan is good, there's good conciliarity among the Holy Synod and the bishops "play well together." Our focus is good too: evangelization, clergy health and the health of our institutions. The Mission School and Department of Pastoral Life and Ministry are significant accomplishments. We now have bishops in almost all dioceses. Diocesan revitalization is happening. And we're making progress on a new approach to finances.

We are definitely more stable and stronger. His Beatitude is a major factor. But the chancery as well. Given the limited staff, the responsiveness from the central church to diocesan concerns is excellent. This makes it a lot easier for me as a diocesan chancellor. The Holy Synod too is stronger from my perspective. I like what I've been hearing, and it's encouraging to know that the bishops are talking to each other.

The OCA is quieter, in a good way. There isn't as much disruption.

There's peace. The Church has settled down to do its real work. There's a sense of calm now. Like a ship starting out on a journey we need to have a time of relative calm to be prepared for future storms. His Beatitude and the chancery have made an effort to connect with the dioceses and this has been important. I get up in the morning and don't need to wonder what Central Administration is doing. When the Administration speaks they speak with one voice, and that's essential. All of this is such a contrast to the past years of troubles. If someone doesn't see this then they've been asleep.

Personally, after Metropolitan Tikhon's election at the special 17th AAC in Parma (November 2012) I felt an immediate turn-around in mood and a new sense of direction, hope and energy in the Holy Synod, Metropolitan Council and Chancery. As a result, and with assurances for the first time from Metropolitan Tikhon and the Holy Synod that stability had returned, I resigned from my professorship at Saint Paul University in Ottawa on January 1, 2013.

His Beatitude isn't basking quietly in this newfound OCA peace. On the contrary, he is looking at this as a God-given opportunity for the OCA to finally live its mission. Last year I was with Metropolitan Tikhon visiting a parish and during the Q and A session after the Liturgy a woman thanked him "for bringing peace back to our Church." He replied that this was not his doing, but in any case we can be grateful. He warned "Peace can also be a temptation not to work. God has given us this time of peace to *work* to build up the Church."

I.3 The View from the Dioceses

One of the most fruitful new forums for doing the work of the Church on an OCA-wide level—in addition to the Holy Synod and Metropolitan Council—are the meetings of diocesan chancellors and treasurers. These meetings have thus far mainly focused on finances—and this remains the major task—but they are also drawing His Beatitude and the officers closer to diocesan leaders to hammer out solutions to complicated practical issues.

The officers and I have also welcomed opportunities over the last four years to see with our own eyes the life of our dioceses and parishes. These personal, face-to-face contacts over time are what build and strengthen relationships on all levels and bind us to one another as members of the Orthodox Church in America.

The local situations of our dioceses vary tremendously when you consider that the OCA includes dioceses that serve Alaska, Canada, Mexico, Albanians, Bulgarians, Romanians and all the geographic dioceses of the United States, each with their own peculiarities. Differences in nationality, geography, history, culture, language and even weather play a major role and contribute to every diocese's sense of being "different" from all the others.

In general "the OCA" as an organizational entity is far away from the personal, family, and parish concerns that dominate most people's lives (even the diocese is off the radar for most parishioners.). And yet, time after time I have been struck by the resilience of commitment to the OCA's founding vision. Most of our clergy and lay leaders believe in an autocephalous Orthodox Church in and for North America, that is accessible to all and living the Orthodox faith in a compelling way that attracts others. And they believe that the way we have learned over time to bring bishops, clergy and laity together for building up of the Body of Christ is a gift to protect.

In my conversations with the diocesan chancellors over the last two years I've asked them about the OCA's strengths, weaknesses, opportunities and threats (see the Appendix). These men have decades of experience which helps ground them and us in reality, so I would urge you to carefully read and consider their candid and insightful views as we ask ourselves "How to Expand the Mission."

PART II: HOW TO EXPAND THE MISSION

II.1 Mission and The Institutional Church

For many people there's no bigger turn-off than the phrase "institutional church." Everybody seems to want spirituality without the trappings of religion and institutions. And perhaps those of us who are most embedded in religious institution are also its biggest critics: we see from the inside its failures and temptations. If you like church, don't ask how it's made.

In the 1950's we had battles over the separation of the parish's spiritual and "business" aims, with clergy taking care of what happens "upstairs" and the parish council overseeing the business "downstairs." Thankfully we've gotten past this and see the worship and business of the church as thoroughly intertwined. Orthodox Christianity looks at the material, visible and messy details of church life and sees a divine-human sacrament. The Church in all its institutional complexity is the way we live out our claim that God became material, visible flesh. God in Christ refused to remain at a safe distance and instead entered fully into the mess of human history. Rather than be embarrassed by the church as institution, we say that this institution—at its best—is a sacrament that can transform administration, overhead, infrastructures and business into life-giving vehicles of the Spirit. It's a high calling, and when we don't do it well, people can get spiritually sick and die.

I am a member of the OCA because I believe in our vision of an Orthodox Church in and for North America. As one of the chancellors told me, "We are not just aspiring to be an American Church, we *are* an American Church." But we are just at the beginning. We are a few grains of salt sprinkled over a vast continent where 400 million people are mainly entirely ignorant of Orthodox Christianity. Can we be a church that looks at its surrounding neighborhoods, sees the people who are there, welcomes them all and serves them in the name of Christ?

My simple dream is that every county would have at least one such parish. Right now, 90% of our counties do not. Also, surveys of our parishes show that mission and evangelism are way down on the list of parishioner interests, far displaced by the desire for beautiful, meaningful, joyful worship. That's the obvious place to begin, but for the future I hope we can inspire our people and parishes with the desire to look beyond the parish walls so others can share in this too.

As delegates to the All American Council we are all committed to governance and institution-building. Individually, we do this by working in a particular patch of the OCA. But together, with Metropolitan Tikhon and the Holy Synod, we have the task of looking beyond our parish, deanery, diocese, monastery or seminary and asking what we can do most effectively and efficiently to serve the mission of the Orthodox Church in America as a whole.

Identity and Administration

The first purpose of the OCA's administration is to foster a sense of mission, identity and connection among our parishes and dioceses as "The Orthodox Church in America." As

members of the OCA we share a vision about being Orthodox Christians *here*—in the US, Canada and Mexico. Whatever the specific pastoral needs of the people whom we serve—and many of them are immigrants or identify deeply with their immigrant backgrounds—as the OCA we have planted our roots *here*, we love the culture, people and history *here*. Indeed, unlike any other Orthodox Church in North America we have an entire diocese—Alaska—almost all of whose members are Native Americans.

Orthodoxy throughout its history distinguished itself by embracing local cultures, learning from them but also transforming them. Our mission in and for America is a central aspect of our identity as the Orthodox Church in America. We could name other features too: conciliarity (or *sobornost*), which is how our bishops, clergy and laity work together in hierarchical order and respectful deliberation and decision-making, as exemplified in our All American Councils. Our history of saints: martyrs, missionaries, pastors, teachers. Our pan-Orthodox, multicultural parishes. Our monasteries and seminaries. And most recently, our transparent approach to resolving the difficulties we face. All these help make us who we are as people who value membership in the Orthodox Church in America.

No diocese on its own can be “The Orthodox Church in America.” This is antithetical to the whole experience of the Ecumenical Councils, which insisted on the interconnection of patriarchs, metropolitans, bishops and their dioceses and on the need for coming together regularly even when it was difficult to do so. Sticking closely together in our OCA identity and with a strong central administration is all the more important when we are only about 100,000 souls scattered across fifty states and three countries.

Beyond forging and reinforcing a common identity and purpose, we need administration to work in the background to keep the machinery running. Communications, a website. Clergy assignments. Insurance. Pensions. Legal concerns. Meetings of bishops, clergy and laity and visits to other churches to build brotherhood in Christ, to take care of the good order of the Church as a whole and iron-out problems.

The cost of having an OCA

The Metropolitan’s Office has responsibility for overseeing the whole OCA, covering some 700 parishes in the United States, Canada and Mexico. It provides a central church administration for all fourteen dioceses, including the six dioceses which up to now have had a special arrangement for their contributions (Romanian, Bulgarian, Albanian, Canada, Mexico, Alaska). While the Metropolitan’s Office does support some direct forms of ministry through its departments, board and commissions, our main work and the bulk of our expense, not surprisingly, is *administration*.

What is a reasonable cost for having the Metropolitan’s Office as the OCA central administration? The Better Business Bureau advises that charities should be spending less than 35% on administration. As Melanie Ringa points out in her Treasurer’s report, **the cost of the Metropolitan’s Office is estimated at 2.7%**. This is based on the total central church administration budget compared with estimates of total parish income for the 700 or so communities of the OCA. Even if that estimate is doubled it’s still less than 6%.

While there is plenty of evidence that some of our parishes are hurting financially, especially in New England, Pennsylvania and the Midwest, and we need to address what can be done to help them, the cost of having the Metropolitan's Office is more than reasonable. Indeed, since 2006 the CCA budget has been cut by more than 40% and the staff has been cut by more than 60%. The Metropolitan Councils' Finance Committee has argued that we can't cut any more without seriously affecting the current work or transferring costs to the dioceses. Even some of the struggling diocesan councils with whom Melanie and I met over the last few months questioned whether the proposed financial resolution is adequate to fund the church without hurting the work and mission of the OCA.

II. 2 How to Expand the Mission: "Something substantially new" ?

For the last few months I've been reflecting on the Book of Acts in the *Chancellor's Diary*. The first century has much more in common with our religious environment in North America than with the times and places where Orthodox churches were/are in their ascendancy as powerful national religious institutions closely aligned with the cultures and the states of Greece, Russia, Romania and so forth. In these ethnic homelands of the national mother churches Orthodoxy is the dominant tradition known by all. Orthodoxy in those lands, with their ancient churches, icons, holy sites, monasteries, saints, thousands of clergy and hundreds of bishops represents the ancient, settled, completed, immovable patrimony of the Christian past which is to be delivered to the next generation as both a religious and national duty. This is totally unlike either the first century or the North American scene we face here now. For the first-century world of *Acts* Christianity was *new*, just as Orthodox Christianity is new for the 400 million or so people in North America.

This situation in North America presents us with tremendous opportunities that require us to be creative. As Archbishop Anastasios observed, "something substantially new and important ought to arise..."

And yet what's new may be discovered in the deepest parts of our Tradition. Father Edward Rommen (Holy Transfiguration Church, Morrisville, NC) is an adjunct professor at Duke University, where he teaches about mission. In his book, *Get Real: On Evangelism in the Late Modern World* he cites the 14th century revival of spiritual life in Russia. It began in monasteries but "triggered 'one of the most remarkable missionary movements in Christian history.'" He goes on to say,

*We need a new kind of Christian, willing to withdraw from the lies of the late modern context and quietly exemplify the new life in Christ. These would be people who realize that we cannot simply organize, market, manage or resource evangelism into being.*²

Without necessarily being monastic, this "new kind of Christian" takes his or her inspiration and training from the centuries of experience found in the monastic tradition. Such people "will

² Edward Rommen, *Get Real: On Evangelism in the Late Modern World*, William Carey: 2010, 200-201.

devote themselves to living the faith and confidently rely on the Spirit to draw and attract others, to establish the evangelistic contact with those already prepared by God himself.”

Evelyn Underhill, the great scholar of Christian spiritual life, gave similar advice on church renewal to the Archbishop of Canterbury in 1930.

I desire very humbly to suggest with bishops assembled at Lambeth that the greatest and most necessary work they could do at the present time for the spiritual renewal of the Anglican Church would be to call the clergy as a whole, solemnly and insistently to a greater interiority and cultivation of the personal life of prayer... [The] real failures, difficulties and weaknesses of the Church are spiritual and can only be remedied by spiritual effort and sacrifice, and that her deepest need is a renewal, first in the clergy and through them in the laity; of the great Christian tradition of the inner life... God is the interesting thing about religion, and people are hungry for God.³

The risks of opening the doors of the Church

The risk of opening the church’s doors to people “hungry for God” is that we never know who might come in. But Jesus welcomed everyone even when this offended the sensibilities of the pious.

And as he sat at table in the house, behold, many tax collectors and sinners came and sat down with Jesus and his disciples. And when the Pharisees saw this, they said to his disciples, “Why does your teacher eat with tax collectors and sinners?” But when he heard it, he said, “Those who are well have no need of a physician, but those who are sick. Go and learn what this means, ‘I desire mercy, and not sacrifice.’ For I came not to call the righteous, but sinners.”

(Mt 9:10-13)

God does not wait for human beings to be worthy, or even fully aware of all their sins. Part of the sickness He comes to heal is precisely this lack of awareness. Jesus Christ envisioned a Church that would bring everyone from the highways and byways, the poor, the sick, the lame and the maimed. Wounded people, all in need of healing. And we’re part of this mixed bag, all partaking of the Body and Blood of Christ “for the healing of soul and body.” Jesus also taught that this messy group would live and grow together like wheat and weeds until the end of the age when the Lord himself, in His time, will sort good from bad.

The biggest stumbling block we have in being a welcoming spiritual hospital is our tendency to judge others “before the time” (1 Cor 4:5.) To expand the mission and be open all, we will need to take risks and learn the humility taught in our monastic tradition.

³ Underhill, Evelyn (c. 1930), “A letter from Evelyn Underhill to Archbishop Lang of Canterbury.” Available from: <http://intotheexpectation.blogspot.com/2013/07/god-is-interesting-thing-about-religion.html>

A brother in Scetis committed a fault. A council was called to which abba Moses was invited, but he refused to go to it. Then the priest sent someone to him, saying, "Come, for everyone is waiting for you". So he got up and went. He took a leaking jug and filled it with water and carried it with him. The others came out to meet him and said, "What is this, father?" The old man said to them, "My sins run out behind me, and I do not see them, and today I am coming to judge the errors of another." When they heard that, they said no more to the brother but forgave him.

A brother sinned and the priest ordered him to go out of the church; abba Bessarion got up and went out with him, saying, "I, too, am a sinner."

PART III: THE CHANCELLOR AND THE METROPOLITAN'S OFFICE

III. 1 Summary of Chancellor's Activities

Serves as assistant and advisor to the Metropolitan of the Orthodox Church in America, is responsible for the administrative oversight and day-to-day operations of the Chancery, and is the main liaison for communications of chancery activities to the Metropolitan, Holy Synod and Metropolitan Council.

--from the Chancellor's job description

As the executive branch of the OCA, the overall task of the Metropolitan's Office is to run the Central Church Administration, facilitate the deliberations and decision-making of the Metropolitan, Holy Synod, All American Council and Metropolitan Council, and then to take whatever steps are necessary to put their decisions into action.

Over the last four years, I have been struck by how many hours and hours of face to face meetings, emails and phone calls are needed to review possible courses of action, avoid (or deal with) nasty surprises and misunderstandings, and to keep things running decently and in order. Most of what the administration does is not dramatic, but it takes the mundane efforts of right policies, procedures and inspired people to make peaceful church administration miraculously normal. St Paul includes "administrators" among those whom God has appointed for the building up of the Body of Christ (1 Cor 12:28). It's humble work but should not be denigrated or discounted. And those who do it need your prayers.

As chief of staff, I am expected to be aware of all the issues that might be affecting the OCA in order to appropriately assist and advise Metropolitan Tikhon, to represent him and the Holy Synod and to "maintain the organizational integrity and further growth of the Church," as the Chancellor's job description states. This makes every day extremely varied and requires a team approach with constant communication. As can be seen from their respective reports the Secretary (Fr Eric Tosi), Treasurer (Melanie Ringa) and Director of External Affairs (Fr Leonid Kishkovsky) have their own areas of extensive responsibility and authority. It should be obvious to all who have interacted with them or read their reports that they work with professionalism and deep Christian commitment. We depend on each other every day. While they report directly

to the Metropolitan, the Chancellor's role is to ensure a good flow of communication between them all. The Chancellor is also rector of St Sergius chapel which maintains a full liturgical schedule (celebration of liturgical services is shared with Fr Eric Tosi, Fr Basil Summer and—when he is available—His Beatitude.)

In this broad swath of activity much of the correspondence and conversation is confidential, but the list below will give you a sense of the range of areas I have been involved in. In addition, for the past three years I've been writing *The Chancellor's Diary* on average 3-4 times a week, giving brief reflections on the lectionary, Psalms and Acts, along with a few sentences about life at the chancery.

Administrative and advisory meetings with Metropolitan Tikhon, officers and staff

Representing or accompanying Met Tikhon on official visits

External affairs

Holy Synod meetings (Spring and fall)

Metropolitan Council meetings (Spring and Fall), and MC committees as assigned

Clergy matters: conversations and correspondence with Metropolitan, bishops, chancellors, deans, priests and deacons

Visits to dioceses (assemblies, deaneries, council meetings, clergy gatherings)

Meetings of Diocesan Chancellors and Treasurers

OCA Chancellor and Treasurer presentations to Dioceses on the Financial Resolution

Legal matters

Church courts

Pastoral Practice Committee (Assembly of Bishops)

Pastoral Life Department, chair

Theological Education (ex officio member of SHS, STS and SVS Boards; member of Board of Theological Education and the Diaconal Vocations Program)

Office for Review of Sexual Misconduct Allegations, Director

Sexual Misconduct Policy Advisory Committee, Chair

Meeting of Monastic Superiors

Archives Advisory Committee

Preconciliar Commission

Fellowship of Orthodox Christians in America (FOCA)

Russian Brotherhood Organization

Children's Home Board

Saints Cosmas and Damian Human Services, Inc

III.2 Progress Toward Goals 2011-2015

During this period there have been six major goals I've focused on as chancellor or shared as part of the Metropolitan's Office:

- ❖ Build Relationships
- ❖ Create a stable administration
- ❖ Overcome negativity

- ❖ Reduce OCA assessments, introduce proportional giving
- ❖ Address and prevent sexual misconduct
- ❖ Reestablish the Department of Pastoral Life and Ministry

Build Relationships

The primary goal from the start was to create a good, trusted working relationship with the Metropolitan, the Holy Synod, the Metropolitan Council, OCA officers and Chancery staff, Diocesan Chancellors, Seminary administrations, Dean of Military Chaplains and directors of the various OCA Departments and Commissions.

There is always room for improvement in the realm of relationships. But while this is a “soft” and somewhat intangible and elusive goal, in general there has been substantial progress in this area. In the first place, the Chancery officers and staff are a superb team. I am constantly impressed by how much they do to keep the administrative life of the OCA on track. I had a steep learning curve starting in 2011 and there have been bumps in the road, but we consult extensively with vigor and honesty, at times “agreeing to disagree” and above all aiming to “preserve the unity of the spirit in the bond of peace.”

Including the dioceses more in the work of the OCA as a whole is crucial and I am very pleased that diocesan leaders have been increasingly consulted in advising and decision-making. Eventually, I hope there will be a seamless connection between the work done in the Metropolitan’s Office and what happens on the diocesan level.

Create a stable administration

Much of the nuts-and-bolts work of the central church administration is reflected in Fr Eric Tosi’s report as OCA Secretary and Melanie Ringa’s report as Treasurer. The positive comments from the diocesan chancellors and treasurers about the current state of OCA administration can largely be attributed to Fr Eric’s and Melanie’s efforts and the excellent work of the Chancery staff. But all of this would be impossible without the calm, steady and good-humored presence and direction of Metropolitan Tikhon.

Overcome negativity

It takes time to rebuild trust, and again—based on what I’m hearing from the dioceses—there is a sense that we have turned a corner. But whatever was or is going on in the offices of the Chancery is only a tiny fraction of what church life is all about. While it’s a relief, of course, that the central church administration has made substantial progress over the last four years, throughout even the most difficult periods the OCA’s past decade bishops, priests and deacons continued to serve, the mysteries were celebrated, people were being tended to, and our faithful continued to pray and serve Christ and their neighbor in an inspiring variety of ways. Every one of our parishes has a “miracle story”: how the church came to be built, how people discovered the faith, why they stayed, prayers answered, unexpected grace in times of crisis, suffering and sorrow.

Reduce OCA assessments, introduce proportional giving

Melanie Ringa has spearheaded the effort with the Metropolitan Council, Holy Synod and Dioceses to keep working on an equitable plan that includes all the OCA's dioceses in sharing fairly in the funding of the OCA's administration. Assessments have been reduced over the last four years, and the current financial resolution—based on proportional giving—is the result of those efforts. But as noted above there are still questions about the wide differences between the dioceses in their approach to finances and their level of financial health. The Treasurer's report gives a detailed picture of all this.

Address and prevent sexual misconduct

A key aspect of the Chancellor's role is to oversee the Office for Review of Sexual Misconduct Allegations (ORSMA.) Almost immediately after being appointed as Chancellor it became clear to me that this was then the single most important goal that had to be addressed for the spiritual and administrative health of the Orthodox Church in America. It was incumbent upon the OCA to have a professional at the helm of these matters to pursue investigations, train Response Team members and to take whatever actions are needed to protect children and adults from abuse. The Holy Synod, the Sexual Misconduct Policy Advisory Committee (SMPAC), and the Metropolitan Council agreed and eventually Cindy Davis (now Heise), a professionally trained and experienced Social Worker was appointed as Coordinator of ORSMA with responsibility for its day-to-day running. As a result of her work and the extraordinary hours of assistance from our dedicated legal, investigative and mental health consultants and SMPAC members, we now have control over what was a potentially chaotic situation. This isn't to say there isn't much work still to be done, but most of our attention can now shift to prevention and training efforts.

The ORSMA and SMPAC reports are attached.

Reestablish the Department of Pastoral Life and Ministry

For a number of years the OCA's Department of Pastoral Life and Ministry was effectively dead. The website had long-outdated information, there was no episcopal moderator, no chair and no department members. Last year the Holy Synod appointed Archbishop Mark as episcopal moderator and now the department is being started up again with me as chair and Fr Nathan Preston as Administrator (Queens, NY, Albanian Archdiocese). Fr Nathan generally comes to the Chancery once a week (on Mondays) and even at this early stage his contribution has been tremendous. His Beatitude has identified this focus on clergy health as essential for carrying out the OCA's mission.

For the past several years, clergy sexual misconduct matters have occupied our attention and have yielded some positive response. But this has obscured an even deeper problem that needs our attention: the spiritual, emotional, physical and psychological health of our clergy.

A greater coordinated effort, involving the Holy Synod, our seminaries, our dioceses and our parishes and families, needs to be implemented in a positive effort of strengthening the health of

our clergy so that they can do the work of missions and evangelism, preaching and teaching, healing and comforting, that they are ordained to do.

On April 29th of this year we had a successful consultation with pastors appointed from almost all our dioceses to help set the department's direction and ensure that we will be working in tandem with diocesan leaders and the real needs of clergy and their families. The Department report and summary of the consultation are attached.

III.3 Major Achievements of Metropolitan's Office 2011-2015

Addressed leadership crisis preceding and following 16th AAC (Seattle)
Managed transition after resignation of former Metropolitan
Organized successful 17th AAC and election of Metropolitan Tikhon
Took steps to establish or re-establish good relations with Orthodox Churches
Initiated annual meetings of diocesan chancellors and treasurers
Established Statute Revision Task Force and process to update OCA Statutes
Reduced assessments from \$105 to \$90
Reduced annual expenses by \$457,000 (2011-2014)
Chancellor and Treasurer travelled to Dioceses to discuss Financial Resolution
Filled most episcopal vacancies
Established of ORSMA office with Coordinator (Cindy Heise) and consultants
Addressed episcopal and clergy misconduct
Revised and conducted training on misconduct *Policies, Standards and Procedures* (PSP)
Restructured legal services
Appointed Robert Koory as Special Legal Liaison for ORSMA and SMPAC
Brought legal costs down from \$257k to 24k.
Re-established Department of Pastoral Life and Ministry
Held consultation with diocesan leaders on Pastoral Life
Re-established stewardship program as "Stewards of the OCA"
Founded annual Mission School
Conducted extensive Metropolitan Council study of chancery work and organization
Initiated annual meeting of monastic superiors
Established Archives Advisory Committee
Re-invigorated Pension Plan membership (highest active membership since plan began)

III.4 Goals of Metropolitan's Office for 2015-2018

Establish long-term planning process by HS and MC for best use of all OCA resources
Ensure adequate funding for stable and effective OCA church administration, with possible addition of essential staff:

- p/t accountant
- f/t secretary for Metropolitan
- f/t development officer

Strengthen the Stewards of the OCA

Continue to address the three main areas identified by Metropolitan Tikhon:

- evangelization

- health of clergy and their families
- health of our seminaries and monasteries
 - Create internship and mentoring opportunities for new clergy
 - Develop plans for mentoring and training of potential episcopal candidates
 - Develop plans for External Affairs: succession, board of consultants, setting priorities
 - Continue to develop the annual Mission School
 - Develop OCA-wide initiatives for engaging youth
 - Continue to strengthen bond between the dioceses and the Metropolitan's Office
 - Continuing to build relations with other Orthodox Churches in North America and abroad

APPENDIX: SAMPLING OF VIEWS FROM OCA DIOCESAN CHANCELLORS THE OCA: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

As OCA Chancellor I've spoken with Diocesan Chancellors and asked them about the OCA's current strengths, weaknesses, opportunities and threats. Here are some of their comments as I wrote them down during our conversations.

STRENGTHS

Fullness of the Orthodox faith. Autocephalous. Open to all Americans. In English. Over half are converts, even among the bishops. Smaller parishes strengthen sense of family, community, pastoral interaction. Web page and communication. Youth camps. St Vladimir's and St Tikhon's seminaries and press have worldwide reach and influence. There is a rich American heritage going from the Alaska mission, St Herman, St Innocent all the way to Fr Alexander Schmemmann and Fr John Meyendorff. We are not just aspiring to be an American Church, we *are* an American Church.

The Metropolitan, especially with his visits to other churches, is an important connection between the OCA and the rest of world Orthodoxy (but this needs better communication.)

It's good that we are small and have many missions. We can be less worldly and attached to secular visions of a powerful church tied to overseas. There is strength in our weakness, it keeps us focused on the gospel and Christ. We have good clear documents, and can be a voice for the Orthodox faith in North America and the world. We don't have to try to be what we're not (as we did in "the recent unpleasantness") and succumb to the American (or simply human) temptation to live beyond our means. We have only Christ, and we're not competing for what Fr Thomas Hopko called the "P's of place, pride, prominence and position."

We are united by a common vision of a church in and for America, though we come from different backgrounds. We are at home here, not in exile from some mother country. This vision was the great gift of Metropolitan Leonty, Fr Alexander Hotovitsky and the others. They left us *the Church*. They gave us the framework and goals. History will judge *us* in 50 years, asking what *we* did. A big part of what we have done is to *come through* a turbulent period. And we did it in public. Our transparency makes us unique. Whether we're talking about finances, administration or misconduct, no other Orthodox church in the world does this, and can criticize itself and say "we've made mistakes but we're going to learn from this." This is our legacy and we continue it. To recognize our weaknesses is one of our strengths. As St Paul said, "When I am weak, then I am strong."

There's a creative tension between longing for the past while also having to redefine ourselves. How can we transform the present culture while still being faithful to the tradition? Our past leaders passed the baton to us and we have to pass it to next generation. Fr Schmemmann called the controversy over our autocephaly "a meaningful storm." We have to keep holding up the banner of what we are and the vision for what the Church can be in America. If this is the vision

Metropolitan Leonty expressed, and if he saw the unique American qualities here coming to America as an immigrant in 1907—its fast pace, energy, collaborative spirit—if he recognized this, how much more is that true now as we are rooted even deeper in America. We must not try to create a culture within a culture, that's sectarianism. Our aim is to transform culture, engage with it while sticking firmly to our faith and piety.

I'm sensing a general desire to make the Church *work, to serve Christ*. Most people are tired of disputes and just want to serve Christ and be the Church. I say *generally* because there are some who still dwell on the past, but they are isolated. Most recognize that we do have issues to address as Church, but there is a desire to *try things and do something*.

The OCA has a huge strength in simply being the Church. Many are still looking for this. They are shell-shocked from experiences elsewhere and amazed to find what we have. We don't change with the wind, we have beautiful services, understandable, simple gospel preaching.

The OCA vision is still alive and well: an Orthodox Church in America, an American missionary church. Our parishes get this and are multicultural. Eventually we could even sacrifice our own existence to share this with other Orthodox Churches and unite with all to be one Church.

We have the best governance system in the Orthodox world, with lay involvement in the administration of the church. Yes, it's a struggle at times, takes hours of conversation, but in the long run this will bear better fruit than the church dynasties of the old world.

We have talented and active laity and lots of good ideas.

Cindy Heise [Coordinator of the Office for Review of Sexual Misconduct Allegations]: She is a great resource. It's normal now that when we have a difficult situation or questions about misconduct or how to handle the process or the parish, I talk with the bishop and we say, "Let's give Cindy a call." This makes a huge difference to me as chancellor when I have to deal with these cases, to have someone knowledgeable to speak with.

People I meet across the diocese do share the vision of an Orthodox Church in and for North America. Individual parishes and clergy are doing well, there's a good spirit, people are working hard, catechumens are coming.

Even our weakness—the past internal scandals of the last ten years—can be seen as a strength because we dealt with it. All the negativity taught us something. The ORSMA coordinator, the OCA's guidelines and continuing education for dealing with misconduct: this comes out of these negative experiences. We're learning and we have transparency. And we are far ahead of most other Orthodox churches in this.

WEAKNESSES/CHALLENGES

Loss of confidence in having a sense of mission. Loss of fervor about mission to America. We tend to see only our difficulties and problems, but if we don't believe in our own mission no one else will. Danger of becoming parochial at every level: parish, diocesan, national, jurisdictional.

Wringing hands rather than getting on with it. There should be a shift in focus to what we *can* do in midst of problems, but negativity is still there, especially among clergy. We need to deal with our differences in a Christian manner rather than use polarizing language of us/them, liberals/conservatives.

We need to have a “bigger” heart regarding our autocephaly as well if it can give place to something better for Orthodoxy as a whole. The OCA can be like St John the Baptist, the “Forerunner” of autocephaly, pointing the way to what’s possible but stepping aside when the bigger autocephaly comes. We are not good at identifying and recruiting the next generation of leaders: theologians, bishops, clergy, laity.

Declining membership, especially in the Northeast and Midwest. Small parishes, while positive in some ways, are hard for youth to connect, especially as they get older. Those social linkages keep youth involved. Regarding youth, the budget of the Central Administration was pared too far: we need a fulltime youth director and youth directors at every level: parish, deanery, diocese.

Bishops need to support the central church when they are back in their dioceses.

On international trips, in addition to regular representatives needed to develop relationships over time (Metropolitan, bishops, chancellor, external affairs etc.) include others from the various dioceses to build exposure for them to the Orthodox Church around the world. This will help deal with parochialism.

We need long-term planning, a 20-year plan, to change attitudes around tithing: seminaries need to teach this. Bishops need to stand behind this, give an example and influence the parishes. Need to demonstrate more clearly how the CCA connects to ministry at local level. What is administration? What does it take to have an autocephalous church? Focus on vision. “Money flows to vision.” Need more data from parishes to plan for future, especially income and stewardship data. Consider whether dioceses may need to consolidate. We need to look at realities.

We are not bold enough, and perhaps our bishops are too timid, influenced by the litigious society and the excesses of the past. There’s a reluctance to speak clearly. Can we stand up for our vision? Can we be bold? Can we fight for it and resist opponents and bullies?

How do we prepare priests to be pastors in today’s complex environment? How to deal with new issues? It’s difficult to be a pastor and to prepare and care for pastors. There’s carnage out there, and how many fall by the wayside.

How can we fund our church so that it is healthy? The current attempt is a step forward but North America has such abundance. Are we willing to support stewardship to enable the Church to do its work? This is a symptom of decline in many parts of the church.

Even to *ask* the question, “what are our weaknesses” is already a strength. “When I am weak, then I am strong.” I hope our church continues to be weak, because then it is at the Cross. And then it is the Holy Spirit who gives us direction.

How do we answer on a regular basis the questions put to us by culture, by our own people living in this culture? What is our response to American culture?

We need to be a counter culture. See humanity in everyone. This caring is what gets people's attention. As they say, "No one cares how much you know until they know how much you care."

The foreign trips of Metropolitan Tikhon and others are necessary to keep us connected to the rest of the world, and especially world Orthodoxy. Not only to be part of the wider church—which has undergone such huge changes in the last 25 years—but equally to identify with their suffering, as with the Church of Armenia. We need to be less isolationist and to identify more with these other churches. Get outside our parochialism and get outside our comfort zone. This needs to happen on the parish level as well to reach out to the community and go to the highways and byways, as Jesus insisted we do.

We do have issues to address, but the whole environment is now better than it was in 2011 for doing so. There are concerns about the Assembly of Bishops. Down the road are we going to be sold out? Will we even have a choice? Will we be swallowed up? What will happen to property and finances as we merge?

We are trying to reverse trends in shrinking parish numbers, and to be positive, but I'm very concerned about small and dwindling parishes, the welfare of priests and their families and especially of newly ordained seminarians. I'm going to face a challenge about what we're going to do with this. The number of parishes under 50 members is scary. The demographics are scary. The sheer economics of paying for health plans is breaking the backs of these people. How will small parishes survive? How do we service them? We have to come to terms with mergers and closures. We have more and more parishes being served by substitute clergy. They're not going to grow. And I don't want to be a diocese where 90% of the clergy are bi-vocational. And with what diocesan structure? Because the admin cost to support a diocese is huge, relative to the number of parishes we have and their numbers. In the diocesan center we're struggling; there are too few of us who work on diocesan admin. We struggle to get our jobs done.

We've tried various church growth programs in the diocese over a number of years. I have a high regard for the people involved but the results are disappointing. Some things about all this are beyond our control, given many societal factors. But I have to admit that part of the problem we have to accept for ourselves is that to some extent the problem is burned out and apathetic clergy. I even struggle to get some priests to turn in basic forms, because there are no consequences. The bishop may get angry, but unless there are consequences what good does that do? But I also know how these burned out priests have gotten beaten up over the years, emotionally and financially. I can be compassionate, but then they should think about retiring. Only they *can't* retire because they have no resources. There are places where nothing is happening, where all the parishioners are 60+. You need a core of people to get it working. A burned out priest surrounded by burned out people trying to pull the engine doesn't work. I think we need to consolidate parishes, ensure that we can have full-time priests and focus on re-missioning old time parishes rather than just plant new missions.

What I've missed is the sense of collegiality among the colleagues, that you can be with them without being judged. On top of this we need to police ourselves better on the appropriate use of social media. Are we using it with grace and kindness, or being vile to each other? There's too much of that, especially public disparaging of bishops and administration. Where is the professional courtesy, not even to speak of Christian civility?

I'm hearing from a wide variety of priests and lay leaders that one of the biggest structural deficiencies in the OCA is our ethnic dioceses. Until the ethnic dioceses become fully integrated into the OCA—and not just financially—we are not truly a model of what an autocephalous church can be.

Priests are under tremendous pressure, especially in their early years. You're really dependent on producing your own fruit. And your livelihood is tied to church growth. We're asking them to do a lot. This can be stressful over time, as a priest balances all this with family life and often other work. Not everyone has the gift of doing this and taking the initiative to get a community off the ground and putting up a building etc. At the start the priest needs to organize almost all the activities in small churches. We don't have "program sized churches" where the priest can just be the manager. We need well-rounded men who can survive and prosper in this kind of environment, though others could be good second priests. The OCA planting grants have been very helpful here, but it's all very fragile.

People want the bishops and church leaders to simply *be* the autocephalous church, to act like it and stop apologizing and being so hesitant because of fear of what others will say or do. We're doing what we have to do as the OCA. We don't need to cower. This applies to administrative decisions as well. Don't be so afraid or hesitant.

Overall there is a positive view of the OCA's leadership, but how individual situations in the diocese are being handled is bringing this down. There is frustration when promises are made but there is no follow through. There are decision-making bottlenecks from the Holy Synod and not enough guidance. There is frustration over the lack of vetted candidates for the episcopate.

How the OCA handles misconduct cases is much improved, largely because of now having a Coordinator. But there appears to be too much discussion and too little decision-making. Too many people are involved in the process. This is a huge issue, and people feel that everyone is passing the buck. The system is paralyzed. And in one of the parishes affected, which already has an anti-clerical reputation, it only makes things worse. "Why should we pay for a problem we didn't create? Why should we pay for a substitute priest's travel, hotel and services? Why isn't the OCA paying?" The diocese is small and people know each other, so complaints spread and affect morale.

The PSP's are good [*Policies, Standards and Procedures on Sexual Misconduct*], but we need to move beyond this single issue and deal with the whole realm of clergy care and formation. We need to ensure that the personal and pastoral dimension of the PSP's is not overlooked with complainant, respondent, their families and the parish. Would that we put the same amount of time and effort into mission planning and training and clergy care as we do into sexual misconduct. To be a pastor today is much more difficult than in years past. We must be even

more careful therefore about who we choose, how we form them and how we mentor them. Seminarians need to hear from experienced priests about what they are facing now.

Priests are under stress. Many are struggling in their parishes. There's marital stress, divorce, misconduct. The OCA needs to address clergy selection, formation, health, mentoring. Students in seminary, after graduation and in the and early years of ministry need support and monitoring. In this regard I'm not satisfied with the seminary/OCA/diocese connection and follow through. Priests at every stage of their ministry—and now too as many are aging—need more comprehensive mentoring and support.

Finances are a persistent trouble spot on the local level. Parishes are struggling. My own parish has 11 families that lost their homes. Many parishes are not making their budgets. “Just have faith” needs to be supplemented with training and resources and help to parishes to enable them to stand on their own. But the solution is not to cut salaries, especially at the national level, because we need a strong presence at the national level.

Finances in many parishes are not good. Some haven't paid assessments. Others are behind. Others are asking for a period of relief and for the diocese to pay on their behalf. But the Diocese is financially in the hole every month, and this can't be sustained. Some parishes have crippling mortgages, and even though they have a good spirit they find it tough to survive. Part of the problem stems from the past. We went through a lot with the scandals. Numbers went down. People became bristly.

We have lots of good ideas and lots of meetings and lengthy documents but not enough obvious results. The talk in committees is good—AAC, MC, assemblies etc.—but we also need to follow up and go from A to B. There's too much power given to committees. They are meant to be advisory bodies to those who are responsible for making the decisions and taking action (bishops, officers).

We're not addressing the issue of our ethnic minorities, immigrants (I'm thinking especially about immigrants from former Soviet Union). We can't claim to be an autocephalous territory without at the same time helping immigrants to make their home in the US or Canada and to embrace the OCA's vision. Perhaps we need a special commission to address this as a pastoral problem.

Standard procedures are needed for vetting transferred clergy from outside the OCA, and especially from overseas. These must be uniformly applied in all dioceses. We need this to weed out charlatans.

OPPORTUNITIES

We need to champion the OCA vision much more and articulate it more effectively: hierarchy, clergy and laity working together. There are tensions between conciliar and hierarchal and we are constantly working to find the balance. But this is hopeful and is our particular struggle in our time and place. Keep refocusing on Christ and the gospel. Be okay with weakness and finding strength there.

We need to be, and can be, little outposts across the continent of genuine, normal Christian faith. Good preaching, beauty, service, education, liturgy. New seminary graduates need to be exposed to this and trained how to set up new missions.

The web gives us a huge opportunity. Go online, this is what young people do. Either we participate fully in this and have a future or we just give up. I wish we had more communication in general. The ‘Chancellor’s Diary’ is good, but the MC and HS only meet twice a year. We need more webinars and skype meetings and such to keep us together, especially when so many of us are isolated from each other geographically.”

I would look at reaching out to the immigrant communities with the vision that the OCA has to offer. But we can also help them settle in North America. In addition we can also look at the traditional Orthodox countries to see what they are doing to build up their churches, and learn from them what might also work here to advance the spiritual and material well-being of the Church (pilgrimages for example).

THREATS

The big worry is about the Assembly of Bishops. There are concerns about where this is going. Are we going to be swallowed up? Will our bank accounts and properties be handed over? Do we have a place at the table? Will we lose our bishop? Will we as OCA be lost in the shuffle? It would be a big mistake to lose autocephaly, unless it’s to an autocephalous united church that includes everyone. The OCA vision is the future, and people are concerned how to read what’s happening right now in the Assembly of Bishops.

People *are* out to get us, as the OCA. The big question is whether the other jurisdictions will gobble up the OCA. There is concern over the OCA’s place in the whole scheme of Orthodox unification in North America. We want to be part of the Assembly of Bishops but not swept aside or used as pawns in a chess game. I sometimes think we had a brighter future in the ‘70’s than we do now.

We’re in a litigious society and have to be so careful. Our hands are tied by what we can or can’t say, liabilities, risks. Administration and putting out fires takes a lot of time and robs us of time to do more direct pastorally-related things.

Clergy misconduct—sexual, alcohol abuse—is a big threat, which is why it’s so good to have someone in Cindy’s position that we can call on. But in general we need more attention to prevention and training and to clergy care.

It’s good that we are dealing with misconduct and continuing education, but we also need to ensure that the bishops are engaged with this. Are the bishops taking seriously our documents, or are they making exceptions here and there, and playing favorites? If there is a policy, it needs to be followed.

We're not connecting with younger generations. And this is a problem across the churches. General social trends are affecting us, such as relativism and "pick and choose" spirituality. Youth especially are also watching how we respond to issues of sexuality, the environment and human rights.

SEXUAL MISCONDUCT POLICY ADVISORY COMMITTEE (SMPAC)

CURRENT MEMBERSHIP

Archpriest John Jillions (*ex officio*, Chancellor, Chair), Archpriest Eric Tosi (*ex officio*, Secretary), Archpriest Theodore Bobosh, Archpriest Alexander Garklavs, Protodeacon Peter Danilchick, Ms. Cindy Heise (*ex officio*, Coordinator, ORSMA), Mr. Robert Koory, Esq., Special Legal Liaison, Dr. Albert Rossi, Mr. Bernard Wilson (Chief of Police, Retired)

MAJOR ACTIVITIES AND ISSUES

- SMPAC is tasked by the Holy Synod of Bishops to provide advice on matters of sexual misconduct, and strives to provide such advice as honestly, clearly and courageously as possible. To that end SMPAC works directly with the Office for Review of Sexual Misconduct Allegations (ORSMA) and regularly meets with (or offers assistance) to the Holy Synod of Bishops.
- It is the goal of the entire Church to provide a safe and healthy environment for all of the faithful of the Orthodox Church in America. SMPAC continues to review and revise ways to strengthen the Church as a safe haven for all.
- Works closely with ORSMA to find justice and healing for all concerned, complainants and respondents, in the allegations of sexual misconduct.
- ORSMA, although officially established long ago, has increased its effectiveness significantly over the past several years via its close relationship with SMPAC and its hiring of the ORSMA Coordinator.
- Continues to advise about the reporting progress of dioceses and parishes for the compliance on the Annual Parish Compliance Report.
- Advises on the process to provide a unified approach to background checks and screening processes for parishes, dioceses and institutions.
- Continues to discuss the need for a privacy statement and the implications of such an approach, such as who would have access to the information.
- Deliberates the ways in which databases with information about volunteer applicants as well as Registered Sex offenders need to be maintained, on parish, diocesan or perhaps ORSMA levels.
- SMPAC abides by the “fairness to all policy.” On the one hand, we need to insure that the accused is not being accused falsely. On the other hand we need to be prepared to

support and investigate any allegation of a complainant and bring the investigation to a strong recommendation.

Despite having a “fairness to all policy”, one still encounters certain temptations or biases. One temptation in cases involving a priest “respondent” and a woman “victim” is to view the woman as the “temptress” and the priest as an “innocent bystander.” This temptation lends itself to minimizing the allegation of the woman or blaming her for the situation. Unfortunately this temptation is embedded in some peoples’ minds rather deeply.

Another temptation is to mitigate the ravages of sexual abuse. Sexual abuse by clergy permanently damages the victims in every way, especially their relationship with God and with the Church. When a clergyman abuses a victim it is not unlike having the fox inside the chicken coop. The opportunities are endless. Other innocent persons are likely to be at risk unless something is seriously done to rectify the situation.

One other temptation is to wrongly project a sunny future for the clergyman who is an abuser by providing a slap on the wrist and some therapy. We need to be attuned to any possibility that the abuse will occur again. We need to be keenly aware to protect potential future victims.

- New cases of sex offenders from previous years continue to surface. SMPAC, advising ORSMA, is working on a plan to deal with these cases. The temptation is to be swayed by arguments like, “that was a long time ago; look at all the other good the person has done; or he has paid his debt or we are the Church and we must show love and forgiveness.”

The primary emphasis must be on keeping the Church a safe haven and protecting potential future victims. Perpetrators, whether convicted, repentant or expunged, may in fact have to live with a very different version of being ministered to, one that may or may not include private reception of sacraments or strict controls on or even prohibition from, participation in parish life.

We can love and forgive and acknowledge that the person may have paid his debt to society, but the act of sexual abuse can become an impediment to his ministry or participation in the fullness of the life of the Church. Being loving and forgiving does not end being vigilant or being concerned for the integrity of the priesthood.

There has to be an understanding that this isn't about punishing anyone. The focus is on protection. Protection of the innocent, protection of the Church, protection of all concerned from risk.

- Continues to develop prevention and education tools.

CHARTER OF THE SEXUAL MISCONDUCT POLICY ADVISORY COMMITTEE

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

AUTHORITY, RESPONSIBILITY AND SUPERVISION

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

BACKGROUND

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

DUTIES

Provide advice on how to improve both the content and effectiveness of the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct*.

Assist in reviews of the extent to which the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct* are implemented in practice and how compliance with them is ensured.

Assist in finding and nominating qualified professionals, who would be called on to do investigations when occasions arise.

Assist in developing increased and improved training for clergy, Church employees, and applicable laypersons to enable a better understanding of their duties under the revised *Policies, Standards and Procedures on Sexual Misconduct*, including their mandatory reporting obligations under various state laws.

Assist in any other requests for advice made by the Holy Synod of Bishops and the Office.

JOB DESCRIPTION OF THE SECRETARY

SUPERVISORY AND JOB CONTROLS

Is assigned 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/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
2. Maintaining the legal status of the OCA. Implements and assures compliance with Federal, State, and local statutes and other relevant regulatory requirements.
3. 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.
4. 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.
5. 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.
6. Serves as a voting member of the Metropolitan Council.
7. 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.

8. 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

JOB REQUIREMENTS

1. Proven executive and management skills and knowledge of a wide variety of non-profit management principles and practices.
2. Thorough knowledge of the structure, traditions, and key personnel of the Church.
3. Ability to express and present information, ideas, and conclusions clearly, concisely, and forcefully both orally and in writing.
4. Proven ability to work effectively as a team member.

REPORT OF THE SECRETARY

Archpriest Eric George Tosi

“For God is not the author of confusion but of peace, as in all the churches of the saints.”

1 Cor 14:33

INTRODUCTION

I would be remiss if I did not state outright that the last four years have been most interesting if not downright challenging. It has been a time of turmoil, transition and ultimately stabilization. We have come together through one of the most difficult times in the short history of the Orthodox Church in America in which we, as a Church, experienced upheavals, mistrust, misinformation, and a swirling round of intense work to address these issues. Yet we, as a Church, confronted them, one by one, patiently and responsibly and in as timely a manner as was possible due to the circumstances and the issues. The result was a level of stability and a growing peace in the Church. Not everything is perfect and certainly there is much to be done but one can sense a level of peace and stability settling into the work. Whatever the issues and whatever the decisions (some of which people agreed with and some of which people did not), they were our issues and our decisions as the Orthodox Church in America. We worked through and resolved our own issues and perhaps this is the critical sign of the maturing of our very young Church. These are our issues and we will resolve them.

Perhaps the reasons there may be some skepticism is that often there is little public insight into the background of these matters. It is difficult to impart sensitive material, discussions and even the circumstances of the events themselves. This is exacerbated by the ever growing world of communications in which some of what is reported is accurate and some is clearly not. What we as a Church must bring to this world is prayer, discernment and a healthy dose of skepticism that not everything that is reported is actually true and helpful. What we must do is to communicate with one another, talk to the clergy, talk to the hierarchs, talk with those who will be of a sober mind and clean heart. As Metropolitan Kallistos (Ware) stated, “As Christians we are here to affirm the supreme value of direct sharing, of immediate encounter -not machine to machine, but person to person, face to face.” Our stability as a Church rests on that simple paradigm of “person to person, face to face.”

With that being said there are a host of persons that deserve the gratitude of the entire Church. They range, first and foremost, from the many volunteers from the clergy and laity who give of themselves and their time. In a period of reduced budgets, decreased personnel and increased responsibilities for a shrinking few, it is these people that the Church relies upon daily. Many of these persons’ names will never be known but to a few but these volunteers all have the love of the Orthodox Church in their hearts. Likewise we need to thank the hierarchs, clergy, staff and administration who labor in the vineyard in various ways, all bringing to the Church their love and dedication to Her vision and mission. Our Church is not built on edifices of stone and mortar but on the faithful people to whom God has entrusted the Church, whether as pastors, rectors,

teachers, laity and, yes, even the administrators who work on the behalf of all. We are humbled by them and the Church could not do what it does without them.

Among the first, deep gratitude must go to His Beatitude Metropolitan Tikhon whose wisdom, patient leadership, deep faith and inexorable good humor allows all of us who work with him to truly feel we are cared for, listened to and led. I have watched him over the past two years respond to some difficult situations, navigate challenging problems, and address some of the most critical areas of Church life that OCA has ever faced. He has done so with the highest integrity and humility. He is seen worldwide as a true leader and, what is perhaps most important to him, a true monk. I am extremely thankful to be working for and with him.

I also must thank my fellow Officers and co-workers, Archpriest John Jillions, Protopresbyter Leonid Kishkovsky, Melanie Ringa, the Chancery staff and the many, many people I come into contact with on a daily basis. The members of the Holy Synod with whom I speak to on almost a daily basis, the Metropolitan Council with whom I work closely with, and all those who work for the Church. I must thank my ever-loving wife and children who patiently endure the missing hours I am away from them. I thank all of them for their patience, their friendship and their support. They are family and they are our family in the Church.

A GENERAL OVERVIEW OF THE POSITION OF SECRETARY OF THE ORTHODOX CHURCH IN AMERICA

As stated in the job description, the Secretary of the Orthodox Church in America serves as the primary administrative manager of the OCA. His functions include maintaining the legal status of the OCA, supporting the Church's Councils and Synods and serving as team leader for planning and logistics of All-American Councils. This also includes collecting, analyzing, summarizing, preserving, and serving as repository for the OCA's official records and materials, including its Archives, and providing reports and other information to the Holy Synod, Metropolitan Council, Legal, and the host of Boards, Commissions and Departments and Institutions of the Church. The Secretary also serves as the officer of the Church responsible for assuring regular ongoing communication between the Metropolitan and his staff and for communication among the members of the staff. The Secretary serves as a member of the Metropolitan Council.

Among his other duties are directing the administrative, housekeeping, estate management, and personal service functions of the OCA Central Administrative Offices. This comprises 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. The Secretary also establishes policies and procedures, supervises staff, and assures compliance with legal, regulatory and established best practice guidelines.

In addition, the Secretary's position has evolved to include managing all communications efforts of the Orthodox Church in America including the OCA website, official publications, official statements and serving as spokesman for the Church when directed. Included in this work, the

Secretary is a primary member of the Crisis Management Team which addresses specific issues that arise when related to Church work that may involve public relations or responses on specific situations and incidents which affect the entire Church. This also includes coordination of efforts between the Central Church and the Diocese on specific communication matters. There are a host of other additional duties which arise when delegated such as representing the OCA or the Metropolitan at events and meetings which have critical importance to the life of the OCA.

HOW HAS THE SECRETARY CONTRIBUTE TO EXPANDING THE MISSION SINCE THE 16TH AAC AND EXPECTED WORK FOR THE FUTURE

All public reports of the Officers, Boards, Commissions and Departments are posted on the OCA website following the Metropolitan Council meetings in the Spring and the Fall. Much of the work of the Church, particularly the Central Administration, is detailed in these reports and can be accessed for more insight into the activities since the last All-American Council. In addition, various press releases detail the various meetings and initiatives of the Church and provide an additional insight into the multifaceted work at the Chancery. However, such reports do not always capture the massive amounts of background work, coordination, administrative and logistical challenges that occur on a daily basis. This, combined with the reduced staff means that many of the staff work in many varied areas that are outside of the original scope of their position. Highlighted here are some specific points generalizing the work since the last Council.

ADMINISTRATIVE

The position of Secretary calls for the maintaining the status the Central Church administration. As set forth in Organization Task Force recommendations in 2006, there was a major reorganization in the jobs and responsibilities of the Chancery. Since this reorganization, almost \$700,000 has been cut from expenses through streamlining the organization and ensuring dedicated jobs to particular areas of the operation. The staff was reduced from that time from over 30 people to the current level of 7 on-site full-time employees and 3 part-time employees, 1 of whom is off-site. In addition, there are 2 other positions in which the work is shared with parish ministry and there is one contract employee.

In short, the Chancery relies on many part-time employees and volunteers in its operation. Most of them perform many duties beyond their responsibilities with a small full time staff to oversee or do the actual work. For example, the Communications Team, which is managed by the Secretary, consists of two part time employees off site and a contract employee off site. Another example is ORSMA which is managed by the Chancellor and has one part time employee off-site and several volunteers who assist in their areas of expertise. Supervising all of this work is the Metropolitan, assisted by the Lesser Synod and in conjunction with the Holy Synod and Metropolitan Council. While there are some areas of management that will need discussion and refinement, particularly in the areas of departments and other Church-wide initiatives and organizations, the system has worked fairly well since 2006.

As an additional note, all employees have a job description and their performance is reviewed annually by the Officers. There is a handbook for guidance and strict policies on best practices

(every employee and member of the Holy Synod and Metropolitan Council is required to sign best practices documents annually). These are, in turn, overseen by both the Human Resources Committee and Internal Governance Committee of the Metropolitan Council. All employee records and files are examined by the Internal Auditors and have received excellent reviews. There are weekly electronic timesheets which are reviewed by the auditors and me. The work of the Chancery is being done with the highest professional standards.

A special note of recognition needs to be given to two former and long-time employees of the Chancery who have reposed in the Lord. Helen Detke and Greg Sulich were bulwarks of the Chancery operation and for many in the Church, the direct contact with the Chancery. They dedicated their lives to the vision of the OCA and their love for the Church. Both were taken from us too quickly and too soon and are greatly missed by all of those who worked with them and knew them. We still hear the echoes of their voice in the hallways of the Chancery. May their memories be eternal!

A major project that began shortly after the last AAC was the reestablishment of the central database. The old database was in serious jeopardy of collapsing and had not had the level of maintenance and attention that was needed. The project commenced in conjunction with the redesign of the new OCA website which allowed for a seamless integration between the new website and the data feed into that website. As such a team of individuals worked through this project specifically identifying and recreating the necessary background, data feed, and reporting procedures which would allow the database to be an invaluable tool for Chancery operations. While the project is not yet complete, it is being done in phases on a very tight budget, and the first phase has already proven its value. Much thanks must go to Barry Migyanko, administrative assistant and Ryan Platte, technical manager, for their many long hours in working through this project. The final result will be a streamlined centralized database which can feed information to and from the Chancery, the dioceses and the website. All clergy and parish records will be in a secure and tightly restricted database that can be utilized in a variety of ways including mailings, tracking of stewardship, generation of reports and analysis of critical Chancery operations. The servers and other technology required to control such operations as the website and the various databases are on redundant, exclusive systems with multiple off-site back-ups and up-to-date security and protection.

COMMUNICATIONS AND WEBSITE

When the communications aspect of the OCA was transitioned to the Office of the Secretary, there were a few goals that were set. First was to be timely AND accurate so that everything that was posted on the OCA website was official, since it is the official communication organ of the OCA. Many of the official statements were cleared by the Metropolitan and the Holy Synod, sometimes in conjunction with the Legal Team and the Crisis Management Team. This ensured accuracy on the official position of the Church. This sometimes delayed postings but it was the considered opinion that this was necessary in those circumstances. There were many late nights reviewing official statements for one final check before posting. However, for more ordinary postings, the web team has posted material far in advance of any other outlet and has a goal of a new post every day, which has been met consistently. The second goal was that the website should represent the whole of the OCA in a responsible manner. Those people who do read the OCA website (it is read in over 50 counties by hundreds of thousands of people) do so to get the

news and the flavor of the Church. Our info@oca.org email address gets questions from around the world and is considered the best electronic source of information on Orthodoxy in the world. The third goal was to make sure that the website responds to the needs of the Church so that people can actually use it and get a response. For this reason we are present on all social media platforms (which are closely monitored) and have a responsive and well trained team.

Continued thanks must go to the communications team of Fr. John Matusiak, Jessica Linke and Ryan Platte. They really do work above and beyond even though they are part-time. Reporting of the news is timely and accurate and the team often works late into the evening and on weekends to address sudden demands. We owe them a debt of gratitude for their good work. It is sometimes questioned why so many people actually are involved with press releases and website operations. The reason is twofold: first there is a clear hierarchy of posting, Fr John writes them, team reviews them, Jessica posts them and if some technical aspect is needed (like a video) Ryan handles that. Our record posting is under a minute so we are quite efficient. The second reason is for accountability. We must be accurate and we must ensure that nothing slips through so we have a few eyes on the posts. It protects all those involved and it is actually quite an efficient system.

This does not mean we have not been without controversy. We are working on some new standards for the website and a new editorial policy which will be in place over the next year which will mitigate certain issues. There is also a plan to begin the process of reviewing the current website and freshen the design. This is common in the industry after 4 to 5 years to ensure the latest “look” and technology are utilized.

As was reported numerous times, *The Orthodox Church* and the *Sourcebook* are no longer printed. This was primarily due to the cost of printing such items which could not be justified with the reduced budget. The Chancery fully understand the value of having a printed item in the hands of the Church members and is looking at alternate manners of doing this. One new publication will be the annual *Orthodox Journal* which will review the year in the Church. The first issue is due out soon. Likewise, other manners of electronic communications including targeted emails and releases are being considered for the future. The annual Church Calendar will still be printed and sent to all clergy free of charge (we have consistent donors for this item). Other publications from the now defunct Orthodox Christian Publication Center (this has been turned over to SVS Press from which the Church receives royalties) are in the works including the new publication of Fr. Thomas Hopko’s Series on the Church and Metric Books for parishes. The publication of these items will be announced as they are completed.

CHURCH COUNCILS AND MEETINGS

As the Secretary of the Orthodox Church in America, I am responsible for organizing most every meeting whether it be the Holy Synod, Metropolitan Council or the host of committees, commissions and boards. I am directly responsible for putting together the agenda for these meetings, reviewing every set of minutes and maintaining the files. Every meeting has a multitude of logistical planning issues that must be worked through. There are meetings almost every week at the Chancery, whether in person or telephonically. These can often extend late into the evenings or on weekends. But the operation of the Church depends on these meetings. I am assisted by very competent staff members and volunteers. Every meeting requires planning, scheduling, logistical organization and smooth operations followed by the writing, publishing

and filing of minutes. I personally review every set of minutes with the exception of the private Holy Synod minutes. These meetings can be very time-consuming because of the level of detail and sometimes require travel to off-site meeting spaces.

The most important of these is the triennial All-American Council for which I have immediate oversight. This included a special All-American Council in November, 2012 in which we elected a new Metropolitan for the Orthodox Church in America. It should be highlighted that the 16th AAC in Seattle actually came in under budget and money was returned to each diocese.

I have been greatly assisted by a very competent Preconciliar Commission for the present Council (Chaired by His Eminence Archbishop Mark), Council Manager (Fr. Myron Manzuk), Logistics Manager (Peter Ilchuk) and local committee (chaired by Fr. Alexander Fecanin, Barbara Massoudi and Michaela Staskiewicz). So much gratitude must be given to them for their tireless work and countless hours spent in planning and organizing this Council. We began this process over two years ago and worked through so many issues including site selection, contract negotiations, interface with the various committees, agenda planning and report preparation. Each step was well organized and done with a real sense of conciliarity. The success of this Council is due to the many hours dedicated to planning and organizing it. One may not realize the many details that need to be addressed from menus, to the liturgics to even selecting the colors of the table cloths. Each detail was addressed and completed on schedule despite a few bumps.

There are many hours dedicated to the planning and running of the Holy Synod and Metropolitan Council. As such, I am the main interface and planner for the meetings. The agenda, minutes, assignment and collection of reports as well as the dissemination of the material is critical to effective meetings. These meetings are planned well in advance and material disseminated in plenty of time for review. They are intense days for the staff but very effective in the continuing operation of the Church.

I also serve as the Chancery liaison for many of the committees. So countless hours are also spent in attending meetings on a range of areas. The Church operates through these committees which are often staffed with devoted volunteers and need the dedicated work of the Secretary to organize them. Very often, my week is taken up by meetings which are essential for the operation of the Church. Many of these meetings have been reported on the website both in press releases and the posted reports of the meetings. It is well worth the time to look through these and come to understand the multifaceted and varied scope of these meetings. Such meetings would include a varied group ranging from departmental focus groups and meetings, meetings with visiting dignitaries and Church officials, annual meetings of committees.

ARCHIVES

A full report on the work of the archives is attached. A highlight of the work in the Archives is the assembling and meeting of an extremely competent Archives Advisory Committee chaired by the Alexis Troubetzkoy. This committee has done excellent preparatory work in assisting in determining the needs and direction of this invaluable treasure of the Church. All options are being considered as we look to preserve the future of the Archives and make it accessible to the

ever-growing number of researchers who visit the Archives. We are very thankful for this unique treasure of the Church. The archives contain so much of the written history of our Church including private collections of many of our more famous and respected Church leaders. It also contains the records of the Church that stretch back centuries. This treasure is currently housed in the basement of the Chancery building and overseen by our very competent archivist, Alexis Liberovsky. A special note of thanks should be made to Fr. Daniel and Tamara Skvir who have donated many long hours over the past year combing through the archives, working on organizing and assessing them so that they are more accessible.

It is unfortunate that many people do not realize the utility of this valuable resource. Hardly a week goes by without a visitor to the archives doing research. The archives are also used daily by the staff in the operation of the Church. These tasks are effectively handled by Alexis. It is hoped that in the future, the Church will receive a grant to digitize this resource and make it available for researchers online. In the future, certain items in the archives will be better preserved and put on display in the Chancery building so that people can have a greater sense of the history and story of the Orthodox Church in America. Such a new display is the newly-named "Metropolitan Leonty Room" which was a first step in displaying the treasures and history of the Church. Other items have been discovered and are being preserved for future generations to enjoy.

ESTATE MANAGEMENT

Another responsibility of the Secretary is the managing of the estate on which the Chancery building stands. The Chancery sits on 14 acres with a large building that serves as the Chancery offices, Pension Board offices and a residence for the Metropolitan. The building was given to the OCA in 1950s for a total cost of \$1. It represents the only property owned by the OCA as an entity. It is difficult to see how the OCA could ever acquire anything close to it on today's market. While it does need some cosmetic repairs, the building itself is in structurally sound.

Following Hurricane Sandy there was an immediate need to repair parts of the building and clean the property. Insurance covered this work and the result was a major upgrade in the condition of the property. This included the repairing and rework on the first two floors of the building which contained the chapel, public meeting space, and the administrative offices. In addition the grounds were improved and maintained through the work of the contracted groundskeeper and a recent Eagle Scout project (we are hoping for more of the latter). We also reconfigured the third floor to house guest rooms for short term visits. Other work included upgrading the Metropolitan's apartment, installing new drainage, cleaning the attics and garages to make usable space, all of which have improved the condition of the building

The future work on the property must include the removal of the discarded pool at the back of the property, eventual work on the roof (which is now close to 20 years old but in relatively good shape) and work on restoring other aspects of the property. On the whole the property is in decent shape and remains a wonderful headquarters for the Church. The inside is maintained by a full-time housekeeper whose duties extend far beyond just cleaning. She often works late nights when meetings are going on and maintains so much of the building. We looked into an outside

contract and discovered that it would not be cost effective considering the hours and varied duties she performs.

It may be asked what the building actually contain since many people have never visited the Chancery. The basement consists of the archives and storage rooms. It also houses one of the computer servers. The main floor has a wonderful chapel with the relics of many saints. This chapel, dedicated to St Sergius of Radonezh, is the heart of the work at the Chancery and provides a place of worship for a small community that regularly attends there. There is also a sitting room, two meeting rooms, a solarium, a dining room, a kitchen, file and copy rooms. The sacristy is housed off the kitchen. The second floor has the Metropolitan's apartment which has a kitchen, dining room, living room, bedroom and office. There are eight offices including a large office of personal files, and another formal sitting room. These are all occupied by the staff and the Pension Board. The top floor contains two occupied bedrooms (Barry Migyanko and Roman Ostash live on site) as well as three guest bedrooms and attic storage space. All together the space is well provided with the exception of a place for large meetings (we utilize a nearby seminary or hotel meeting room if needed). There are also gardens and pathways which have been restored over the past three years. It is a beautiful setting, under an hour from major airports and a fitting place to meet dignitaries and visitors.

LEGAL AND INSURANCE

One of the requirements of the Secretary is to be the liaison with the OCA General Counsel, and the Metropolitan Council Legal Committee. An excellent working relationship has developed and many important legal issues have been addressed. These issues can range from questions on Federal Non-Profit status, New York State corporate law to issues of civil or criminal law. All of these require consultation and decisions. The Legal committee has worked through these issues in a very competent and professional manner and it is an honor working with them. There have been a number of lawsuits through the past years and they have been systematically and competently addressed. There have been a number of in-depth meetings on legal issues. All contracts and agreements continue to be vetted. It should be noted that the good work of such people as Thaddeus Wojcik, Gregg Nescott, Judge E.R. Lanier and others have been invaluable to the Church and our gratitude cannot be expressed adequately.

We must remember that part of the Secretary's duties is to maintain the integrity of Orthodox Church in America as a non-profit corporation. As such, I maintain all of the 501 (C) 3 documents for subordinate entities of the Church. These are updated annually and reviewed by the Internal Revenue Service. I can report that this is complete and all files are in compliance. I receive requests for letters of determination on an almost weekly basis and assist many parishes in ensuring their compliance. I also ensure that the workplace is in full compliance with Federal and New York State Employment law.

Another area of responsibility is to oversee the insurance of the Orthodox Church in America. We are currently covered by Guide One Insurance (and Travelers for some employment issues). I have worked closely with Michael Herzak and Insurance Systems. We complete annual reviews of our needs and adjust as appropriate. We also participate in specific Orthodox programs that provide proper insurance for over 250 of our participating parishes. Another

responsibility is to offer timely reporting of potential legal issues to the insurance company which will ensure that we are covered in the case of lawsuits. I am happy to report that we have been very successful in this over the past three years and have had no difficulty with coverage. There were some missing gaps in our insurance when I first came on and we have since filled those to provide more complete coverage. I also assist parishes on finding a good insurance carrier for their situation and have handled many requests in this regard.

I also sit on the board of the Orthodox Health Plans, a pan-Orthodox group that manages a combined health insurance program. The OCA is the second largest group on the plan. We review the policies and costs each year and make recommendations on adjustments. This is becoming increasingly difficult due to major cost increases over the past two years. Continued participation in this plan is in question and alternative insurance options for our clergy need to be considered seriously and quickly. For some parishes, the cost of insurance is more than the salary for the clergy. I am able to refer some to different (but a shrinking number of) carriers and provide references for them. We have also been looking into providing all clergy of the OCA with life, disability and long term care insurance. We are very much behind in such protection for our clergy and their families. I also manage the Personal Assistance Program (PAP) which we have with Magellan. This program ensures that all clergy and their families have immediate access to confidential counseling when in need.

OTHER

The Synodal Chancery now provides background checks for all seminarians being ordained as well as a host of other qualified people who are working for or with the Chancery. As such we have contracted Single Source who provides the checks and I am responsible for such work. I have also continued to work on tightening the ordination and clergy transfer procedures and working with members of the Holy Synod on a wide variety of projects. At the request of St. Vladimir's Seminary, I am now managing the Seminary Internship Program for the OCA seniors. This included revamping the program, assigning the interns, meeting with mentor priests and interns and a monthly meeting and course of instruction with the interns. This, we believe, makes it a top line internship program and is in line with other jurisdictions where the Central Church has a stronger involvement in the development of the clergy.

I also have had the honor of representing the Orthodox Church for the Scouting movement on a national and international level. As such I represent the position of the Orthodox Church in such matters and have been the chaplain for some major events. I will be the Assistant Chief Chaplain for the upcoming World Jamboree and the National Jamboree, working with managing the programs.

I have also represented the Orthodox Church in America on a number of initiatives and programs relating to the topic of evangelism. I recently completed my doctorate in this area and have a great passion for the subject. I was able to participate and deliver papers in such areas as the Lausanne Orthodox Initiative, Overseas Mission Leadership Forum, the American Society of Missiologists, WCC/NCC Evangelism Forum, the Fellowship of St. Albans and St. Sergius, the Diocese of Sourozh, to name a few. The highlight of this work has been the recent First Annual Mission School held at the St. Andrew Retreat House in Detroit where we gathered first rate and experienced mission clergy to work with clergy and lay representatives from all of the diocese of the OCA. The goal of this work is to not only explore and present the unique Orthodox approach

to mission and evangelism but also to impart practical and applicable principles that can be utilized in the parishes of the Church.

CONCLUSION

This Council is focused on the theme of on expanding the mission. This must always be foremost in the mind and actions of all levels of the Church, including the position of Secretary. Without such focus, the Church loses its breath and dies. With it, the very lifeblood of the Church goes out into all the world. We must maintain our focus and do everything with that goal...how are we expanding the mission? At my recent doctoral defense, I made the case about how evangelism and mission may involve individual actions but they are really community activities. The questions posed back to me was that if everything is evangelism and mission then is nothing mission and evangelism? The answer is quite simple, everything is mission and evangelism in the Church. PERIOD. Everything we do must be that. Whether it is pastoring a parish, working in a hospital, worshipping in the Church, scrubbing the floors, cooking dinner...and even administering the Church. It is all mission and evangelism. Our challenge is to see that and work as such together as a Church, despite our difference and perhaps because of our differences. St. Tikhon commented in his first sermon to his flock in North America, "I ask for assistance and cooperation not only from the pastors, but also from my entire beloved flock. The Church of Christ is likened by the Holy Apostle Paul to a body, while a body has not one member, but many (1 Cor. 12:14). These have not one and the same function (Rom 12:4), but each its own: the eye its own, and the arm its own. Each member is necessary and cannot be without the other, they all have concerns for each other, and there is no division in the body (1 Cor. 12:25-26). So you also, my brethren, are the body of Christ, and members in particular (v. 27). And unto every one of you is given grace according to the measure of the gift of Christ (Eph. 4:7), unto the perfecting of the saints, for a work of ministration, for the building up of the body of Christ (v. 12). And for this purpose continue with true love to grow into Him Whom belongs the whole body, which is built up of and joined through the supply of every joint, according to the working in the measure of each single part, receiving increase for the building up of itself in love (v. 15-16)." The work we do at the Chancery is precisely a reflection of what St. Tikhon charged the flock in North America.

The Chancery work is not just bureaucratic work but must be seen as a real pastoral calling. It involves people and issues that go beyond simple administrative oversight. It requires a real and true connection between the work of the central administration and the dioceses, parishes and the people. Otherwise, it would be empty work. Instead it connects the whole together. But it is much deeper than that, it is an evangelistic endeavor. Our dearly beloved and lately reposed Protopresbyter Thomas Hopko wrote, "In many Orthodox Church and church institutions, Christ and his gospel serve merely as a pretext for a variety of religious, ecclesiastical, social, and political ideas and activities that have little, if anything to do with the Lord's mission in the world. These ideas and activities may be old-fashioned or modern, spiritualistic or secular, relativistic or sectarian, political or pietistic. They may be sophisticated or simplistic, intellectual or popular, refined or vulgar. But whatever or however they are not rooted in Jesus Christ. Nor are they guided and guarded by the gospel image and teaching of and about Jesus and God the Father; nor are they informed by the Holy Spirit who is always and everywhere the Spirit of God." May we never fall into that trap but rather ensure that all our labors are done in the light of Christ. Fr Hopko continues, "The Church, as Fr. Alexander Schmemmann has said, is not an

organization with a gospel; it is a gospel with organizations; it is not an institution with mysteries; it is mystery with institutions, Church unity, in this perspective, is unity in the gospel of God and the mystery of Christ as revealed, known, proclaimed, celebrated, and witnessed in the formal ecclesiastical doctrines, sacramental structures, and liturgical rites of the Christian churches. In this perspective, Church unity has virtually nothing to do with theological systems, church politics, popular pieties, or holy people. It has only to do with the formal faith, order, and worship of the Christian churches *qua churches*. It is about what the churches of Christ, Christ's one holy Church, believe, teach, pray and do." May we always believe, teach, pray and do.

OFFICE OF HISTORY AND ARCHIVES

MANDATE

The Office of History and Archives cultivates the ongoing development of the historical legacy and vision of the Orthodox Church in America as an essential element of the Church's Mission, and endeavors to assure proper preservation and accessibility of the historical record of Orthodox Christianity on the North American continent.

MEMBERS AND RESOURCE PERSONS

Office of History and Archives

Alexis Liberovsky
OCA Archivist / Director, Office of History and Archives

Archives Advisory Committee

Ex officio Members

Metropolitan Tikhon
Synod Liaison

Archpriest John Jillions

OCA Chancellor
Archpriest Eric Tosi
OCA Secretary

Melanie Ringa
OCA Treasurer

Members

Alexis Troubetzkoy
Chairman

Archpriest John Erickson

Dr. Jurretta Heckscher

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Lisa Mikhalevsky
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Eleana Silk

Archpriest John Perich

Popadija Kitty Vitko

OVERVIEW

The Archives of the Orthodox Church in America (OCA) is the official repository for the inactive records of the Central Church Administration, documenting the All-American Councils, the Holy Synod, the Metropolitan Council, dioceses, monasteries, seminaries, parishes, clergy, departments, boards, commissions, and a variety of external and internal matters affecting the Church.

Additional collections preserved with the inactive records of the Central Church Administration include some 100 sets of personal and institutional archives of hierarchs, clergy, lay leaders, and Church-related entities; as well as photographs, films, videos, computer discs, and other media; periodicals; Church-wide, parish and other directories, anniversary and historical publications; and artifacts from throughout the world.

These rich and unparalleled historical collections include original documents handwritten by the North American Orthodox saints and documentation chronicling the history of Orthodox Christianity in North America dating back to the Alaskan mission in 1794.

In order to fulfill its mandate, the Office of History and Archives:

- Maintains and develops the Archives of the Orthodox Church in America (inactive records of the Church administration) located at the OCA Chancery in Oyster Bay Cove (Syosset), NY, while also collecting and preserving a variety of other materials and resources of historical importance.
- Provides reference and documentary research support to the Holy Synod of Bishops, chancery staff, and other administrative bodies of the Church.
- Assists dioceses, parishes, and institutions in their historical research on their own communities.
- Assists scholars from around the world in their academic research on the history of North American Orthodoxy.
- Provides consultative services to dioceses, parishes and institutions in conjunction with the development of local archives and proper preservation of historical records and endeavors to address instances throughout the Church where valuable archival material is improperly preserved or even in peril of destruction or disposal.
- Produces occasional historical publications.
- Reviews, edits or writes material on the OCA and North American Orthodoxy for the massive Orthodox Encyclopedia currently being published in Russia and for a variety of other publications.

- The OCA Archivist regularly delivers lectures on historical topics or presentations on archival issues
- Fosters historical knowledge and awareness throughout the Church.

Individuals and groups are welcome to visit the OCA Archives to familiarize themselves with the collections or to conduct research on a particular topic. Historical questions may also be directed to the OCA Archivist by e-mail, phone, fax or mail. Donations of historically valuable material are gratefully accepted.

INITIATIVES, ONGOING AND FUTURE PROJECTS

Office of History and Archives

In addition to the ongoing tasks listed above, highlights of the activities of the Office since the 16th All-American Council include:

- As part of his ongoing professional development, in October 2012, the Archivist participated - as both student and lecturer - in the first 10-day training course for archivists of the Russian Orthodox Church, which focused on archival history and methodology. In addition to an opportunity for networking with colleagues in Russia, the course also provided the OCA Archivist with a new perspective on the creation of pre-revolutionary Russian records, including those in the OCA Archives, and has enhanced his ability to serve the many researchers, especially those from Russia, who regularly send historical inquiries to the OCA Archives by email or visit for onsite research. While in Moscow, he also lectured on Orthodox Church history in North America at several parishes and educational institutions, thus witnessing to the rich historical and archival legacy of the Orthodox Church in America to diverse, interested audiences.
- In the wide-ranging research that the Archivist is regularly called upon to do for the Church, the most noteworthy since the 16th All-American Council was in the context of his membership over the past two years in the Statute Revision Task Force. He provided key historical background material for the drafting of the revised OCA Statute, which is being presented for adoption to the 18th All-American Council.
- The life and work of Metropolitan Leonty, beloved Primate of the Church – who, incidentally, was instrumental in creating the OCA Archives - was the focus of two significant events, at which the OCA Archivist presented overviews of Metropolitan Leonty's biography and vision:
 - In March 2013, the dedication of the Metropolitan Leonty Room at the OCA Chancery, where artifacts, archival documents and photos highlighting his life are now displayed;
 - In May 2015, a symposium marking the 50th anniversary of his repose at St. Tikhon's Seminary and Monastery.

- Numerous lectures by the Archivist on historical or archival topics usually with accompanying slide presentations in OCA parishes and institutions as well as other venues.
- Among the visits to the OCA Archives of scholars and other researchers from around the world, two that deserve particular mention here are that of a doctoral student at Tokyo's Waseda University in conjunction with her dissertation on the history of Japanese Orthodoxy, and of a professor researching his upcoming book on Saint Patriarch Tikhon.
- In 2013, the Metropolitan Council mandated the establishment of a committee to assist the Archivist in studying the housing needs of the OCA Archives and in developing solutions. As a result of this decision, the Archives Advisory Committee was formed.

Future projects and initiatives of the Office of History and Archives envisioned for the next triennium include:

- To continue expanding historical content on the OCA website. A dedicated website for the Office of History and Archives is also being contemplated to provide more online resources to a broader audience, including greater accessibility to the OCA Archives through online finding aids, as well as tools to assist dioceses, institutions and parishes in the preservation of their own archives.
- To further develop inventory databases and finding aids of the collections in the OCA Archives.
- To investigate funding and to research methods for digitization and/or microfilming of the collections of the OCA Archives, particularly film, video and audio recordings, due to their limited shelf life.
- To update the booklet "*A Commemorative List of the Departed Servants of Orthodoxy in North America (Diptychs of the Deceased)*," which last appeared in 2002, and to publish it on the OCA website, where it can be readily updated as needed in the future.
- To explore collaborative opportunities for historical and archival work with other Orthodox Churches in view of joint projects in historical research for the upbuilding of Orthodox unity and common historical vision, as well as mutually strengthening archival preservation efforts.
- To increase the visibility of the rich resources of the OCA Archives throughout the Church and the secular academic world as a witness to the Holy Tradition of the Orthodox Church to non-Orthodox, also.
- To complement with historical content and archival material the missionary and educational outreach of other Church ministries.

ARCHIVES ADVISORY COMMITTEE

At its first meeting in December 2013, the Archives Advisory Committee adopted the following mission statement:

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

The following initial major tasks developed by the Committee, all of which tie in to the ultimate goal of improving the housing of the OCA Archives, are in various stages of completion.

- A consolidated overview inventory of all collections in the OCA Archives has been compiled by Committee Member Matushka Tamara Skvir together with the OCA Archivist. While finding aids have existed for individual collections in the OCA Archives, the consolidated inventory is being used to cull redundant holdings across collections and will provide a better sense of preservation needs. It will also aid in publicizing our collections and in the procurement of grants and other funding.
- Committee Member Dr. Anatol Shmelev has drafted an *“OCA collection development and management and deaccessioning policy”* which will continue to be refined by the Committee.
- Potential grants to fund facilities improvement for the OCA Archives and other related projects will continue to be investigated on an ongoing basis. This effort is spearheaded by Dr. Jurretta Heckscher, a Committee Member with extensive high-level experience in grant funding.
- Various experts have been consulted concerning the preservation and housing needs of the Archives. After considering these expert opinions, the Committee decided to proceed with a two-pronged comprehensive assessment with an environmental engineer to evaluate the current facility and a conservator to examine the state of the OCA Archives and to project the life expectancy of the collections under current conditions. Funding for the assessment has yet to be worked out. Based on assessment results, some abatement of conditions in the current facilities may be undertaken, if financially feasible, in order to improve preservation conditions until a new facility is constructed or the Archives are relocated.
- Architect Joshua Frankel (Matushka Tamara Skvir’s son-in-law), of Ennead Architects LLP in New York City, which specializes in designing museum and archive building projects, graciously provided his expertise pro bono during the Committee’s discussions of the feasibility of constructing a new facility for the Archives at Westwood (the OCA

chancery property). Other possible locations for the OCA Archives are also being considered by the Committee.

- Consistent with the Committee's recommendation to enlist interns and/or volunteers in the OCA Archives, the OCA Archivist successfully applied for an intern through the summer internship program at a local university. The program matches students, who are paid by the university, with nonprofit organizations. A history major intern in this program is assisting the Archivist during the summer of 2015.

During the most recent meeting of the Committee in February 2015, the Committee developed an extensive list of projects within the scope of its mission, prioritizing three of them, which will be undertaken in the coming triennium following the 18th All-American Council:

- Digitization of film, video and audio recordings, due to their limited shelf life.
- Archival equipment needs assessment and purchase.
- Weatherproofing the current basement facility of the OCA Archives, as per the recommendations in the environmental engineer's report, once his assessment is completed.

Much gratitude is due to the members of the Committee for their enthusiasm and willingness to volunteer their time and professional expertise to further the crucial preservation of the Church's archival legacy.

EXPANDING THE MISSION

The 18th All-American Council theme "How to Expand the Mission" reprises the theme of the 1st All-American Sobor in 1907, when "the Mission" was the informal name of the Diocese of the Aleutians and North America. Since then, that diocese has grown into the autocephalous Orthodox Church in America. The 1st All-American Sobor was a significant milestone in the history of the Church in North America. The Office of History and Archives seeks to preserve and foster the legacy of such landmark events, as the Church expands and we move forward on the path of salvation while firmly grounded in the awareness of the Church's historical legacy.

We are called to remember those who came before us. A major component in the discernment of the Church's vision for the future must be historical reflection and understanding which must continually be cultivated and develop throughout the Church going forward. This will not only serve to maintain unity in the Church, but strengthen her vision going forward. Such awareness of the Church's story builds among the faithful and those seeking the truth in Orthodoxy a unified historical identity that will enable the vision of the Orthodox Church in America as the local territorial church on this continent to be fully realized. The Office of History and Archives will strive to continue developing such essential historical awareness throughout the Church.

Authentic historical understanding requires study of primary source documents and other significant historical materials, which presumes proper preservation of these documents and

other materials. In support of the Church's Mission at the local level in the coming triennium, the Office of History and Archives will seek to more actively assist dioceses, institutions and parishes in their archival preservation efforts of their own historical records.

The continued prayers and support of the hierarchs, clergy and faithful are respectfully requested for the work of the Office of History and Archives and the Archives Advisory Committee in archival preservation, and historical witness and interpretation for the Church.

TECHNOLOGY SERVICES

Ryan Platte
Consultant

OVERVIEW

It is a privilege to serve the Church as Technical Manager. One of the primary challenges of this role is to pack what could easily be more than a single full-time job into a single person's part-time work.

There are many tasks I perform on an ongoing basis in this role.

- Ensure our services stay up and running. I get prompt alerts when there are any service interruptions day or night. I work to prevent server downtime, and have backup systems in place to keep the site up when incidents occur.
- Ensure that we are ready to recover from disasters with up-to-date offsite backups.
- Ensure that we are safe from attackers seeking to compromise our systems or deface our site—there are a steady stream of those seeking to do both. I have put in place a number of tools and other countermeasures to deal with this threat.
- Manage the Church's image and presentation in the changing technological landscape, including our design, the experience we deliver new devices, and evolving our presence in Google search results, Facebook, Twitter, and other new media.
- Field support requests from OCA staff and clergy, as well as lay users. These include questions about email accounts and setup, triaging glitches users' experience, implementing bug fixes, answering questions about new and upcoming features, and many other topics.
- Keep our links working, directing users visiting pages from old versions of our site to the correct pages.
- Deliver our web pages quickly. I have optimized our setup for very fast performance.
- Maintain our systems, performing system tuning and upgrades regularly to ensure continued performance, security, and compatibility.
- Provide user-experience analytics and insights to Chancery and departmental stakeholders.
- Provide experienced advice on technical feasibility and strategy for initiatives being planned.
- Guide and assist OCA departments and organizations with their technical needs.

- Keep a finger on the pulse of our user needs and expectations, and plan efforts to meet user needs and goals. My proposals to date have focused on concerns including information security, cost reduction, user experience, and visitor acquisition (bringing curious web users to our site and into our parishes).

INITIATIVES AND PROJECTS SINCE THE 16TH AAC

Beyond these many ongoing needs, I have completed a number of projects during the past several years that have moved the Church forward in its use of technology.

- Completed an update to the 2011 design, incorporating insights from our users' needs to provide an arrangement that is both beautiful and efficient.
- Brought Feasts & Saints and Scripture Readings features to new technology, new design, and new user interaction.
- Created replacement for Chancery clergy database. The old Microsoft Access solution has been phased out and we now have a secure, modern database system in place. After further development, we will use the new system as the source of data for the OCA website directories.
- Established shared educational classroom website with Mark Pearson, used by the Department of Liturgical Music, the Diaconal Vocations Program, and the Department of Continuing Education.
- Added Varnish cache. Users see top-speed service, and the site stays up even when the server goes down. The two servers are in different states, and we have DNS failover, giving us geographic redundancy very inexpensively.
- Moved *The Hub* from its old location to oca.org.
- Helped refresh *Wonder* blog.
- Coordinated creation of new website features such as the Sexual Misconduct and Stewards of the OCA areas.
- Created the badging and barcode system for the 18th All-American Council.

JOB DESCRIPTION OF THE TREASURER

SUPERVISORY AND JOB CONTROLS

Is assigned 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 the 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 discussion 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 on-going 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.
5. 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.
6. Serves as a voting member of the Metropolitan Council.
7. Supervises a small staff engaged in financial support activities. Sets goals, assigns work, reviews progress, and evaluates performance.

JOB REQUIREMENTS

1. Well-rounded knowledge of financial and business practices, methodology, and procedures including compliance requirements of government regulatory agencies.
2. Thorough knowledge of the financial structure of the OCA.
3. Ability to consult and advise on sensitive and important financial management issues.
4. While not a pre-requisite, the possession of a Master's degree or equivalent in accounting, business administration, management, public administration, finance or a related field is desirable.
5. Possession of CPA certification or demonstrated equivalent in education and experience is desirable.

REPORT OF THE TREASURER

Melanie Ringa

OVERVIEW

Glory be to Jesus Christ!

Thank you for the opportunity to address the 18th All-American Council and to present this report. So much has transpired on our Church over the last four years, and yet so much remains the same.

My report will cover four main areas:

1. An overview of where we were financially in 2011 and the events that have transpired from 2011 through 2014.
2. The personnel changes at the Central Administration and their impact on the work of the Church.
3. Funding the Work of the Central Administration; the journey since 2011 and the transition from “head tax” to a proportional based method of funding the Church.
4. Looking toward the future, where is this Church going?

Before we begin the more detailed review, here are a few of the highlights and lowlights of the last four years:

DID YOU KNOW.....

- The OCA has been the beneficiary of some very generous bequests totaling \$1.6 million;
 - \$946K Bequest Restricted for Missions and evangelism
 - \$582K in unrestricted bequests from various estates
- The \$1.7 million loan with Honesdale National Bank, was paid off in 2014;
- Annual assessments have decreased from \$2.673 million in 2006 to \$2.304 million in 2011 to \$1.943 million in 2014 – a total annual decrease of \$730K or 27%
- Annual operating expenses have decreased from \$3.459 million in 2006 to \$2.492 million in 2011 to \$2.035 million in 2014, an annual decrease of \$1.4 million or 41%.
- The number of personnel working at the central administration has decreased from the high of 35 in 2006 to 12 in 2011 and now down to 10. In 2013 we lost two longtime beloved employees.

Subdeacon Greg Sulich and Helen Detke reposed within a period of six days in October 2013. Their love for and dedication to the OCA, and their work ethic are irreplaceable, and we miss them daily. May their memories be eternal!

- Professional Fees (legal, accounting and consulting) have decreased from a high of \$860K in 2009 to \$70K in 2014.
- The Central Administration has hosted the diocesan chancellors and treasurers at annual meetings for the last four years since the 16th AAC in Seattle.
- The “Fellowship of Orthodox Stewards” (FOS) was re-instituted in 2013 under the new moniker “Stewards of the OCA” (SOCA), under the direction of the Financial Development Committee of the Metropolitan Council. In its initial year it raised \$60,435, which helped fund the work of the Departmental Ministries (Youth, Education, Liturgical Music, Chaplaincy, Missions, Christian Service and Humanitarian Aid, and Late Vocations).

PART ONE. AN OVERVIEW OF OUR FINANCES FROM 2011 THROUGH 2014

CONDENSED BALANCE SHEETS UPDATED THROUGH DECEMBER 2014 (EXHIBIT A)

The following contains Condensed Balance Sheets for the years 2006 through December 31, 2014. The information for the years 2006 through 2013 was taken from the audited financial statements, and the information for 2014 is preliminary, as the external year-end audit is in progress at the time this report is being written. We anticipate presenting the final audit report by June 30, 2015.

In looking at our balance sheet, a review of the historical information indicates that our net worth reached a low of \$470,506 at the end of 2009. The surplus that we experienced in 2010 brought us back to \$983,642, however the “unrestricted” net asset balance was a deficit of \$843,460 at the end of 2010. From 2011 through 2014, our “unrestricted” net assets worked their way out of the deficit and to a small surplus of \$90,473 by 12/31/14, due to small operating surpluses and in large part to the unrestricted bequests received. Our Temporarily Restricted Net Assets increased from \$808,026 in 2010 to \$1,502,372 at the end of 2014, due mainly to the receipt of the Missions Bequest in 2011. Other notable information on the balance sheet:

- Receivables of \$897,051 at 12/3/14 includes bequests of \$576K, and AAC assessments receivable of \$227K, along with diocesan assessments due in the amount of \$90K.
- Cash of \$979,295 at 12/31/14 includes the restricted Mission Bequest.
- Loans payable of \$43,573 at 12/31/14 represent the balance of an obligation to the Diocese of the South, assumed on behalf of Metropolitan JONAH, in the amount of \$21,198, along with an auto loan payable of \$22,048 on the 2014 Subaru Outback purchased for use by Metropolitan TIKHON.

- Deferred Revenue of \$280,763 represents AAC assessment and vendor/exhibitor fees invoiced in 2014, applicable to the 2015 AAC when the expenses will be incurred.
- Retirement Obligation of \$42,778 represents a payment in lieu of pension to a former chancery employee who retired in 2007.

CONDENSED STATEMENT OF ACTIVITIES THROUGH DECEMBER 2014

To complement our understanding of the financial picture from 2011 through 2014, I have included a condensed Statement of Activities, Exhibit B. For the year 2006 the figures were those completed by Lamos, Lambrides, Moulthorp, LLC. The figures for 2007 are audited figures from Weiser, LLP. The 2008 through 2013 numbers are audited numbers by Lambrides, Lamos, Taylor LLP., and the preliminary 2014 are internal numbers currently under audit by CapinCrouse LLC.

- Diocesan assessments have *decreased* from 2011 to 2014 (\$2.304 million in 2011 vs. \$1.943 million in 2014, and budgeted \$1.873 million in 2015), an annual drop of \$431K, or 18.7%, due to both the decrease in “head tax” from \$105 in 2011 to \$90 in 2015, plus a drop in the total census of dues paying members.
- Fellowship of Orthodox Steward contributions reached a low of \$10,080 in 2012, was re-instituted in 2013 as “Stewards of the OCA” and raised \$60,435 in 2013 and \$34,628 in 2014.
- Under General Contributions, the various unrestricted bequests account for the major portion of the \$464,682 in 2012, \$133,092 in 2013 and \$74,018 in 2014.
- The Missions Bequest of \$946K is included in the Missions Revenue for 2011.
- Misc. Other in 2013 and 2014 includes mainly revenues from the Office of Continuing Education’s workshops, and this revenue is used only to fund the work of that office.
- Total annual revenues have fallen from \$3.295 million in 2006 to \$2.573 million in 2010, to \$2.099 million in 2014.

With decreasing revenues, strict adherence to our operating budget was required. Our Professional Fees, which reached a high of \$860,566 in 2010, settled back to a more manageable level, averaging \$257,293 annually from 2010 through 2013. In 2014 we changed the way we approach legal counsel fees, and reduced legal fees from \$155K in 2013 to \$24K in 2014. We have also negotiated our external audit fees down from a high of \$116K in 2007 to a much more reasonable \$34K in 2014. The result of all this was total Professional fees of \$70K in 2014 versus that prior average of \$257K. Here are other notable highlights from our Income Statements from 2011 through 2014:

- General Administration expenses (other than Legal, Accounting and Other Professional Fees) were reduced from \$2,459,911 in 2006 to \$1,662,908 in 2010. These expenses increased slightly in 2011-2014 to slightly over the \$1.7 million mark, and the 2015 budget is \$1.636 million.
- Program and Ministry funding was cut from its high of \$668,509 in 2008 to a low of \$131,472 in 2010. From 2011 through 2014, these programs have received increased funding, averaging \$225,179 annually and funded with FOS/SOCA revenues and supplemented from operating revenues. The budget for 2015 includes \$196K for these programs (including Church Planting Grants).
- The Mission Bequest has been “board restricted” by the Metropolitan Council, with the earnings designated for use in the Missions and Evangelism program. For 2015, these funds were used for a one-week Mission School, held in Detroit during the week of April 20-24.

In order to complete the picture, following is a condensed statement of cash flows which further illustrates the cash position of the OCA over the last three years. The Income Statement does not present a complete picture of our cash flow. Principal payments on our debt are not reflected on the Income Statement. The Statement of Cash Flows includes these principal payments on our debt.

Condensed Statement of Cash Flows

	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
	\$			
Change in net assets	1,150,034	\$495,878	\$(54,791)	\$66,941
Adjustments to reconcile change in net assets				
to net cash used by operating activities:	(697,005)	345,563	120,088	(24,779)
Net cash provided/(used) by operating activities	453,029	841,441	65,297	42,162
Net cash from/(used by) investing activities	(55,070)	(21,337)	(8,098)	6,944
Net cash provided by/(used by) financing activities	(118,466)	(624,596)	(66,816)	0
Net increase/(decrease) in cash	279,493	195,508	(9,617)	49,106
Cash and cash equivalents, beginning	464,805	744,298	939,806	930,189
Cash and cash equivalents, ending	744,298	939,806	930,189	979,295
Unrestricted				
Cash.....	\$154,375	\$80,443	\$48,059	\$88,501

This completes the update of financial activities over the last four years since our meeting in Seattle.

PART TWO. PERSONNEL CHANGES AND IMPACT ON THE WORK OF THE CHURCH

Exhibit C contains a chart and graph of staffing level and total compensation versus the total budget for the years 2006 through 2015, showing further staff reductions since 2011. In the last four years we have reduced our staffing by 2 full time equivalents, and the impact on the work of the central administration is not insignificant. One of these positions was an Administrative assistant/assistant to the Metropolitan and the other was a full time accounting assistant. When Greg Sulich reposed in October, his position was not replaced. When Jessica Linke, the full time accounting assistant, married and moved out of the NY area, she was not replaced. Greg's duties were assumed by the Assistant to the Chancellor and the Metropolitan's assistant. The accounting duties were assigned on a very part time basis to an employee of the Pension Plan; she devotes 5 hours per week to the OCA accounting function. The decision to not replace these employees was driven mainly by budgetary constraints. Less staff also makes it much more difficult to add projects such as Stewards of the OCA development work. Assisting the Metropolitan with his personal secretarial and administrative needs was delegated to the Archdeacon Joseph Matusiak; this is challenging as the Archdeacon is employed full time at St Vladimir's Seminary. We have been fairly creative in dealing with the staffing changes, but we are at a point where any further reductions will require a complete transformation of our philosophy and structure of the central administration. **Exhibit D** lists all of the central administration positions, with the 2011 staffing level and total cost as compared with our current 2015 staffing and personnel costs by position.

PART THREE. FUNDING THE WORK OF THE CENTRAL ADMINISTRATION

The journey since 2011 and the transition from "head tax" to a proportional based method of funding the work of the Central Administration.

The 16th All-American Council in Seattle included a very lively debate on the appropriate funding level for work of the Central Administration. The outcome was a resolution that called for the per capita assessment to remain at \$105 for 2012 and to then be reduced proportionately each year thereafter. In addition, the Finance Committee of the Metropolitan Council also recommended several actions: (1) Re-instituting the FOS Appeal with the goal of funding national programs, (2) holding semi-annual meetings of the OCA and Diocesan Treasurers, and (3) moving towards a Proportional Giving plan on a diocese by diocese basis by 2014. There has been significant action and progress on each of these mandates:

- ***The per capital assessment:*** The per capita assessment has been decreased from the \$105 in 2012 to \$95 in 2013, \$92 in 2014 and \$90 in 2015, for a total drop of \$15 per capita or 14.3%.
- ***FOS Appeal:*** As mentioned earlier in the report, the Fellowship of Orthodox Stewards was re-instituted in 2013 as Stewards of the OCA by the Financial Development Committee, raising \$60K in 2013 and \$34K in 2014.
- ***OCA and Diocesan Treasurers Meetings:*** This group was expanded to include the Diocesan Chancellors and the other OCA officers. The initial meeting was held in Syosset in January 2012, and there have been follow-up meetings each year with the 4th Annual

Chancellors/Treasurers Meeting held on February 7, 2015. These meetings provided a starting point for the intricate transition from “head tax” to proportional giving. In addition to these annual meetings, OCA officers also have met with most of the dioceses to discuss where each one is in the process of re-educating our parishioners and in some instances teaching the biblical concept of proportional giving for the first time.

So, four years after Seattle, what are we proposing as a methodology for funding the work of the central administration?

Before presenting the Finance Resolution, there are two distinct topics that must be highlighted and understood as a basis to evaluate the proposal for funding the central administration for the next triennium.

1. WHAT WORK IS DONE AT THE CENTRAL ADMINISTRATION LEVEL?

First, the central administration is exactly that...administration of the entire Church. We are NOT a charitable organization; and our primary function is NOT to run programs. ***We administer the Church.***

Here are some interesting statistics:

- Total Annual Diocesan Operating Budgets = \$5.845 million (this includes the Diocesan and OCA Assessments, no Stewards Revenues)
- At an average annual budget of \$96,000, the total Parish Budget of the OCA = \$72 million.
- The Annual OCA Operating Budget = \$1.936 million.
- ***So, the OCA Administration = 2.7% of the total OCA budget***
- So, total Diocesan + Central Administration = 8.1% of the total OCA Budget.

What does the Central Administration do?

His Beatitude represents all of us in dealings with other Orthodox jurisdictions, often hosting other hierarchs in Syosset. **The Chancellor** handles all the clergy matters, transfers, and deals directly with ORSMA and SMPAC. **The Secretary** handles all administrative matters, communications, maintains the 501(c)(3) Group Exemption and files the appropriate reports with the IRS. He also coordinates the semi-annual Metropolitan Council meetings and ALL ITS REPORTS, travel, accommodations and meeting agendas; same for the semi-annual Holy Synod meetings and the tri-annual All-American Council. The Secretary takes care of supplying the hierarchs with liturgical needs including antimimension, unction and relics. The Chancellor and Secretary are assisted by one person, who also assists the Metropolitan. **The Treasurer** makes sure all incoming funds are recorded and receipted properly; supervises one very-part-time clerk in paying all the bills; does all the accounting and reporting; prepares reports for the Metropolitan Council, Holy Synod and All-American Council meetings; prepares all the work papers for the annual external audit; prepares the annual budget for presentation to and approval by the Metropolitan Council, and accounts for the numerous restricted endowment funds of the OCA. **The Archivist** catalogs and manages the archives of the Church in all forms, written,

photographic, video, etc. He also hosts, on a regular basis, visiting scholars who come to do research involving the archives of the Orthodox Church in America. **The External Affairs Director**, on a part-time basis, oversees communications with other Orthodox jurisdictions and also maintains relationships on behalf of the Orthodox Church in America with other ecumenical organizations. The **Communications team** consists of one part-time employee plus two consultants. They write, post and maintain the website and all its related pages, and assist the departments with their departmental sites and pages. The **ORSMA Director**, who is now on a part-time basis, receives all the initial reports of sexual misconduct allegations, performs inquiries, coordinates investigations and follows up to conclusion; works with Dioceses to provide instruction and workshops on the OCA PSP's. The **Archdeacon** serves as the personal secretary to the Metropolitan, in addition to traveling with His Beatitude to hierarchical services. The **Administrative Assistant/Assistant to the Chancellor** also assists the other officers in daily clerical tasks. The **Housekeeper** not only cleans and maintains the building, but coordinates, arranges and presents all the meals for not only the Holy Synod Meetings, but the Metropolitan Council meetings, Lesser Synod Meetings, and all the various meetings that take place at the Chancery throughout the year. In 2015 there were 7 meetings in the first 5 months; in 2014 there were a total of 16 meetings throughout the year.

In addition to these employees, there are currently nine departments, led by Chairs appointed by the Holy Synod, doing work in areas such as Chaplaincy (Military and Institutional), Youth and Young Adults, Liturgical Music and Translations, Christian Education, Christian Service and Humanitarian Aid, Missions and Evangelization, Diaconal Vocations, and Pastoral Life.

2. HOW DOES THIS RELATE TO WORK BEING DONE AT THE LOCAL AND DIOCESAN LEVELS?

The answer is that with regard to the basic administrative functions such as ORSMA, 501c(3) maintenance and filings, archiving all information pertinent to the OCA, external affairs, preparation for and successful execution of metropolitan council meetings, Holy Synod meetings, Lesser Synod meetings, All-American Council pre-conciliar meetings, there is nothing comparable at the diocesan level. With regard to the Departments, some dioceses have programs such as Missions, Charity, Youth, Music, but not as extensive a list as the Central Administration.

At the meeting of the Metropolitan Council in February 2015, the Finance Committee put forward the following resolution for funding the work of the central administration for the next three years:

“For the budget years 2016, 2017 and 2018, each diocese of the Orthodox Church in America shall annually remit its diocesan financial obligation for the work of the central administration in an amount no less than the greater of 1) the 2015 assessment, with a 4% decrease permissible in cases of diocesan need as determined by the Metropolitan Council with the approval of the Holy Synod of Bishops; or 2) 33% of total annual diocesan revenue.” This resolution was passed by the Metropolitan Council with 1 vote against and 1 abstention. The intent of the Metropolitan Council was to provide some stability to the budget of the central administration while moving the dioceses to a proportional giving methodology. However,

shortly after the Metropolitan Council meeting, several dioceses expressed their **strong** objection to the resolution, with the main problem being the **‘floor’** provided for in the resolution. Therefore, the resolution was re-worked and presented to the Holy Synod at its March 2015 meeting. The revised resolution eliminated the ‘floor’, and replaced the “flat 33% of diocesan revenue” with proportional rates for the territorial dioceses that have all those dioceses at 34% by the year 2018, and the non-territorial dioceses, along with the Diocese of Alaska and Archdiocese of Canada at 10% for the triennium. This resolution was then revised yet again at the Holy Synod retreat during the week of June 8-11, 2015.

Exhibit E portrays the details by diocese for the years 2011 through 2015. The eight territorial dioceses are presented with their annual census and assessment at the rates of \$105 per capita in 2011 and 2012, and then \$95 for 2013, \$92 for 2014 and \$90 for 2015. As you see, our census has decreased by 1,122; total assessments paid by these dioceses has decreased by \$379,335. The non-territorial dioceses, namely Alaska, Canada, Bulgarian Diocese, Romanian Episcopate, and the Albanian Archdiocese are presented with the actual contributions to the central administration. The Diocese of Alaska and Archdiocese of Canada tithe 10%. The other three dioceses make contributions based on amounts that were agreed upon quite some time ago. The 2015 Diocesan Budgets are presented in two columns: All Revenues, and w/o Fundraising. The total OCA assessment at \$90 per capita represents 46% of the total territorial diocesan revenues (excluding their stewards programs). It is this 46% that was used as a starting point in developing a formula for transitioning from the head tax to proportional giving. For 2015, the proportional rates for these dioceses range from a low of 32% in the Diocese of the South to a high of 62% in the Diocese of New York/New Jersey. The Finance Resolution takes each diocese to 34% by 2018; with those dioceses at a rate greater than the 46% average starting at 46% in 2016 and moving to 34% by 2018; those dioceses between 35% and 45% starting at their actual 2015 rate and moving to 34% by 2018; and those dioceses at or below 34% remaining at 34% for the triennium.

For the non-territorial dioceses, the proposal is that the territorial Archdiocese of Canada and Diocese of Alaska remain at the 10% tithe for the next triennium, with the agreements for the ethnic dioceses to be re-negotiated by the Holy Synod.

What does this do to the Budget of the Central Administration?

If our diocesan budgets remain similar to 2015 for the next triennium, and assuming no change in the contribution of the ethnic dioceses, by the end of 2018 the budget of the central administration will be reduced by almost \$494,000. The reductions are \$187,000 in 2016, \$151,000 in 2017 and \$156,000 in 2018. **Exhibit F** is a Recap of Expenses by Category, showing Actual 2014 and Budget 2015 figures. As you see, Salaries and Benefits represent 50% of our total budget, with Departmental Programs (including Planting Grants) at just over 10%. The Property Expenses, another 9%, are fixed, and cannot be significantly reduced unless a decision is made to sell the property and relocate the offices elsewhere. Replacing the \$494K in reduced assessment will require a combination of increased focus on fundraising through the Stewards of the OCA program, along with a major transformation in personnel, programs, travel and the basic work done by the administration.

Post 18th AAC – Now What?

The rationale in even proposing this Finance Resolution is to maintain more funding in the Dioceses/Parishes to **STRENGTHEN** and **GROW** the Church. If you decide to accept this resolution for the next three years, the work will have JUST begun. It is the mission of ALL of us to renew our commitment to the Church, and then to work at all levels, parish, diocese, national, stavropegial, to expand and bring new members in at all levels.

CONCLUSION

It continues to be an honor to serve as the Treasurer of the OCA. The past four years have been extremely challenging but at the same time deeply rewarding. The real life of this Church is at the parish level, and it has been the interaction with you all at the diocesan and parish levels that not only sustains me, but gives me great hope that with all the problems we face, there are truly marvelous things happening throughout the Orthodox Church in America. I would like to thank my brothers and sisters in Christ at the Chancery for their tremendous hard work, dedication and love. I would also like to thank His Beatitude, Metropolitan TIKHON, for his quiet strength and leadership, and for his advice and guidance during some of the most trying moments. We have much work to do, but if we work together and understand that we are all in this together, I am confident that we can succeed and accomplish great things.

The Orthodox Church in America
Condensed Balance Sheet
For the Years 2006 - 2014

Exhibit A

	AUDITED								Audit in Progress
	2006	2007	2008	2009	2010	2011	2012	2013	2014
ASSETS									
Cash	\$ 680,637	\$ 679,697	\$ 430,904	\$ 360,761	\$ 464,805	\$ 744,298	\$ 939,806	\$ 930,189	\$ 979,295
Accounts, Notes & Bequests Receivable	\$ 95,056	\$ 308,644	\$ 88,476	\$ 117,501	\$ 130,051	\$ 1,092,481	\$ 765,795	\$ 685,083	\$ 897,051
Prepaid and Inventory	\$ 113,187	\$ 28,877	\$ 23,708	\$ 6,677	\$ 13,017	\$ 16,235	\$ 14,742	\$ 23,027	\$ 24,836
Investments	\$ 2,941,212	\$ 2,784,831	\$ 1,640,669	\$ 1,446,382	\$ 1,378,306	\$ 1,189,570	\$ 1,129,770	\$ 1,053,631	\$ 1,060,573
Land, building and equipment	\$ 761,615	\$ 416,638	\$ 396,942	\$ 344,491	\$ 319,387	\$ 323,922	\$ 291,271	\$ 259,762	\$ 296,887
Total Assets	\$ 4,991,707	\$ 4,218,687	\$ 2,580,699	\$ 2,275,812	\$ 2,325,566	\$ 3,366,506	\$ 3,141,384	\$ 2,951,692	\$ 3,258,664
LIABILITIES									
Accounts payable and accrued expenses	\$ 207,452	\$ 218,019	\$ 193,360	\$ 355,380	\$ 61,987	\$ 134,935	\$ 121,201	\$ 125,756	\$ 88,776
Loans Payable	\$ 1,727,026	\$ 1,096,892	\$ 1,015,761	\$ 912,168	\$ 802,678	\$ 684,212	\$ 39,616	\$ 35,925	\$ 43,573
Deferred Revenue (AAC Assessments)	\$ -	\$ -	\$ -	\$ -	\$ 7,447	\$ -	\$ -	\$ -	\$ 280,763
Deferred Comp./Retirement Obl	\$ 151,863	\$ 66,138	\$ -	\$ -	\$ -	\$ 48,819	\$ 68,250	\$ 54,178	\$ 42,778
Annuity & unitrust agreements	\$ 521,213	\$ 830,579	\$ 624,234	\$ 537,738	\$ 469,811	\$ 368,114	\$ 286,014	\$ 184,321	\$ 184,321
Total Liabilities	\$ 2,607,554	\$ 2,211,648	\$ 1,833,375	\$ 1,805,306	\$ 1,341,923	\$ 1,256,080	\$ 535,081	\$ 400,180	\$ 640,211
NET ASSETS	\$ 1,984,153	\$ 2,007,039	\$ 747,324	\$ 470,506	\$ 983,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,618,453 (1)
Total Liabilities and Net Assets	\$ 4,991,707	\$ 4,218,687	\$ 2,580,699	\$ 2,275,812	\$ 2,325,566	\$ 3,366,506	\$ 3,141,384	\$ 2,951,692	\$ 3,258,664
(1) Unrestricted Net Assets (a)				\$ (1,351,845)	\$ (843,460)	\$ (505,127)	\$ 77,922	\$ 25,891	\$ 90,473
Temporarily Restricted Net Assets (b)				\$ 795,606	\$ 808,026	\$ 1,536,124	\$ 1,506,421	\$ 1,502,372	\$ 1,502,372
Permanently Restricted Net Assets				\$ 1,026,745	\$ 1,019,075	\$ 1,020,429	\$ 1,021,960	\$ 1,023,249	\$ 1,025,608
				\$ 470,506	\$ 983,641	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,618,453

(a) In 2012 the OCA received an unrestricted bequest in the amount of \$460,000.

(b) In 2011 the OCA received a temporarily restricted bequest for Missions in the amount of \$969,000.

Orthodox Church in America
 Condensed Statement of Activities
 For the Years ended 12/31/2006 through 12/31/14

Exhibit B

	From 10th AAC Seattle 2011				From 2011-2013 Audit Reports				Preliminary	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	
INCOME										
Diocean Assessments	\$ 2,673,712	\$ 2,630,054	\$ 2,538,076	\$ 2,453,710	\$ 2,404,989	\$ 2,304,772	\$ 2,281,079	\$ 2,001,762	\$ 1,945,943	
All-American Council	\$ -	\$ 476	\$ 243,171	\$ -	\$ -	\$ 313,415	\$ 68,761	\$ -	\$ -	
Publications	\$ 72,807	\$ 41,401	\$ 36,152	\$ 12,053	\$ 7,704	\$ 3,117	\$ 1,095	\$ 2,390	\$ -	
FOG/Stewards of the OCA	\$ 142,672	\$ 127,625	\$ 23,221	\$ 135,704	\$ 44,483	\$ 22,519	\$ 10,080	\$ 60,435	\$ 34,628	
Charity	\$ 133,562	\$ 77,447	\$ 44,044	\$ 10,567	\$ 3,592	\$ 7,665	\$ 12,556	\$ 1,487	\$ 1,966	
Missions	\$ 76,565	\$ 108,086	\$ 50,703	\$ 38,975	\$ 59,198	\$ 972,359	\$ 5,251	\$ 27,618	\$ 3,599	
Seminary	\$ 48,437	\$ 53,525	\$ 53,101	\$ 2,239	\$ 4,708	\$ 1,689	\$ 1,199	\$ 27,144	\$ 10,363	
General Contributions	\$ 30,116	\$ 61,404	\$ 40,473	\$ 45,815	\$ 32,800	\$ 11,491	\$ 464,682	\$ 133,092	\$ 74,014	
Theological Education	\$ 36,365	\$ 28,372	\$ 6,050	\$ 580	\$ -	\$ -	\$ -	\$ -	\$ -	
Yearbook & Calendar	\$ 1,573	\$ 2,750	\$ 1,191	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 435	
North America Saints Project	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000	\$ -	\$ -	\$ -	
Misc Other	\$ 39,568	\$ 7,144	\$ 63,032	\$ 31,254	\$ 15,484	\$ 17,810	\$ 4,353	\$ 66,195	\$ 30,735	
Gain on sale of Residence	\$ -	\$ 158,699	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Income	\$ 3,295,317	\$ 3,296,983	\$ 3,099,214	\$ 2,730,977	\$ 2,572,928	\$ 3,665,037	\$ 2,844,056	\$ 2,320,123	\$ 2,099,683	
EXPENSES										
Programs & Ministries (1)	\$ 589,071	\$ 541,480	\$ 668,509	\$ 246,885	\$ 131,472	\$ 198,262	\$ 247,094	\$ 235,290	\$ 220,072	
General Administration	\$ 2,459,911	\$ 2,215,138	\$ 2,223,011	\$ 1,893,918	\$ 1,642,908	\$ 1,746,474	\$ 1,705,858	\$ 1,905,717	\$ 1,705,125	
Professional Fees**	\$ 430,980	\$ 287,266	\$ 556,260	\$ 660,566	\$ 260,623	\$ 274,050	\$ 281,208	\$ 213,294	\$ 70,114	
All-American Council	\$ -	\$ -	\$ 243,847	\$ -	\$ 13,843	\$ 253,508	\$ 124,070	\$ 11,139	\$ 39,671	
Total Expenses	\$ 3,459,962	\$ 3,043,884	\$ 3,691,427	\$ 3,001,369	\$ 2,068,846	\$ 2,492,294	\$ 2,357,930	\$ 2,365,440	\$ 2,034,982	
Changes in Net Assets										
From Operations	\$ (164,645)	\$ 253,099	\$ (592,213)	\$ (270,392)	\$ 504,082	\$ 1,172,743	\$ 481,126	\$ (45,317)	\$ 64,701	
Other Changes										
Interest and Dividend Income	\$ 181,764	\$ 39,697	\$ 45,085	\$ 10,278	\$ 8,524	\$ 2,954	\$ 9,511	\$ 6,397	\$ 13,415	
Realized & unrealized gains	\$ 43,824	\$ 102,924	\$ (690,304)	\$ (16,704)	\$ 531	\$ 3,172	\$ 11,240	\$ 20,376	\$ 5,501	
Distributions (2)	\$ -	\$ (16,344)	\$ (22,283)	\$ -	\$ -	\$ (28,835)	\$ (16,000)	\$ (36,247)	\$ (16,678)	
Total Other Changes	\$ 225,588	\$ 126,277	\$ (667,502)	\$ (6,426)	\$ 9,055	\$ (22,709)	\$ 4,751	\$ (9,474)	\$ 2,340	
Change in Net Assets	\$ 80,943	\$ 379,376	\$ (1,259,715)	\$ (276,818)	\$ 513,137	\$ 1,150,034	\$ 495,877	\$ (54,791)	\$ 66,941	
Audit Adjustments	\$ -	\$ (356,490)	\$ -	\$ -	\$ -	\$ (23,251)	\$ -	\$ -	\$ -	
Beginning Net Assets	\$ 1,923,210	\$ 1,994,153	\$ 2,007,039	\$ 747,324	\$ 470,506	\$ 963,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	
Ending Net Assets	\$ 1,984,153	\$ 2,007,039	\$ 747,324	\$ 470,506	\$ 983,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,618,453	
**Professional Fees										
Legal Fees	\$ 311,665	\$ 100,225	\$ 220,017	\$ 453,627	\$ 141,436	\$ 139,489	\$ 158,829	\$ 155,367	\$ 24,310	
Legal Settlement	\$ -	\$ -	\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ -	\$ -	
Audit Fees	\$ 36,877	\$ 80,058	\$ 116,504	\$ 59,785	\$ 49,500	\$ 49,920	\$ 39,300	\$ 38,200	\$ 34,000	
Professional Fees - Other	\$ 62,438	\$ 106,983	\$ 219,739	\$ 97,154	\$ 69,687	\$ 84,641	\$ 83,079	\$ 19,727	\$ 11,804	
	\$ 430,980	\$ 287,266	\$ 556,260	\$ 660,566	\$ 260,623	\$ 274,050	\$ 281,208	\$ 213,294	\$ 70,114	

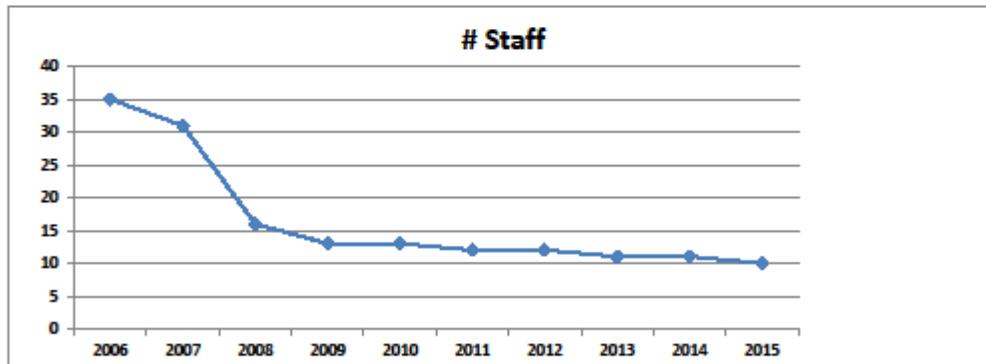
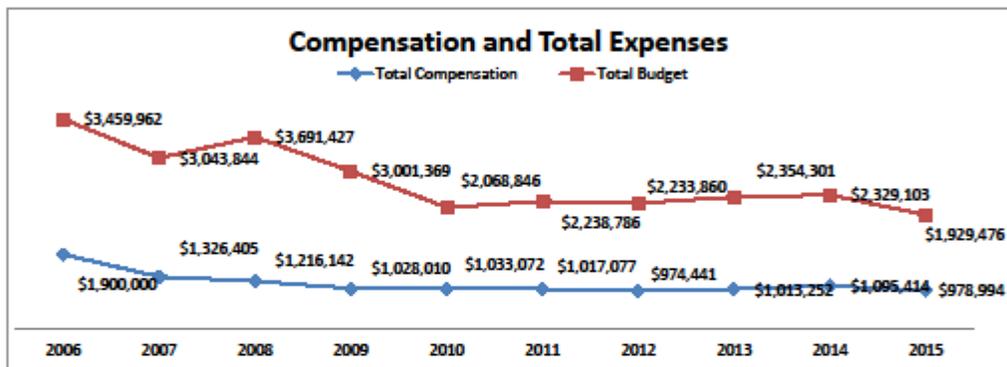
(1) Programs & Ministries: Includes the Departments, Missions and Planting Grants.
 (2) Distributions from Charity and Seminary Funds

2013 Increase in Gen and Admin:	
- One time expense as OCA Assumed Met JONAH debt to DOS	\$ 42,798
- Enthronement of Met Tikhon	\$ 38,806
- New Program - Psych Testing for all Ordination Candidates	\$ 30,742
- Full Implementation of ORSMA	\$ 89,286
Increase in G & A expenses over 2012	\$ 201,612

**ORTHODOX CHURCH IN AMERICA
SALARIES AND BENEFITS - 2006 THROUGH 2015**

Exhibit C

	<u># Staff</u>	<u>Total Compensation</u>		<u>Total Budget</u>	<u>Annual</u> <u>Comp Reduction</u>	<u>Professional/</u> <u>Legal Fees</u>
2006	35	\$ 1,900,000	55%	\$ 3,459,962	\$ -	\$ 410,980
2007	31	\$ 1,326,405	44%	\$ 3,043,844	\$ 573,595	\$ 287,266
2008	16	\$ 1,216,142	33%	\$ 3,691,427	\$ 110,263	\$ 556,260
2009	13	\$ 1,028,010	34%	\$ 3,001,369	\$ 188,132	\$ 860,566
2010	13	\$ 1,033,072	50%	\$ 2,068,846	\$ (5,062)	\$ 260,623
2011	12	\$ 1,017,077	45%	\$ 2,238,786	\$ 15,995	\$ 274,050
2012	12	\$ 974,441	44%	\$ 2,233,860	\$ 42,636	\$ 281,208
2013	11	\$ 1,013,252	43%	\$ 2,354,301	\$ (38,811)	\$ 213,294
2014	11	\$ 1,095,414	47%	\$ 2,329,103	\$ (82,162)	\$ 70,114
2015	10	\$ 978,994	51%	\$ 1,929,476	\$ 116,420	\$ 120,000
					\$ 921,006	\$ 3,334,361



Orthodox Church in America
Central Administration Personnel and Costs
For the year 2015

Exhibit D

Full Time Equivalency		Position	Total from 2011 Presentation	2015 Costs					Total
				Salary	SECA/ FICA	Insurances	Pension		
2011	2015								
1.0	1.0	Metropolitan	\$ 107,732	\$ 75,420	\$ 11,539	\$ 10,210	\$ 6,034	\$ 103,203	
1.0	1.0	Chancellor	\$ 136,400	\$ 90,250	\$ 13,808	\$ 27,730	\$ 7,220	\$ 139,008	
1.0	1.0	Secretary	\$ 136,400	\$ 90,250	\$ 13,808	\$ 27,730	\$ 7,220	\$ 139,008	
0.5	0.5	Treasurer	\$ 66,895	\$ 51,134	\$ 3,912	\$ 3,860	\$ 4,091	\$ 62,996	
1.0	0.0	Assistant to Metropolitan (was Greg Sulich)	\$ 66,452	\$ -	\$ -	\$ -	\$ -	\$ -	
0.5	1.0	Admin Asst/Assistant to Chancellor	\$ 37,861	\$ 45,000	\$ 3,443	\$ 725	\$ 3,600	\$ 52,768	
1.0	0.0	Accts Payable Assistant (was Jessica Linke)	\$ 66,667	\$ -	\$ -	\$ -	\$ -	\$ -	
0.5	0.0	Archdeacon/Projects Manager (Note 1)	\$ 46,901	\$ -	\$ -	\$ -	\$ -	\$ -	
1.0	1.0	Personal Assistant to Metropolitan	\$ 43,850	\$ 30,000	\$ 2,295	\$ 10,200	\$ 2,400	\$ 44,895	
1.0	1.0	Housekeeper	\$ 73,842	\$ 46,350	\$ 3,546	\$ 9,300	\$ 3,708	\$ 62,904	
1.0	1.0	Archivist	\$ 93,387	\$ 63,548	\$ 4,861	\$ 27,395	\$ 5,084	\$ 100,888	
1.0	0.0	TOC Editor/Web Editor (Note 1)	\$ 60,484	\$ -	\$ -	\$ -	\$ -	\$ -	
0.5	0.5	External Affairs Director	\$ 37,885	\$ 30,610	\$ 4,683	\$ 224	\$ 2,803	\$ 38,320	
1.0	1.0	Rector of St Catherine's	\$ 42,507	\$ 30,000	\$ 4,590	\$ 13,785	\$ 2,767	\$ 51,142	
0.0	0.1	Accounting Assistant	\$ -	\$ 5,722	\$ 438	\$ 100	\$ 458	\$ 6,718	
0.1	0.0	Misc Clerical Assistance	\$ 6,018	\$ 2,500	\$ 191	\$ 100	\$ -	\$ 2,791	
0.0	0.6	ORSMA Director	\$ -	\$ 55,000	\$ 4,213	\$ 9,382	\$ 4,400	\$ 72,995	
0.0	0.25	Communications Assistant	\$ -	\$ 20,000	\$ 1,532	\$ 400	\$ 1,600	\$ 23,532	
12.1	10.0	Totals	\$ 1,023,281	\$ 635,784	\$ 72,859	\$ 141,141	\$ 51,385	\$ 901,169	

Note 1 These are now "stipend" positions with no benefits:
Archdeacon/Secretary to Metropolitan
TOC Editor/Web Editor

\$ 24,000
\$ 53,825
\$ 978,994

*Orthodox Church in America
Recap of Expenses by Category*

	2015 Budget		2014 Actual	
Salaries/payroll taxes***	38.9%	\$ 754,091	\$ 786,440	42.7%
Ministries, including planting grants	10.5%	\$ 203,150	\$ 190,306	10.3%
Benefits	10.2%	\$ 198,409	\$ 178,051	9.7%
Property-utills, ins, taxes, maintenance	9.0%	\$ 174,141	\$ 160,987	8.7%
Travel, lodging, conferences*	8.8%	\$ 171,090	\$ 158,131	8.6%
Legal, Audit, Consulting Fees**	9.3%	\$ 179,200	\$ 132,631	7.2%
Stipends, including St Catherines***	6.1%	\$ 118,942	\$ 105,186	5.7%
Other - dues, supplies, misc	4.4%	\$ 85,792	\$ 80,702	4.4%
Telephone, equipment leasing	2.7%	\$ 51,960	\$ 48,751	2.6%
		<u>\$ 1,936,775</u>	<u>\$ 1,841,185</u>	<u>100%</u>

* 2015 includes additional for HS and MET travel

** 2015 Includes \$50K for Legal and \$23.4K for part-time development

*** 2015 includes Fr Matusiak as consultant, not employee/

JOB DESCRIPTION OF THE DIRECTOR OF EXTERNAL AFFAIRS AND INTERCHURCH RELATIONS

SUPERVISORY AND JOB CONTROLS

Is assigned in terms of general objectives. Technical guidance is neither sought nor given, but the Metropolitan and Holy Synod is frequently apprised of progress, made aware of controversial or sensitive issues, and is consulted in advance on actions that may impact the policies of the Church.

JOB SUMMARY

As the principal Ecumenical Officer of the OCA, manages relations with other Orthodox churches, other Christian churches and bodies, Christian ecumenical organizations, other religious communities, interfaith organizations, and relevant government offices

MAJOR DUTIES

1. Promotes worldwide interfaith understanding and communicates the Orthodox Christian message to a wide variety of individuals and groups. Participates in missions, delegations, and ecumenical conferences. Serves as a member of inter-church and governmental boards and committees. Gives formal and informal lectures and talks.
2. Represents the Church in a variety positions on important commissions and committees. Representative examples of these bodies include: SCOBA Study and Planning Commission; International Orthodox Christian Charities; World Council of Churches (WCC) Central Committee; US Conference for the WCC; Christian Churches Together in the USA. In these bodies, absorbs the messages of the other members and conveys the Orthodox viewpoint and perspective. May serve as an officer of the organizations, if elected or appointed. Drafts documents for the Metropolitan and the Holy Synod of Bishops conveying the Church's position on issues that may be sensitive or controversial.
3. Serves as Editor of *The Orthodox Church*, regularly contributing the editorial. Consults with the Metropolitan to ensure that the editorial viewpoint is consistent with the policies of the Church or its Primate. Consults with the Managing Editor, when requested, on various articles submitted by contributors and on the overall content of the publication.

Performs Other Duties as Assigned

Job Requirements

1. Broad and intense knowledge of Orthodox theology and the OCA mission and spiritual message.
2. Ability to absorb complex information rapidly and to apply it with little or no preparation to a variety of sensitive situations.
3. A temperament that enables defending the Orthodox viewpoint and expressing serious disagreement respectfully and without hostility, while simultaneously building good relations.
4. Ability to communicate orally and in writing clearly, concisely, and persuasively on complex and sensitive issues.

REPORT OF THE DIRECTOR OF EXTERNAL AFFAIRS AND INTERCHURCH RELATIONS

Protopresbyter Leonid Kishkovsky

OVERVIEW

The Statute of the Orthodox Church in America refers to the external relations of our Church in two places. 1) **Article II on the Holy Synod** – Among the matters within the jurisdiction and competence of the Holy Synod, Section 7(1) identifies . . . *Establishment of general policies in relation to other Orthodox Churches and non-Orthodox religious bodies.* 2) **Article IV on the Metropolitan** in Section 1 states that the Metropolitan *supervises the internal and external welfare of the Church and represents it in its relations with other Orthodox Churches, religious organizations, and secular authorities.*

The Office of External Affairs and Interchurch Relations informs the Metropolitan and the Holy Synod on developments in the Church's relations with other Orthodox Churches, religious organizations, and secular authorities. Under the direction of the Metropolitan the Office implements the policies established by the Holy Synod. The Office is composed of His Grace Alexander, Bishop of Toledo (Bulgarian Diocese), who acts as Episcopal Liaison, and Protopresbyter Leonid Kishkovsky, Director of External Affairs and Interchurch Relations. Persons with expertise and competence represent the Church in Orthodox, ecumenical, interreligious, and government contexts, and/or are called upon as consultants. The contributions of Archpriest Nazari Polataiko, Professor Paul Meyendorff, Protodeacon Serge Kapral, and Mrs. Arlene Kallaur should be gratefully acknowledged.

The external relations of the Orthodox Church in America constitute part of the witness of our Church and contribute to “expanding the mission.” This report is a summary of the external relations, offering an extensive overview of our Church's presence and voice in a spectrum of settings.

HIGHLIGHTS SINCE THE 16TH ALL-AMERICAN COUNCIL

The presence and voice of the Orthodox Church in America have been strengthened in the most recent period by our Primate. In December 2014 His Beatitude Metropolitan Tikhon made his visit to the Patriarchate of Moscow, concelebrating the Liturgy with His Holiness Patriarch Kirill in the Uspensky (Dormition) Cathedral of the Kremlin, visiting the Donskoy Monastery to venerate the relics of St. Patriarch Tikhon and engaging in official dialogue with the Patriarch. During the visit the US Ambassador to Russia gave a reception in honor of Metropolitan Tikhon and the delegation accompanying him, and the Ambassador of Canada attending the Liturgy celebrated by our Metropolitan at St. Catherine's Representation Church in Moscow.

Upon returning to the United States our Metropolitan concelebrated the Liturgy with His Beatitude Patriarch John X of Antioch in Washington, DC. Soon thereafter the Metropolitan travelled to Istanbul at the head of a delegation representing St. Vladimir's Seminary. This journey, officially a visit to Halki, the historic theological school of the Patriarchate of Constantinople, included a meeting with His All Holiness the Ecumenical Patriarch Bartholomew.

In April our Metropolitan participated in a historic commemoration of the 100th Anniversary of the Armenian Genocide. This event took place in Yerevan, the capital of Armenia, and in Holy Etchmiadzin, the see of the Supreme Catholicos of All Armenians, Karekin II. From Armenia Metropolitan Tikhon travelled to Tbilisi, making his official visit to the Catholicos-Patriarch of All Georgia, Ilia II, and the Church of Georgia. In May our Metropolitan participated in the Washington, DC, commemoration of the Armenian Genocide at the National Cathedral.

Finally, in June Metropolitan Tikhon travelled again to Istanbul, this time together with the Executive Committee of the Assembly of Canonical Orthodox Bishops in the United States. The visiting hierarchs from the United States participated in a conversation with the Ecumenical Patriarch on the achievements and goals of the Assembly of Canonical Bishops in the US.

This brief account of Metropolitan Tikhon's external affairs ministry as the Primate of the Orthodox Church in America testifies to the ongoing and strengthening voice and witness of our Church.

Members of the Holy Synod also make their contributions to the external relations of the Orthodox Church in America. For example, Archbishop Benjamin of San Francisco represented our Church at the enthronement of Metropolitan Rastislav of the Church of the Czech Land and Slovakia, Bishop Alexander of Toledo participated in the funeral services for Metropolitan Volodymyr of Kiev, Archbishop Michael of New York and Archbishop Irene of Ottawa participated in the enthronement of Metropolitan Onufry as Metropolitan of Kyiv, Archbishop Mark of Philadelphia took part in the Russian Orthodox Church's jubilee celebration of St. Sergius of Radonezh, and Archbishop Irene of Ottawa will represent our Church in the Moscow celebrations of St. Vladimir of Kiev immediately after the conclusion of the 18th All American Council.

In the external relations of the Orthodox Church in America our task, everywhere and always, is to testify to our identity and mission as a North American Orthodox Church, and to our conviction and experience that we are "truly Orthodox and truly American."

ASSEMBLY OF CANONICAL ORTHODOX BISHOPS IN THE UNITED STATES

Secretariat

PDN Peter Danilchik

Canonical Affairs

Fr. John Erickson
Fr. Alexander Rentel

Canonical Regional Planning

Metropolitan Tikhon

Church and Society

Fr. John Breck

Clergy Matters

Fr. Eric G. Tosi
Fr. Ian Pac-Urar

Ecumenical Relations

Archbishop Melchisedek
Fr. Leonid Kishkovsky

Financial Affairs

PDN Peter Danilchik
Matushka Mary Buletza-Breton

Legal Affairs

Judge E.R. Lanier
Thaddeus Wojcik

Liturgy

Archbishop Benjamin
Fr. Paul Lazor
Dr. Paul Meyendorff

Military Chaplaincy

Archbishop Nikon
Fr. Theodore Boback
Fr. Jerome Cwiklinski

Monastic Communities

Metropolitan Tikhon
Mother Gabriella

Pastoral Practice

Archbishop Mark
Fr. John Jillions
Fr. Ian Pac-Urar

Theological Education

Archbishop Michael
Bishop Alexander
PDN Peter Danilchik
Fr. John Behr
Fr. Chad Hatfield
Fr. Steven Voytovich

Youth

Bishop Ireneu
PDN Joseph Matusiak
Andrew Boyd
Michael Pacurar

ASSEMBLY OF CANONICAL ORTHODOX BISHOPS IN CANADA

Archbishop Nathaniel (Romanian Episcopate)
Archbishop Ireneu (Archdiocese of Canada)

ORTHODOX**ST. CATHERINE'S REPRESENTATION CHURCH IN MOSCOW**

St. Catherine's Church serves as the presence and voice of the Orthodox Church in America in Moscow. Archimandrite Alexander (Pihach) as Dean of St. Catherine's Church and as

Representative of the Orthodox Church in America to the Moscow Patriarchate, carries a double responsibility – pastor of the St. Catherine’s Parish and diplomatic representative of the Orthodox Church in America to the Patriarchate of Moscow. Several other Orthodox patriarchates and autocephalous churches also have their Representation Churches in Moscow.

INTERNATIONAL ORTHODOX CHRISTIAN CHARITIES

Relief and Development agency endorsed by the Assembly of Bishops (previously by the Standing Conference of Canonical Orthodox Bishops.) The Orthodox Church in America, together with the Greek Orthodox Archdiocese and the Antiochian Orthodox Christian Archdiocese, were instrumental in the creation of this pan-Orthodox agency. Significant work has been done by IOCC in Russia, Bosnia, Serbia, Ethiopia, Syria and Lebanon, Israel and Palestine. Domestic disaster-response has been done in the US. Through partnerships with other relief and development agencies IOCC has responded to natural disasters in Asia and other regions. IOCC headquarters is in Baltimore, Maryland. Fr. Leonid Kishkovsky is the OCA member of the Board of Directors, and chair of IOCC’s Church Relations Committee.

ORTHODOX CHRISTIAN MISSION CENTER

Mission and Evangelism agency endorsed by the Assembly of Bishops (previously by the SCOBA). OCMC has sent mission teams around the world and has supported mission and evangelism work by the local Orthodox churches. OCMC headquarters is located in St. Augustine, Florida. Orthodox Church America members of the Board of Directors are Frs. Matthew Tate, John Parker, Ted Pisarchuk, and Mrs. Elizabeth Slanta.

CONSULTATIONS AND DIALOGUES

NORTH AMERICAN ORTHODOX – CATHOLIC THEOLOGICAL CONSULTATION

This fruitful theological consultation continues to meet two times a year, building on the record of dialogue and consultation over several decades – in 2015 the consultation celebrates its 50th year, making it the world’s longest uninterrupted ecumenical dialogue. Representing the OCA are Bishop Alexander of Toledo, Fr. John Erickson, and Dr. Paul Meyendorff.

ST. IRENAEUS ORTHODOX-CATHOLIC WORKING GROUP

This is an informal international dialogue - now beginning its second decade. Dr. Paul Meyendorff participates by invitation.

CONSULTATION WITH THE ANGLICAN CHURCH OF NORTH AMERICA

This dialogue is exploratory – with the blessing of the Holy Synod of the OCA the goal is to identify areas of theological agreement and disagreement on the road to understanding one

another better. There is no predicting where this consultation will lead. The OCA participants are Archbishop Melchisedek, Frs. Leonid Kishkovsky, Chad Hatfield, John Pierce, and John Parker.

LAUSANNE ORTHODOX INITIATIVE

The Lausanne Movement, an Evangelical network, has committed to dialogue with the Orthodox Churches. Participation in a series of consultations is by invitation. In 2013 the first consultation was held in Albania, hosted by His Beatitude Archbishop Anastasios at St. Vlash Monastery. Fr. Leonid Kishkovsky attended to present a paper. In 2014 the second consultation was held – once again in Albania. Fr. Eric Tosi presented a paper. In 2015 the third consultation will be held in Helsinki. Both Frs. Leonid Kishkovsky and Eric Tosi have been invited.

WORKING GROUP ON ORTHODOX THEOLOGICAL EDUCATION

An international and inter-Orthodox working to bring coherence to theological education curricula in light of Europe-wide standards. This is particularly important for theological schools in former communist societies, where state accreditation for theological schools has not been secured. The St. Vladimir's experience in strategic planning and curriculum development has drawn particular interest. Dr. Paul Meyendorff represents both the OCA and SVS in this process.

ORTHODOX WITNESS IN THE PUBLIC ARENA

MARCH FOR LIFE

OCA bishops, led by the primate, together with OCA clergy and laity, have been instrumental in bringing the Orthodox Christian voice and presence to the annual March for Life in Washington, DC. In the course of many years the Primate of the OCA has given the Orthodox prayer at the big public event. In 2014 and 2015 the Assembly of Canonical Bishops has become the Orthodox profile at the March for Life, with Greek Orthodox hierarchs speaking on behalf of the Assembly. The OCA participation remains key to the Orthodox involvement in the March for Life. Over the years Fr. John Kowalczyk has been the standard-bearer in ensuring Orthodox inclusion in the organization of the March for Life.

ECUMENICAL

WORLD COUNCIL OF CHURCHES

Global ecumenical organization in which all Orthodox Churches (with the exception of Georgia and Bulgaria) participate as members. Bishop Alexander of Toledo is the OCA member of the Central Committee. Dr. Paul Meyendorff is member of Faith and Order.

NATIONAL COUNCIL OF THE CHURCHES OF CHRIST IN THE USA (NCC)

National ecumenical organization in which the key Eastern Orthodox member churches are the Greek Orthodox Archdiocese and the Orthodox Church in America. The Oriental Orthodox Churches participating in the NCC are the Armenian Church, the Syriac Orthodox Church of Antioch, and the Coptic Orthodox Church. Fr. Leonid Kishkovsky serves on the governing bodies (Executive Committee and Governing Board), having served as the first Orthodox President of the NCC in the early 1990s. PDN Serge Kapral from time to time is OCA representative at NCC meetings. Archpriest Peter Baktis and Matushka Valerie Zahirsky have also contributed of their time and knowledge in representing our Church in NCC events.

CHRISTIAN CHURCHES TOGETHER IN THE USA (CCT)

National Christian forum organized along the lines of five “families” – 1) Eastern and Oriental Orthodox; 2) Catholic; 3) African American; 4) Historic Protestant; 5) Pentecostal and Evangelical. All the major Christian streams in the US are represented, making this the most inclusive Christian forum in the US. Fr. Leonid Kishkovsky served as Orthodox President (each of the five families elects a President) and as Moderator of the Steering Committee for several years. After rotating off the Steering Committee as the rules require, Fr. Kishkovsky has been asked to return to the Steering Committee. PDN Serge Kapral from time to time represents the OCA.

CHURCH WORLD SERVICE

US ecumenical relief and development agency. Was previously part of the National Council of Churches. Now is an administratively autonomous organization, in partnership with member churches of the NCC. Domestic relief work assists people in communities by natural disasters and partners with the US government in resettling refugees. In the global context CWS assists people and communities devastated by wars and natural disasters – often in partnership with the US government. The OCA representative is Mrs. Arlene Kallaur.

CANADIAN COUNCIL OF CHURCHES

The Orthodox Church in America’s Archdiocese of Canada is a member of the Canadian Council of Churches. The 25 member churches represent the Anglican, Eastern and Oriental Orthodox, Protestant and Roman Catholic traditions. Archpriest Cyprian Hutcheon serves as vice-president of the CCC.

INTERFAITH

RELIGIONS FOR PEACE (FORMERLY CALLED WORLD CONFERENCE OF RELIGIONS FOR PEACE)

Global interfaith organization and network for promoting peace and peace-making. Played a constructive role in several conflict regions in the Balkans, Africa, Asia, and the Middle East. Fr. Kishkovsky was elected Vice Moderator at the 1999 Assembly in Amman, and Moderator at the 2006 Assembly in Kyoto. After concluding his term as Moderator in 2013, he was elected Honorary President.

RELIGIONS FOR PEACE USA

The Religions for Peace network in the USA, offering a forum for interfaith conversations and dialogues in American society. Fr. Kishkovsky served a Moderator of Religions for Peace for some ten years, and currently is a member of the large group of Presidents.

APPEAL OF CONSCIENCE

An interfaith foundation created and led by Rabbi Arthur Schneier of New York. The organization played a valuable role in relations with religious communities in communist societies, and in their relations with their respective governments. During the war in Bosnia visits by the Appeal to Belgrade, Zagreb, Sarajevo, and Pristina attempted to bring political and religious leaders to the table to bring violence to an end. The Appeal succeeded in bringing the US State Department to the realization that religion and religious communities should not be ignored in international relations. As a Trustee of the Appeal of conscience, Fr. Kishkovsky has travelled with delegations to the Soviet Union and Russia, Croatia, Serbia, Bosnia, Kosovo, Turkey, Austria, and Switzerland.

FOREIGN POLICY

COUNCIL ON FOREIGN RELATIONS (CFR)

Non-partisan body for foreign policy studies, with offices in New York and Washington, DC. On a regular basis members are invited to meet with political leaders (presidents, prime ministers, foreign ministers), civil society and human rights activists, scholars with expertise in issues involved in crises and conflicts around the world, US diplomats, legislators, and economists. CFR organizes an annual workshop on Religion and Foreign Policy. Fr. Kishkovsky was nominated by Religions for Peace for election to the CFR and continues as a member on behalf of the Orthodox Church in America

CURRENT STATE OF RELATIONS WITH ORTHODOX CHURCHES

In December 2014 His Beatitude Metropolitan Tikhon met with three Orthodox Patriarchs.

1. The meeting with Patriarch Kirill of Moscow took place in the context of His Beatitude's official protocol visit at the head of a delegation to the Russian Orthodox Church. The official meeting with Patriarch Kirill included a formal greeting in the Patriarchal residence in Danilovsky Monastery, exchange of views, lunch with further discussion, and finally concelebration of the Divine Liturgy for the Feast of the Entrance of the Theotokos into the Temple in the Uspensky (Dormition) Cathedral in the Kremlin. All indications are that the period of tension and difficulty in relations connected with the retirement of Metropolitan Jonah has been overcome. His Beatitude is seen in the Moscow Patriarchate as a serious, spiritual, and responsible church leader.

2. The meeting with Patriarch John of Antioch took place at the Patriarchal Liturgy in Washington, DC. The encounter opened the door to a visit by His Beatitude to Lebanon at a future date.

3. The meeting with the Ecumenical Patriarch took place in the context of a St. Vladimir's Seminary visit to Halki. His Beatitude traveled to Halki as President of SVS. This opened the door to further conversations between the OCA and Constantinople, overcoming the rejection of such dialogue since 2009.