

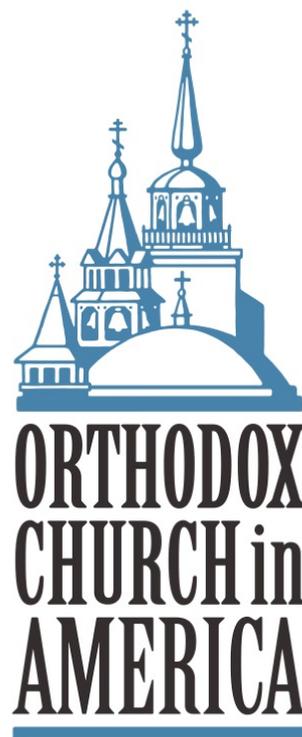
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# METROPOLITAN COUNCIL of the ORTHODOX CHURCH IN AMERICA

REPORTS  
2021 Fall Session

Thursday, September 30, 2021  
Conducted by video conference

Monday, October 18 – Tuesday, October 19, 2021  
Sheraton Cleveland Airport Hotel, Cleveland, OH



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**AGENDA**  
**REGULAR FALL 2021 SESSION OF THE METROPOLITAN COUNCIL**  
**October 18-19, 2021**  
**Cleveland, OH**

The Metropolitan Council of the Orthodox Church in America will meet in person for its Regular Fall 2021 Session, with His Beatitude Metropolitan Tikhon presiding, on Monday, October 18-Tuesday, October 19, 2021, at the Sheraton Cleveland Airport Hotel, 5300 Riverside Dr., Cleveland, OH 44135.

*Monday, October 18, 2021*

Opening Moleben

**1. Session I (2:30-3:30p)**

*Preliminary Matters* (Call to Order; Review of Agenda; Roll Call; Approval of Minutes of the Spring 2021 Sessions)

Report of His Beatitude Metropolitan Tikhon

**2. Session II (4:00-5:45p)**

Report of the Chancellor

ORSMA

OCF

Thriving in Ministry and Peer Learning Groups

Legal Committee Report

Property and Landings Committee

*Tuesday, October 19, 2021*

**3. Session III (8:30-10:00a)**

Report of the Secretary

SMPAC

Archives

Communications

Departments

AAC

4. **Session IV (10:30a-12:00p)**  
Treasurer's Report  
Pension Plan Regular Report

5. **Session V (2:00-3:30p)**

Pension Plan Discussion (continued from September 30, 2021)

6. **Session VI (4:00-5:45p)**

Pension Discussion (continued from September 30, 2021)

# Metropolitan Council Meeting

Autumn 2021

October 18, 2021

## Report of the Metropolitan

- Welcome.* I welcome all of you to the Autumn Meeting of the Metropolitan Council—and to our first in-person gathering since February of 2020. When we last met on Long Island, we were on the verge of experiencing the full thrust of the global health crisis which would consume our attention and upend our lives for the next twenty months. Now, we gather here in Cleveland in what we hope are the waning moments of the pandemic, though we remain cautious and realistic about the immediate future. But, by the grace of God, we do find ourselves assembled together in person, and I can say that it is truly wonderful to see you now, not in a Zoom box dimly, but face to face (cf. 1 Cor 13:12). Over the past few months, most of us have slowly been re-introduced to similar in-person gatherings in our churches, at work, and in our communities. And I am sure that, like me, you have experienced the emotional, and even deeply spiritual, satisfaction of this return to genuine community and reconnection. I am confident that all of you share my sense of gratitude to our Lord Jesus Christ for allowing us this consolation and for granting us some relief from the restrictions that have kept us isolated and separated from one another for too long. At the same time, we warmly welcome those of us who are only able to join virtually, and we look forward to the next opportunity to embrace you in person.
- New Members.* We welcome our new Metropolitan Council representatives, Dn. Matthew Prentice from the Archdiocese of Washington and Clement Joshua Godbold from the Diocese of South, to their first in-person meeting and look forward to your contributions to this body. I also ask for everyone's prayers on behalf of Fr. Michael Anderson, who is not well and is unable to join us this week.

3. *Unique Gathering.* Our gathering this week is unique in that we are holding the Autumn Sessions of both the Metropolitan Council and the Holy Synod during these days and, in between these two important gatherings, have strategically placed a joint leadership meeting. In addition to the members of the Holy Synod and the representatives of the Metropolitan Council, this joint meeting will include the participation of the Diocesan Chancellors, the leadership of all three of our seminaries, and superiors from several of our monastic communities. The long-range purpose of this joint meeting is to prepare ourselves for the 20<sup>th</sup> All-American Council, which will take place in July of 2022 in Baltimore, Maryland. But a more immediate and fundamental purpose for this gathering is to provide ourselves with an opportunity simply to be together and to re-learn how to undertake our common work in the Church after these months of separation and isolation.

To be sure, the essential life of the Church did not stall, nor did this body cease to function, during the pandemic. We might even have found that the new methods of virtual collaboration that we had to adapt to have made us more efficient in our work, and perhaps connected us to our fellow human beings in ways we had not explored before. Nevertheless, there is no degree of efficiency or ease of virtual communication that can replace the spiritual and emotional importance of maintaining physical personal connections in our Church activities. We have all experienced a certain weakening of our social and communal muscles, which now, after many months of inactivity, must slowly be strengthened through exercise and practice. Such exercise includes the administrative work that requires our attention within the various institutions and authoritative bodies of the Church. This Metropolitan Council is, of course, one of the most important of these bodies, and I look forward to reaping the fruit of our first in-person exercise. I encourage all of you to take advantage of the opportunity we will have this week to re-engage with the various leaders of the Church, not simply as co-workers but as fellow Christians who have the common task of manifesting the kingdom of God on this earth. Such a task should not be seen as something burdensome and complicated to achieve. It begins with a simple movement of personal encounter even in small

ways, such as during one of our breaks, our common meals, and our receptions. In this way, we can introduce ourselves to those we don't know and begin to re-acquaint ourselves with those we do know, as we discern how to deepen those ties that will help us not only to fulfill our administrative work but, more fundamentally, fulfill our vocation as the Body of Christ.

4. *Vocations.* Vocation, of course, has been chosen as the theme for next year's All-American Council, a theme reflected in the title chosen by the Pre-conciliar Commission and endorsed by the Holy Synod: "Becoming Vessels of Grace." I will defer my broader and more substantial comments on this topic until Wednesday, when I offer my address to the joint leadership gathering. However, I will note here that I am confident that our joint meeting will be very productive and, in many ways, key to setting the stage not only for the next year but for the next decades of the Orthodox Church in America. It is my hope that our joint meeting on Wednesday will initiate a broader discussion and dialogue throughout the Orthodox Church in America on the theme of vocations. By discussion and dialogue, I do not simply mean talking and opining about issues, but taking action and responding to the many challenges that we face as a Church in North America. Our tackling of the challenge of nurturing vocations on all levels of Church life is not intended to be a simple slogan for our week-long gathering in Baltimore. Rather, it should be a reminder to each of us, individually and in every context that we find ourselves in—parish, deanery, diocese, committees, boards, and institutions—that we are all organically members of one another in all that we do in the Church.
5. *Our Agenda.* The Metropolitan Council is a key player in this ongoing dialogue, and the significant issues that we will address in these first two days of meetings are integral to the implementation of the vision we set for ourselves. These issues include receiving updates on the Chancery relocation process, reviewing the significant matter of the pension plan, and reviewing the 2022 budget. But we should bear in mind that all of the specific issues that we address must be clearly placed within the context of the fullness of our Church life. On Tuesday evening, I

will speak on this subject of the conciliar nature of our Church when I join Fr. Thomas Soroka for his live podcast. When we speak about conciliarity, it is not something that should remain purely theoretical, but something that is lived out in the very practical realm of our work. For those serving on the Metropolitan Council, this means taking full ownership of our responsibility to safeguard, execute, and implement the decisions of the All-American Council. This requires, first of all, a direct engagement with all the documents that we safeguard, including such things as the Pension Subcommittee report, which we have been discussing and will continue to discuss this week—and a thorough familiarity with all aspects of the functioning of the Church. Not all of us are technically or professionally qualified, but together, as a body, we have the skills and the expertise to guide us in this work. I look forward to our discussions this week.

6. *My Travel.* Since our Spring Meeting, I have slowly begun to increase my travel, making a few more pastoral visits to the Archdiocese of Washington and to the dioceses for which I serve as locum tenens. I spent the entire first week of Great Lent at St. Tikhon's Monastery, and in the following weeks of Lent traveled to Sts. Peter and Paul Church in Meriden (in the Diocese of New England) and to Sts. Peter and Paul in Philadelphia (in the Albanian Archdiocese). Also during the forty days, I presided at the funeral of Archpriest Basil Summer, our long-serving messenger of joy and former Director of the Fellowship of Orthodox Stewards. On the Feast of St. Tikhon of Moscow in April, to mark the anniversary of my monastic tonsuring, we received Fr. Mark and Abbot Nikodhim from the Moscow Patriarchal Cathedral in New York, representing His Grace Bishop Matthew of Sourozh. I spent all of Holy Week and Bright Week in the Archdiocese of Washington visiting and serving at most of my 11 parishes and missions. This was the second of my longer stays in Washington, which I have been calling my "residencies."
7. *Continued Travel.* Later, in May, I presided at the commencement exercises for both St. Tikhon's and St. Vladimir's Seminaries and participated in the meetings of their Boards of Trustees. In that month, we also held our first in-person meeting

of the Holy Synod at the Monastery of Holy Dormition in Rives Junction, when we gathered for our Spring Session. At the end of June, I travelled to Boston to serve at St. George Albanian Cathedral and to honor Protopresbyter Arthur Liolin on his 50<sup>th</sup> anniversary of ordination to the holy priesthood. From there, I flew to Dallas, where, together with a number of our bishops, I presided at the episcopal ordination of His Grace Bishop Gerasim of Fort Worth. On July 11, I concelebrated with His Eminence Metropolitan Hilarion of Volokolamsk at the St. Nicholas Russian Orthodox Cathedral in New York City, and was able to discuss areas of mutual concern, including areas of future collaboration and visits between our Churches. At the end of July, I maintained a third residency in Washington, ordaining one of my Diaconal Vocations Program candidates to the holy diaconate and holding various meetings with clergy and faithful. In August, I travelled to Alaska for the annual St. Herman pilgrimage, which was preceded by a special assembly which unanimously nominated His Grace Bishop Alexis of Bethesda to be presented to the Holy Synod for election to the episcopal see of Sitka and Alaska. Upon my return from Alaska, I presided at the funeral services for Protopresbyter Leonid Kishkovsky, our long-serving and faithful director of the Department of External Affairs. Later that week, I returned to Washington for my fourth residency there and presided at the funeral services for Archpriest Michael Koblosh.

8. *More Recent Activities.* At the beginning of the academic year, I served at St. Tikhon's Monastery and Seminary for the Feast of the Nativity of the Mother of God and at St. Vladimir's Seminary for the Feast of the Exaltation of the Cross. Between those two services, I presided at the burial services for Archpriest Sergei Glagolev, another beloved senior priest of our Church, one who was known and loved by many in our Church for his dedication to liturgical music, but also for his gentleness and pastoral wisdom. At the end of September, I presided at the Albanian Archdiocesan Assembly in Worcester, Massachusetts, and continued on to serve at Three Saints Church in Ansonia, Connecticut to mark the 125<sup>th</sup> anniversary of the parish. Most recently, as I mentioned in our virtual meeting a few weeks ago, I participated, along with six of our bishops, in the tenth annual Assembly of Canonical Orthodox Bishops in the United States, which took place in

Washington, DC. I did concelebrate with the other bishops of the Executive Committee and offered the homily as well.

9. *Assembly of Bishops.* With respect to the meetings of the Assembly, I should mention that I continue to participate regularly, along with His Eminence Archbishop Michael, who serves as the Treasurer for the Assembly, in the ongoing biweekly meetings of the Executive Committee. If you recall, until two years ago, the Primate of the Orthodox Church in America was not included as a member of the Executive Committee, but I have been so considered since the arrival of the new Chairman of the Assembly. I should also remind this body that it was primarily through the efforts of the former Chairman that the Orthodox Church in America was even included in the Assembly at all. Those who may have been disappointed that, in previous Assemblies, I was seated with all of the other bishops of the Orthodox Church in America at the end of the table, will be pleased to know that at this latest Assembly I was seated at the head of the table with all of the other members of the Executive Committee. In addition, His Eminence Archbishop Elpidophoros relinquished the chairmanship of the meeting at various points to the other members of the Executive Committee, including me. I mention this simply to highlight the gradual increase of our presence and contribution to the Assembly. The consistent emphasis on the part of our Holy Synod on the importance of maintaining our good relations with all the canonical Orthodox Churches, both here and abroad, has, I believe, born fruit not only in terms of enjoying those fraternal relations, but also in firmly maintaining our integrity as a local Church.
10. *Other Meetings.* While our pan-Orthodox collaboration is important, I nevertheless continue to maintain a focus on our own internal life as the Orthodox Church in America. During the past months since our last meeting, I have held 17 meetings with Fr. John Vitko, my Chancellor for the Archdiocese of Washington, 10 meetings with Fr. John Kreta, my Chancellor for the Diocese of New England, and 15 meetings with Igumen Nikodhim Preston, my Chancellor for the Albanian Archdiocese. I have also presided at council meetings for all three dioceses, have

already completed Assemblies for Washington and the Albanian Archdiocese, and am preparing for the New England Assembly next week. I regularly oversee various matters at our stavropegial institutions, and am called to address any number of clergy matters related to the reception of clergy into the Orthodox Church in America and the ordination process for seminarians.

11. *The Chancery.* In all of this activity, I rely on the steadfast support provided to me by the Chancery staff, both those who are working here in person and those who are working remotely. Under the direction the Chancellor, Fr. Alexander Rentel, I continue to see a tremendous increase in efficiency of my Office. I am grateful to him for his wise guidance and unwavering integrity in advising me, but also for accomplishing an incredible amount of work, none of which is easy or simple. Many tasks require an endless number of meetings or review of documents, and Fr. Alexander is able to plough through this work with attentiveness to detail and to the larger picture. Fr. Alessandro Margheritino has proven to be a valuable addition to our team and has been able to remove some of the burden from the Chancellor with respect to the many areas of his competency. This includes the complex planning process that was involved in this week-long series of meetings in Cleveland. So I offer my thanks to Fr. Alessandro for his valiant efforts in work that often involves many frustrations and challenges, all of which he forges through valiantly and without complaint. In this, he is helped with great enthusiasm and energy by Barry Migyanko, who keeps a strong hand on all matters dealing with the logistics and functioning of the Central Administration, and I am grateful to him for his persistence and for his perseverance. You will hear more about the work of our other remote staff in the reports of Fr. Alexander and Fr. Alessandro, but I should also offer my gratitude to Andrew Smith, our Treasurer, and Susan Wisnewski, our Accounting Manager, with respect to all things financial, and to Fr. Thomas Soroka, who faithfully attends to the work of our Departments. Just recently added is Fr. Kyle Parrot, who has assumed the important role of Acting Communications Director. The rest of our Communications team, including Fr. John Schroedel and Matushka Jessica Fuhrman, is to be commended, as is Alexis Liberovsky in the Archives.

12. *My Personal Staff.* For some time, I have not had the benefit of a personal secretary or a personal aide and subdeacon. Those responsibilities had been handled by the current staff as best as possible. But there have been some more recent developments: I am pleased to have the addition of Fr. Larry Soper, who has been serving as my driver and assistant for most of my pastoral visits, in addition to providing administrative support for the Diaconal Vocations Program and other aspects of the Chancery operation. Just recently, we have also engaged two part-time and remote staff members who will share in the various needs of my personal secretary: Dn. Peter Ilchuk, who is well known to us as Council Manager for the All-American Council, and who was instrumental in assisting Fr. Alessandro with this gathering in Cleveland, will be helping me with overseeing my correspondence and setting my calendar, and will also travel with me on occasion. Fr. John Mikitish will help me with the drafting of documents and with some aspects of external relations.
13. *A Perspective on Our Meeting.* There are two significant matters that this Metropolitan Council will need to consider: the Chancery relocation process and the pension plan issues that we have already begun to review. Here I would only like to make two points. First, I would like to offer my sincere gratitude to Greg Honshul and Ray Steeb for their tremendous and professional leadership, not only of the Property Committee, but also of the Landing Committee and its various subcommittees. This has been a labor-intensive process and one, as they will report, which is not yet completed. We are at a point where it is necessary to take a step back, not in retreat, but in further reflecting on the major undertaking that is the Chancery relocation project. I remain committed to my intention of relocating to the Washington, DC, area but I look forward to gaining further insights into this process and look forward to the input of the Metropolitan Council. I also offer my sincere thanks to Andrew Smith and all those who assisted him, first in the preparation of the initial pension plan review, and then with the further assessment provided by members of this body. I think we all recognize the gravity of the situation but, at the same time, we acknowledge the value and benefit of the pension plan of the Orthodox Church in America. It is important that this

body thoroughly review this matter and that it discuss this as long as is necessary to reach the appropriate conclusions. It is not likely that we will arrive at such conclusions at this meeting, but it is nevertheless important and necessary that this body undertake its due diligence in this matter.

14. *Personal Concluding Update.* I would like to conclude with a bit of a personal update which may, at the same time, have some bearing on our discussions over the next few days. On May 23 of this year, I weighed myself on my bathroom scale and noted with alarm what I have been noting with alarm for the past few years: that my weight was steadily increasing. On this particular day, the alarm reached the point where I knew that (as perhaps we have all said to ourselves): “This time I need to do something about this.” So I located a nutritionist online and sent her an email requesting an initial appointment. I was expecting (or perhaps hoping) that she would not get back to me until a few days, so that I could indulge in a few final unhealthy meals. But this was not meant to be, since the nutritionist gave me a phone call just a few hours after I sent my email and suggested that she was available for my first appointment the very next day. So, on May 24, I attended my initial in-person meeting with her and, from that point, have been maintaining a schedule of weekly phone check-ins, at which I report my weight and also provide a log of all the food I have eaten during the previous week. Since that initial consultation, I have carefully monitored what I have been eating and have maintained a routine of walking 3–5 miles a day. As of yesterday, I have lost 28 pounds. I mention this in part because I am very pleased with my progress in this area, but also in part because this process has been a reminder to me of the importance of a steady and consistent approach to the challenges of life. This applies to our Church challenges as well. It took me 17 years of episcopal life and stress to gain the unnecessary weight I gained, so I did not expect that I would regain my physical health overnight. I am pleased with the progress so far, but there remains work to be done. It is the same for our work in the Church. In our case, as we look at the health of the pension plan, we should look not to immediate and reactive solutions but to the long term solutions that will ensure the overall health of our clergy. When we evaluate the factors involved in the Chancery

relocation, the safeguarding of the Archives, and the location of the Chancery offices, we should keep in mind the need to exercise good stewardship of these gifts—not to simply find a financial solution. I believe that the members of this body are prepared and well qualified to take this approach to the issues at hand. I welcome your honest and direct contributions, and invite you to take the lead in guiding the broader Church to a similar approach to our life as the Orthodox Church in America.

15. *Upcoming.* In terms of upcoming events, I can report that my planned trip to Moscow for the celebration of Patriarch Kirill's 75<sup>th</sup> birthday has now been postponed by the Moscow Patriarchate because of concerns related to COVID. Nevertheless, we maintain our strong connections with the Russian Church, and we will welcome His Eminence Metropolitan Hilarion of Volokolamsk to the United States in November, where he will offer a keynote address at St. Vladimir's Seminary and will concelebrate with me at a location to be determined. I will take two weeks of vacation to visit my paternal home in France from November 18 to December 3. As we look to the next year, I would like to propose the following dates for the 2022 Metropolitan Council meetings: a) February 9–11 and b) October 12–14. I would also add a question for us to discuss today, on the desirability of holding one of these meetings remotely.

Thank you, and I ask for your prayers.

**Report of the Secretary of the Orthodox Church in America**  
**2021 Fall Session of the Metropolitan Council**  
**October 18-19, 2021**

**OVERVIEW.** Your Beatitude, Reverend Fathers, Esteemed Members of the Metropolitan Council, it is a blessing and an honor to present this report as Secretary of the Orthodox Church in America. My work at the Chancery started over a year ago but it is only in June that I was able to relocate with my family and assume my duties full time.

From the start, I would note that, with the blessing of His Beatitude Metropolitan Tikhon and the leadership of Archpriest Alexander Rentel, I have been able to fall into the everyday work and various dynamics of the Chancery easily. This is also thanks to the dedicated staff that works tirelessly in support of the Office of the Metropolitan, the Holy Synod, as well as the Church at large.

To the best of our abilities, the office strives to operate steadily and efficiently, and always in a professional manner. That is not always an easy task and is challenging for a variety of reasons, among which are the workload and the variety of tasks to which this office is called to respond on a daily basis. This is a small office with very limited staffing in its present configuration, with several of its employees working part time.

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

**WESTWOOD MANAGEMENT.** As the Property Committee indicates in their report, Westwood is still on the market although we have not received any offer to date. Westwood remains the location which houses the Chancery office as well as His Beatitude's residence.

Over the last couple of years, we have delayed some maintenance in connection to the sale of the property. Nevertheless, there are minor items that require our ongoing attention. Most recently, we have been experiencing issues with the front door because of the high humidity, and this is an issue in the process of being addressed by a local contractor. The light over the garage and the driveway were out for several months but this was recently fixed with a minimum expense. The gutters were cleaned after a long time, and one section is about to be repaired so that water will no longer be accidentally directed toward the basement windows.

At the end of August and beginning of September, Long Island experienced two major storms. In both occasions, some water made its way to the basement though at much less concerning amount than in the past. I recently spoke to the landscaper we contract and there might be additional minor and fairly inexpensive improvements we can make around the basement windows that would almost completely prevent water from entering the basement.

Having said this, the basement—which is where the Archives of the Orthodox Church in America have been stored for about 60 years now—remains a highly unfit location for the archival treasurer of our Church, not only because of the limited space available to catalogue, process, and organize the material, but especially because of the humidity and unstable temperature due to heating pipes that run along the ceiling.

**INFORMATION TECHNOLOGY.** Back in the spring, I reported on a number of technology changes and improvements that the Chancery office has embraced since the end of 2020. Some of these changes have included moving to a virtual server (BOX.com), adopting a highly efficient internal communication system (Slack), moving to a virtual phone system (MightyCall), a cheaper and more effective Payroll system (Accudata); a better and cheaper internet service (Fios).

These changes have been implemented for a variety of reasons: they represent a more efficient and effective way for office operation; to a great extent, they allow seamless remote work for when we travel but also for some of our staff who works across North America; they are also much more cost-effective.

Some of these changes allow our office to respond more promptly to the various requests and questions we receive every day. Looking ahead, Father John Schroedel, Barry Migyanko, and I are beginning to explore new platforms for our digital clergy database.

These more efficient tools have allowed the office to save considerable amount of money: moving to a virtual phone system meant savings of \$1,500 per year from the discontinued Avaya equipment, plus a monthly bill that ranged from \$50 to \$300; moving from Optimum to Verizon Fios ensured a better internet connection and took us from \$500 a month to only \$225; moving from a physical server to Box saves us over \$5,000 a year; moving to Accudata as our new payroll system has cut payroll costs to about half. Moreover—with the help of Susan Wisnewski, Accounting Manager, who is much to be commended for these improvements and for her dedicated work—we have unsubscribed from services and licenses of softwares that we have not used.

**INSURANCE.** We have recently consolidated our insurance needs and engaged Insurance System as our sole broker. Specifically, Insurance Systems is now also our broker for Health Insurance, Life Insurance, Disability, Dental and Vision. On a number of occasions, we found our previous broker, My Benefit Advisor, to be quite unresponsive to questions and requests from our office. Our experience with Insurance System has instead been consistently very positive.

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

The current members of SMPAC are: Archpriest Alexander Rentel, Chancellor, Priest Alessandro Margheritino, Secretary, Archpriest Alexander Garklavs, Protodeacon Peter Danilchick, Ms. Cindy Heise, Mr. Robert Koory, Esq., and Mr. Bernard Wilson.

The Committee met via teleconference on October 7, 2021 and discussed the recent data on PSP compliance and ORSMA cases provided in the 2021 Diocesan Reports.

As Secretary of the Orthodox Church in America, one of my responsibilities is to oversee PSP compliance for the Stavropegial Institutions but also to be the general administrator of the OCA account with Protect My Ministry, the company we use for criminal background checks youth safety training.

**ARCHIVES.** At its 2020 Fall Meeting, the Metropolitan Council adopted a resolution that tasked the Archives Advisory Committee to issue a Request For Proposals (RFP) for the Archives of the Orthodox Church in America. The RFP<sup>1</sup> was published on the OCA website on May 20, 2021 and was shared through different platforms such as the Society of American Archivists, the Association of Research Libraries, the Association for Slavic, East European, and Eurasian Studies, and the American Theological Library Association.

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

The initial deadline to submit a proposal was July 20. We have received four proposals in response to the RFP, and these are the four proposals we knew we were going to receive based on prior conversations with these institutions. Unfortunately, no other proposal has been submitted and this is likely due to the conditions indicated in the RFP.

The proposals received are from St. Vladimir Orthodox Theological Seminary, St. Tikhon Orthodox Theological Seminary, Miami University (Oxford, OH), and Alex Liberovsky, OCA Archivist. The Archives Advisory Committee has received and reviewed these proposals, and discussed them via teleconference on September 28, 2021. While indicating that none of these proposals is fully satisfactory at this point, the Committee suggested to write formal responses requesting additional information. This should be accomplished in the next month or two. Meanwhile, after their proposals were submitted, I have kept ongoing conversations with the institutions to address some of their questions as well asking them clarification on their proposals. At its recent meeting, the Archives Advisory Committee discussed the urgency of the relocation of the Archives in connection to the

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<sup>1</sup> <https://www.oca.org/files/PDF/NEWS/2021/2021-0520-request-proposals-oca-archives.pdf>

possible sale of Westwood, the unfavorable conditions due to heat and humidity, as well as the limited space that does not allow the Archivist to receive and process new donations.

In terms of timeline and process, with the blessing of His Beatitude Metropolitan Tikhon, and once we receive further information regarding the four proposals, I will call another meeting of the Archives Advisory Committee asking the members, in their advisory function, to further evaluate the proposals and advise His Beatitude on which proposals he should submit to the Metropolitan Council for consideration at the 2021 Spring Session.

I want to highlight below in bullet points *some* key elements that are layout in each of the proposals and that I have gathered from further conversations with the institutions.

#### St. Vladimir Orthodox Theological Seminary

- The Seminary offers to house the Archives in the Florovsky Library and ensure high standards of preservation in their climate-controlled facility.
- The Seminary is only interested in housing the actual archives of the collection and not in the complimentary collection (photographs, films, videos, church directories, anniversary publications).
- The Seminary plans to hire an archivist in the future and, possibly, provide additional staffing through the seminarian's community service program. Thus the Seminary will ensure that staff provides requested material to the Church Administration in a timely manner. The Seminary Library will resume the digitization project of the Archives and look for future grant-funded opportunities.
- The Seminary is likely to ask the OCA to only fund the move of the archival material from Westwood to the Seminary Library and to purchase some shelving units.

#### St. Tikhon Orthodox Theological Seminary

- The Seminary does not presently have a location/building where the Archives can be housed. The Seminary is currently exploring the possibility of building a new library that could have a dedicated wing for the OCA Archives. In the proposal, the Seminary asked for an extension to the end of October in order to obtain from an architect some possible drawings and rough estimate of such a project. The Monastery will likely offer the land for this building.
- The Seminary would guarantee that ownership of the Archives remains with the OCA.
- The proposal contains the following contingencies: the formation of a stand-alone Archives Foundation; the contribution of \$1,000,00 or one-sixth of the net proceeds of the sale of Westwood from the Central Administration to fund the Foundation with guarded principal and while using the interest annually for the Archives budget (staff, technology, electricity, etc.); the OCA, in perpetuity, would fund the Archivist and any other expense not covered by the interest of the above-mention fund; Digitization and Grant writing projects will be the responsibility of the OCA Archivist. The Monastery and Seminary will not offer staffing for the Archives.
- The Seminary ensures open access including access with short notice to the Chancery Office
- As of now, there is a possible donor who might be willing to donate \$500,000 as seed money for this project.

## Miami University

- Dr Scott Kenworthy, a faculty member of the university and a faithful member of the Orthodox Church in America, has submitted the proposal for Miami University.
- With its already established focus on Slavic studies, the University could become a center for the study of Orthodox Christianity in North America were they to host the OCA archives.
- The goals of the Walter Havighurst Special Collection and University Archives in acquiring the OCA Archives would primarily be three: to preserve the Archive, to make them accessible, and to digitize the collection for wider accessibility. Miami would also work to develop the archive and grow the collection.
- The University Archives has exhibit space where exhibits of Orthodoxy in America can be displayed.
- The University is a professional and established institution focused on student research.
- Miami University proposes to receive the OCA Archives as a gift given the collection is very large and will be very costly to store, process, catalogue, provide staffing, digitize, and that the OCA Archives come with no financial support from the OCA. (On this point, Dr Kenworthy is speaking with the University leadership to inquire about a possible long-term loan arrangement as an alternative to a permanent gift)
- The University will apply for external fellowships and grants and work on digitization. The University will share with the OCA all digital copies of its scans so that, in effect, the Church will retain its archive in digital form.
- The University expects no funding from the OCA for the relocation, management, and processing of the Archives.
- (In conversation with Dr Kenworthy, I plan to make a trip to Miami University in order to see the location in person and meet other Archives staff)

## Alex Liberovsky

- In his proposal, the OCA Archivist emphasizes that the Archives have been housed in the same location as or in close proximity to the central administrative offices of the Church for many decades. The purpose of the OCA Archives has always been to serve the Orthodox Church in America as its institutional memory. First and foremost, these records are preserved for the reference needs of the Central Church Administration. For these reasons, it seems prudent that the Archives should be preserved at the same location as the OCA Chancery.
- If the OCA Archives and all complementary collections remain with the OCA Chancery, there will be no issues of ownership to resolve as there would inevitably be with a third-party providing housing for the Archives. Likewise, the OCA would continue to maintain full authority over the collections in deaccessioning, transfer or disposal.
- If the OCA Archives is moved with the chancery to the Washington, DC area, staffing will remain under OCA control for the care of its own precious records. With the presence in DC of the National Archives, the Library of Congress, the Smithsonian Institution and other repositories, it will likely be easier than elsewhere to find potential staff members, as well as further connections to grant-funding and other agencies useful for the OCA Archives.

- Regarding funding, it should be noted that the foundation who wishes to remain anonymous that provided a grant for digitization to the OCA Archives a few years ago continues to have a strong interest in the OCA Archives and has expressed its willingness to support our projects including relocation and facility construction (with significant matching grant funding) as well as other endeavors in the years to come.
- In the eventuality that the Westwood property is not sold, and it is decided that the OCA Chancery should remain at its current location, there should be renewed consideration of construction of a new building to house the OCA Archives on the Westwood property or renovation of the building's basement.

**COMMUNICATION.** As Fr. Alexander indicates in his report, we have finally engaged a new Communication Director for the Orthodox Church in America. Priest Kyle Parrott has joined our team in September working remotely from Victoria, BC. Father Kyle has already been a great help with a number of press releases, articles, and statements.

Fr. Kyle and I also manage the info@oca email address where we receive several requests and questions every day. We are developing a system to expedite our responses in the most appropriate way.

As Fr. Kyle settles more into this position and assumes the direction of the website, he will continue to work with both Matushka Jessica Furhman, Web Content Manager, and myself.

The website is in need of reorganization which is something we can accomplish in the near future. However, the website is also due for a redesign which is something we have to begin exploring and that will require us to hire a web design firm.

My office recently announced the publication of the 2022 Desk Calendar, which is already at the printer. Over the past few months, our office received a number of requests from both clergy and laity encouraging us to continue its publication. As in the past, the calendar will include ample space for daily notations and memos and a mini-directory of OCA ministries, departments, boards, commissions, diocesan chanceries, and seminaries. Key liturgical commemorations and significant historical dates for the year will also be noted. The Desk Calendar will highlight the dates of the 20th All-American Council but will not include diocesan and national events such as diocesan assemblies, seminary commencement dates, Holy Synod and Metropolitan Council meetings. These dates are indicated on the Web Calendar of our website's homepage.

**OPERATIONS.** One of the main duties of the Secretary is the planning and management of various meetings. There are numerous meetings to schedule every month with committees, boards, various bodies within the Church, and individuals. These meetings have continued mostly via teleconference so far, via our Zoom account. Most meeting require a variable amount of preparation from this office.

As we all know, the 20<sup>th</sup> All-American Council is the biggest event in the coming year, and one that requires an enormous amount of work, not only from our office but from many others in the Church. Deacon Peter speaks of this in his report, and I want to take the opportunity to thank him for his diligent, precise, and dedicate work. One area in which I have been personally working together with Barry Migyanko—to whom I am greatly thankful for this as well as for everything else he does in this office—is the registration for the AAC.

Without a doubt, much of my work in the last couple of months has been oriented toward this very meeting in Cleveland. As you know, in the week of October 18-22, there are three major meetings: 2021 Fall Session of the Metropolitan Council, Expanded Joint Meeting of the Holy Synod and Metropolitan Council, and the 2021 Fall Session of the Holy Synod.

The details about the Joint Meeting have been addressed in other documents and presentations prior to the meeting itself. I want to thank Dn Peter for being our liaison to the Sheraton Hotel, Fr. Remus Grama and the community of St. Mary Romanian Cathedral who with the blessing of His Eminence Archbishop Nathaniel are hosting us for the Divine Liturgy, and all of the participants to the meeting who are taking time off their busy schedule for this important gathering of our Church.

**OTHER.** There are a number of other important tasks under the purview of the Office of the Secretary and in which I am involved on an ongoing basis. I continue to maintain the 501C3 master list and work with a number of parishes on their tax-exempt status. I also continue to draft and maintain the Chancery Monthly Digest that is distributed every month to the Metropolitan Council, Diocesan Chancellors, and heads of Stavropegial Institutions. Over the last several months, with the position of Secretary to the Metropolitan being vacant, I have assisted His Beatitude with his schedule and some areas of communication. I continue to manage the web calendar accessible through the home page of our website and, I continue to ask the Dioceses to send our office information of the upcoming events so that may be indicated there.

In Christ,

Priest Alessandro Margheritino  
Secretary of the Orthodox Church in America

# Technology Committee

## Report to the Fall 2021 Session of the Metropolitan Council of the Orthodox Church in America

October 16, 2021

The Technology Committee of the Metropolitan Council is appreciative of the report of the Secretary prepared for this Meeting for its detailed list of administrative information technology upgrades and changes.

On October 12, 2021, the members of the Technology Committee met with Archpriest John Schroedel, who as a consultant provides a wide range of technology services to the Central Church Administration.

The members of this Committee had worked closely with Archpriest Alexander Rentel and Fr. John Schroedel during the transition from the tenure of Ryan Platte to Fr. John and the questions we asked Fr. John were informed by that intense moment when we were called to personally “roll up our sleeves” in the technology infrastructure of the Chancery. This report does not cover the full scope of our conversation; indeed, it was a pleasure and hopefully of help to Fr. John to “nerd out” on some of the details.

Fr. John Schroedel reported on the “big picture” of moving Church technology services to the “cloud” and thus empowering appropriate decentralization and the end of maintaining physical servers at the Chancery. Fr. John spoke also in some detail about the All American Council and technology needs there.

We discussed the benefits and downsides to using “out of the box” solutions versus “home grown” solutions to a variety of technology needs, including those related to the AAC (e.g., badge scanning) and clergy directories.

We spoke extensively about the web site and what might be needed in the future with the hiring of Fr. Kyle Parrott.

One item that the meeting highlighted was the need to better understand what technology infrastructure, hardware, and software is actually in use at the Chancery property itself. Questions around scanning, printing, wireless access points, firewall solutions, and other office needs were discussed in the context of needing to document these in the future, especially to support any future location move.

## Recommendations for consideration and action before the Spring 2022 Session

- Work with the Staff on a way to support the Chancery offices by better understanding what is in place at the Chancery. Perhaps most urgently, better understand antivirus/firewall/encryption strategies especially as Staff function “on the road” and remote
- Ask that Fr. John Schroedel’s documentation be shared (read-only to the Committee)
- Commend Fr. John Schroedel’s use of password management software and his sharing of Church-related passwords with the Chancellor as a matter of policy and course
- Interactive internal audit by the Tech Committee of tech systems, documentation, password security, Cybersecurity, etc., e.g., annually
- Budget for intrusion testing and external audit (2023?)
- Seek clarity on what, if any, Cybersecurity Insurance the Chancery carries and support the Chancery in understanding options/budget
- Seek clarity on the overall budget for all technology investment
  - o While Fr. John reported that the budget is adequate and appropriate, the Committee has the sense that some additional spending on risk mitigation may be appropriate in the current Cybersecurity-risk environment and that some spending to help move the web site and directory projects forward may be helpful

At the conclusion of our meeting, we expressed our gratitude to Fr. John Schroedel for his work and agreed to meet with him far in advance of the next Metropolitan Council to keep working on these matters and to be more regularly in communication, mostly with a view to be additional “sounding boards” and thought partners on the many complex matters that face the Church around technology in a fast-moving environment.

Respectfully Submitted,

Archpriest Kirill Sokolov, Chairman  
Priest Peter Runyon (advising member)

# Orthodox Church in America

## Metropolitan Council

18 October 2021

### Property Committee Report

#### **Most Blessed Master, Bless!**

The Westwood Property remains available for sale since listed with Compass Realty last September 2020. During these past twelve months we received a single written offer, which was considered and declined.

The Westwood marketing effort, rendered by Compass Realty, and our agent, Fran Mazer, has been unquestionable extensive, vigorous, and applied multiple methods of media promotion, such as social, print, and electronic advertising. In addition to these exhaustive efforts, Fran directly marketed to interested parties via showings of the Westwood property and networking with fellow Compass agents and brokers.

To achieve our list price of \$6.5MM, we targeted residential buyers who would desire Westwood as a vintage property, with excellent location, suitable for investment and renovation, or as their personal residence. Such a buyer might also consider a property lot sub-division to raise finances for payment of the renovation. Although, there were interested parties, we received no serious offers for consideration.

By far, Westwood attracted the attention of local land developers and home builders, who found the Oyster Bay Cove location with fifteen acres of listed property to be an attractive opportunity. Again, we experienced one interested party whose (early) offer we dismissed as unacceptable.

What have we learned from Compass feedback?

- The Long Island High-End Market is soft, above ~ \$3.5MM
- Compass believes the eventual buyer will be a developer or investor
- Compass is recommending a listing price reduction, to spark interest before year end
- Westwood will require extensive renovation, if restored for residential use, estimated at \$1.0MM to \$2.5MM
- Tax Burden to potential buyer – Westwood assessed at \$12.8MM, requires appeal
- Development opportunities limited by local Village zoning restrictions
- Question: the total number of buildable lots the zoning board would approve on our 14.7 acres parcel

## Property Committee Next Steps

1. Engage a Tax firm to appeal our over-assessment (burden to buyer)
2. Engage a Zoning attorney to advise us on local zoning restrictions & possibilities for non-profit zoning opportunities
3. Consider Westwood as an asset of the Central Church and discover possibilities to monetize to achieve a long-term income stream
4. Contribute to the creation of a plan for disposition of Westwood

## Questions to the Metropolitan Council, which require attention and response:

1. We have a Resolution specifying the sale of Westwood and relocation, but by when?
2. Should the sale-by-date for Westwood be slated for 2022 or beyond, what will be Westwood's expected holding cost (ongoing renovations, repairs, and upkeep)?
3. What is the draft budget plan for the proceeds of the sale of Westwood, i.e., relocation budgets for archive, chancery, and Metropolitan Tikhon? (at \$5mm, \$5.5mm, \$6.0mm)
4. Will we accept fair market value for sale of Westwood?
5. Will we be willing to consider other avenues of opportunity to enhance our sales return on Westwood, should we not receive a suitable offer?
6. What is the unacceptable time beyond which, if Westwood not sold, do we would consider revision of our sales plan (i.e., 1, 2, 3, 4 or > 5 years?)
7. Regarding a new build space for the Chancery, what are the specifications for size and materials, and design. What is the lot size requirement?
8. Is it time to regroup and plan the move to Washington DC?
  - a. Determine timing and budget to move the Chancery
  - b. Determine timing and budget to finalize move of His Beatitude
  - c. Determine timing and budget to care for the archives and decide final disposition
  - d. Determine what is the best and highest financial benefit to the OCA, from the Westwood property asset.

Our goal on the Property Committee is to find a buyer for Westwood, at the best (or at least fair) market return. With flexibility, we believe this to be possible in 18 to 24 months, or longer if we are unwilling to respond to market trends. The Property Committee believe it prudent to consider alternative strategies that will maximize our sale price within the accepted time schedule. During the next six months, as we prepare to transition to the next phase of selling Westwood, we will encourage efforts continue to discover answers to the questions posed above. Doing so, will prepare us for the unexpected and enhance our efforts to move our mission forward without delay.

Yours in Christ,

Ray Steeb & Gregory Honshul

Co-Chairpersons

## **Orthodox Church in America**

### **Treasurer's Report**

Metropolitan Council – Fall 2021

Your Beatitude, Reverend Fathers, Brothers and Sisters:

Greetings in Christ!

The first three quarters of 2021 have proven to be quietly busy. Susan Wisnewski continues to ably handle the day-to-day finance operations of the OCA, which has allowed me to spend time focusing on other significant projects and initiatives. I, for example, continue to consider the potential timelines and financial implications of a move from the Westwood property and I've undertaken a project to help the broader church understand more fully the OCA pension plan. We have also made significant strides in planning and preparing for the All-American Council next summer.

Below, I also discuss recent financial performance of the OCA and include discussion of the proposed 2022 budget.

I ask for your continued prayers as I seek to attend to the financial health of the OCA.

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

During the spring and summer of 2021, OCA staff worked closely with Satty, Levine and Ciacco, CPAs, P.C. to conduct the field work for the external audit of the OCA's 2020 financial statements. Susan responded to requests for explanation and documentation for key processes (e.g., Accounts Payable, Payroll, etc.), while I worked to provide updated presentation of endowment, investment, and annuity information.

Audit fieldwork has been completed, but we are awaiting one item for footnote disclosure. Once we have that, we will be able to issue final audited statements for Metropolitan Council review and formal receipt.

**Attachment A** is a draft of the audited financials, which has not yet gone through partner review and is not yet signed-off on.

#### **FY2021 Financial Performance through September 30, 2021**

**Attachment B** is the quarterly Treasurer's Report through September 30, 2021. The Covid-19 pandemic continues to alter the operations of the OCA's central administration. This has had a direct impact on financial performance, particularly as it pertains to meeting and travel expenses (we've significantly underspent in these line items). The Fall meeting of the Metropolitan Council and Holy Synod in Cleveland will make up for this in the fourth quarter of 2021.

Overall revenue is ahead of where we would expect through the first three quarters, though this is likely at least partially related to the timing of diocesan contributions. Expenses are down significantly from where we would expect through this point in the year, primarily due to the aforementioned travel and meeting expenses, as well as periodic vacancies of key positions through the current year.

The net effect is a healthy operating surplus through the first 9 months of 2021, which I expect to decrease over the course of the final quarter of the year.

### **2021 Internal Audit**

The Internal Audit committee has engaged in preliminary conversations about the 2021 internal audit. We planned to conduct the audit in September; however, medical concerns and occupational “busy season” conflicts have delayed the process. We anticipate a virtual audit in the coming weeks.

### **FY2022 Budget**

**Attachment C** is the proposed budget for FY2022. Overall, the budget is consistent with prior years, with the following notable changes:

- Modest revenue increase based on current year receipts of diocesan contributions
- 6.2% cost-of-living increase for all salaried employees (there hasn't been a cost-of-living increase in several years)
- Adjustments to health insurance based on latest quotes from the vendor
- Reallocation of the duties of several key positions and a general shift from W-2 employment to contract employment in order to cover these duties.

Respectfully Submitted,

Andrew Smith  
Treasurer

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

Draft 10-14-21

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Draft 10-14-21

## INDEPENDENT AUDITORS' REPORT

To the Board of Directors of  
The Orthodox Church in America

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

### Management's Responsibility for the Financial Statements

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

### Auditors' Responsibility

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

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

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

### Opinion

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

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

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

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

See independent auditors' report and notes to financial statements.

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

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

See independent auditors' report and notes to financial statements.

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

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

See independent auditors' report and notes to financial statements.

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

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

See independent auditors' report and notes to financial statements.

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

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

See independent auditors' report and notes to financial statements.

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

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

See independent auditors' report and notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**  
**NOTES TO FINANCIAL STATEMENTS**  
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**NOTE 1. ORGANIZATION AND BASIS OF ACCOUNTING AND PRESENTATION**

**A. ORGANIZATION**

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

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

**B. BASIS OF ACCOUNTING**

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

**C. BASIS OF PRESENTATION**

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

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

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

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

**D. MEASURE OF OPERATIONS**

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

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

**A. CASH AND CASH EQUIVALENTS**

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

**B. INVESTMENTS**

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

**C. FAIR VALUE MEASUREMENTS**

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

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

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

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

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

**D. ACCOUNTS RECEIVABLE**

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

**E. PROPERTY AND EQUIPMENT**

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

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

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

**F. ENDOWMENT INVESTMENT AND SPENDING POLICIES**

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

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

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

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

**G. CONTRIBUTIONS AND DIOCESAN ASSESSMENTS**

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

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

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

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

H. CONTRIBUTED SERVICES

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

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

I. FUNCTIONAL EXPENSE ALLOCATION

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

The expenses that are allocated include the following:

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

J. USE OF ESTIMATES

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

K. IMPAIRMENT LOSSES

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

L. INCOME TAXES

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

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

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

**M. RECLASSIFICATION**

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

**N. ANNUITY AGREEMENTS**

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

**O. UNITRUST AGREEMENTS**

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

**NOTE 3. AVAILABILITY AND LIQUIDITY**

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

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

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

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**NOTE 4. RESTRICTED CASH**

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

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

**NOTE 5. INVESTMENTS**

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

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

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

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

**NOTE 6. PROPERTY AND EQUIPMENT**

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

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

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**NOTE 7. EMPLOYEE BENEFIT PLANS**

PENSION PLANS:

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

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

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

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

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

<u>The Orthodox Church in America Pension Plan (Plan EIN: 06-1455789)</u>	<u>Actuarial present value of accumulated plan benefits</u>	<u>Fair value of plan assets</u>	<u>Total net contributions</u>	<u>Funded Status</u>
2020				#DIV/0!
2019	\$ 55,648,391	\$ 24,957,647	\$ 2,642,534	44.85%

OTHER RETIREMENT BENEFITS:

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

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**NOTE 8. PAYCHECK PROTECTION PROGRAM LOAN**

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

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

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

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

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

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

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

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

**NOTE 10. ENDOWMENTS**

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

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

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

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**NOTE 10. ENDOWMENTS (continued)**

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

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

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

**NOTE 11. LEASE COMMITMENTS**

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

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**NOTE 12. RELATED PARTY TRANSACTIONS**

Note receivable consists of a \$150,000 promissory note from the Orthodox Church Capital Improvement Fund. The Promissory Note is dated May 21, 2018, with interest at 2.75%. The note calls for monthly interest only payments of \$343.75 for 59 months commencing December 20, 2018 with a balloon payment of the principal balance of \$150,000 due December 20, 2023.

**NOTE 13. CONTINGENCIES**

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

**NOTE 14. CONCENTRATION OF CREDIT RISK**

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

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

**NOTE 15. COVID-19 PANDEMIC**

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

**NOTE 16. SUBSEQUENT EVENTS**

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



# ORTHODOX CHURCH in AMERICA

## **Treasurer's Report**

Quarter End - September 30, 2021

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

Greetings in Christ!

As we move into the fourth quarter of 2021, I look forward to the upcoming meetings of the Metropolitan Council and Holy Synod. These meetings will provide us a unique opportunity to consider -- with one another, in person -- a number of topics with significant financial impacts on the church. OCA staff continues to consider the financial implications of the proposed sale of the Westwood property and move to Washington, D.C., as well as the financial aspects of next year's All-American Council. OCA financial performance during this period has remained modest, but strong and we're well suited to face the opportunities and challenges ahead.

Attached is the Treasurer's Report for the period ended September 30, 2021. The report includes the following:

- \* Statement of Operating Activity - Unrestricted
- \* Statement of Operating Activity - Restricted
- \* Comparative Balance Sheet for September 30, 2021 and December 31, 2020

September 30, 2021 represents 9/12ths of the OCA's fiscal year, so the target for operating revenues and expenses is 75%.

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

### **Revenues**

Revenue collection was \$1,062K, including 75% of our anticipated annual endowment draw for 2021, on an annual budget of \$1,898K (81.26%). Diocesan contributions were at 79.26%

### **Expenses**

Expenses incurred through September were \$1,115K on an annual budget of \$1,898K (58.76%). Much of our positive expense variance is due to curtailed travel, lodging, and meal expenses related to Metropolitan Council and Holy Synod meetings. We expect significantly higher travel and meeting expenses in the last quarter of 2021 compared to the first three quarters.

### **Net Income**

Unrestricted net income is a \$427K (including 75% of the anticipated endowment draw) surplus through September.

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

In Christ,

Andrew D. Smith  
Treasurer

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2020 - **Preliminary & Unaudited**  
September 30, 2021

				Target 75.00%	
				D	
<i>Unrestricted</i>	A	B	C	% BUDGET USED	
	<b>CURRENT QUARTER</b>	<b>YEAR TO DATE</b>	<b>ANNUAL BUDGET</b>		
1	<b>REVENUE</b>				
2	Diocesan Contributions	407,227	1,334,353	1,683,455	79.26%
3	Individual/Business Contributions	13,995	88,274	100,000	88.27%
4	Service Fees	12,700	13,600	15,000	90.67%
5	Interest Income/Realized Gains/Losses	1,045	3,125	-	
6	Appeals	-	-	-	
7	Special Events	-	-	-	
8	Other	810	2,523	-	
9	Release from Restriction - Endowed	-	49,500	66,000	75.00%
10	Release from Restriction - Restricted	-	51,000	33,615	
11	<b>TOTAL REVENUE</b>	<b>435,778</b>	<b>1,542,375</b>	<b>1,898,070</b>	<b>81.26%</b>
12					
13					
14					
15	<b>EXPENSES</b>				
16	Administration	81,930	272,383	376,035	72.44%
17	Executive	130,908	390,296	642,469	60.75%
18	Archives	22,761	71,890	96,044	74.85%
19	External Affairs	14,855	36,339	63,939	56.83%
20	Chapel	113	1,155	4,400	26.24%
21	Property	12,224	89,632	125,430	71.46%
22	TOC/Comm	5,280	20,060	49,186	40.78%
23	Holy Synod	5,339	24,160	66,300	36.44%
24	Metropolitan's Office	4,870	12,852	63,400	20.27%
25	Metropolitan Council	2,583	2,668	32,450	8.22%
26	St. Catherine's	15,377	43,410	65,300	66.48%
27	SOCA	-	-	-	
28	BOT	-	-	10,000	0.00%
29	Mission Planting Grants	17,000	51,000	68,000	75.00%
30	Ordination Candidacy	-	-	12,000	0.00%
31	Canons & Statutes	-	-	-	
32	ORSMA	1,193	13,067	27,611	47.32%
33	Continuing Ed	-	-	9,000	0.00%
34	Seminaries	-	-	18,000	0.00%
35	Departments	16,798	86,328	168,506	51.23%
36	<b>TOTAL EXPENSES</b>	<b>331,232</b>	<b>1,115,239</b>	<b>1,898,070</b>	<b>58.76%</b>
37					
38	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>104,546</b>	<b>427,136</b>	<b>1</b>	

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2020 - **Preliminary & Unaudited**  
September 30, 2021

	A	B	C	D
<i>Temp Restricted</i>	<b>CURRENT QUARTER</b>	<b>YEAR TO DATE</b>	<b>ANNUAL BUDGET</b>	<b>% BUDGET USED</b>
1 <b>REVENUE</b>				<b>Target 75.00%</b>
2 Diocesan Contributions	61,417	61,417	-	
3 Individual/Business Contributions	121,525	204,268	-	
4 Service Fees	-	-	-	
5 Interest Income/Realized Gains/Losses	65,551	59,438	-	
6 Appeals	-	-	-	
7 Special Events	-	-	-	
8 Other (incl Grants)	-	-	-	
9 <b>TOTAL REVENUE</b>	<b>248,493</b>	<b>325,122</b>	-	
10				
11				
12				
13 <b>EXPENSES</b>				
14 Restricted Funds				
15 All-America Council	6,107	11,001	-	
16 Charity	-	-	-	
17 Missions	-	-	-	
18 Seminary	-	-	-	
19 Endowments - Distributions & Fees	4,992	14,634	-	
20 Chapel	-	-	-	
21 Archives	-	-	-	
22 Lilly Grant	25,201	51,220	-	
23 Clergy Synaxis	5,500	13,000	-	
24 <b>TOTAL EXPENSES</b>	<b>41,800</b>	<b>89,855</b>	-	
25				
26 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>206,693</b>	<b>235,267</b>	-	

**ORTHODOX CHURCH IN AMERICA**  
Balance Sheet - FY2020 - **Preliminary & Unaudited**  
September 30, 2021

A	B	C	D
	<u>9/30/2021</u>	<u>12/31/2020</u>	<b>DIFFERENCE</b>
1 <b>ASSETS</b>			
2 Cash & Cash Equivalents - Operating	1,358,406	865,924	492,482
3 Cash & Cash Equivalents - Restricted	668,188	638,028	30,159
4 Petty Cash	426	853	(427)
5			
6 Accounts Receivable	422,022	120,996	301,026
7 Grants Receivable	-	-	-
8 Prepaid Expense	-	-	-
9 Other Current Assets	9,779	1,156	8,623
10			
11 Fixed Assets, net of depreciation	335,824	313,763	22,062
12 Investments	3,537,431	3,275,975	261,456
13			
14 <b>Total Assets</b>	<u>6,332,076</u>	<u>5,216,695</u>	<u>1,115,381</u>
15			
16			
17 <b>LIABILITIES</b>			
18 Accounts Payable	10,999	43,627	(32,628)
19 Accrued Expenses	-	-	-
20 Retirement Obligation	37,552	37,552	-
21 Unitrust Liability	100,527	106,527	(6,000)
22 Payroll Liabilities	3,519	(944)	4,463
23 Other Liabilities	-	-	-
24			
25 Note Payable - PPP Program (CARES Act)	-	-	-
26			
27 <b>Total Liabilities</b>	<u>152,597</u>	<u>186,762</u>	<u>(34,165)</u>
28			
29			
30 <b>NET ASSETS</b>	<u><u>6,179,479</u></u>	<u><u>5,029,934</u></u>	<u><u>1,149,545</u></u>

**ORTHODOX CHURCH IN AMERICA**

2022 Budget - Summary

*For consideration at Fall 2021 Metropolitan Council meeting*

			Target 75.00%	
	A	B	C	D
<i>Unrestricted</i>	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>Proposed 2022</b>
1	<b>REVENUE</b>			
2	1,334,353	1,683,455	79.26%	1,723,271
3	88,274	100,000	88.27%	100,000
4	13,600	15,000	90.67%	15,000
5	3,125	-		-
6	-	-		-
7	-	-		-
8	2,523	-		-
9	49,500	66,000	75.00%	66,000
10	51,000	33,615	151.72%	68,000
11	<b>1,542,375</b>	<b>1,898,070</b>	<b>81.26%</b>	<b>1,972,271</b>
12				
13				
14				
15	<b>EXPENSES</b>			
16	Compensation & Benefits			
17	163,049	221,016	73.77%	228,490
18	342,480	586,769	58.37%	582,062
19	71,660	94,544	75.80%	102,199
20	26,229	42,439	61.80%	-
21	-	-		-
22	6,579	24,426	26.93%	-
23	<b>609,996</b>	<b>969,194</b>	<b>62.94%</b>	<b>912,751</b>
24				
25	Goods & Services			
26	91,769	155,019	59.20%	180,190
27	47,816	55,700	85.85%	125,385
28	230	1,500	15.34%	1,500
29	10,110	21,500	47.02%	30,000
30	1,155	4,400	26.24%	4,400
31	107,195	125,430	85.46%	126,730
32	20,060	49,186	40.78%	78,500
33	24,160	66,300	36.44%	66,300
34	12,852	63,400	20.27%	68,400
35	2,668	32,450	8.22%	32,450
36	43,410	65,300	66.48%	73,710
37	-	-		-
38	-	10,000	0.00%	10,000
39	51,000	68,000	75.00%	68,000
40	-	12,000	0.00%	12,000
41	-	-		-
42	6,488	3,185	203.71%	32,755
43	-	9,000	0.00%	-
44	-	18,000	0.00%	18,000
45	86,327	168,506	51.23%	131,200
46	<b>505,242</b>	<b>928,876</b>	<b>54.39%</b>	<b>1,059,520</b>
47				
48	<b>1,115,238</b>	<b>1,898,070</b>	<b>58.76%</b>	<b>1,972,272</b>
49				
50	<b>427,137</b>	<b>(0)</b>		<b>(0)</b>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-05 Administration-Salaries	122,545.77	164,342.00		169,221.20
10-6011-05 Administration-Payroll Expense	197.85			
10-6012-05 Administration-FICA/MED	7,145.29	12,572.16		12,945.42
10-6013-05 Administration-Unemployment Ins W/H	3,601.01			
10-6014-05 Administration-Payroll Processing Fees	3,029.00	4,000.00		3,000.00
10-6015-05 Administration-Health Insurance	10,378.75	18,084.84		20,995.56
10-6016-05 Administration-Workers Compensation/Disabil	3,378.33	437.82		434.90
10-6017-05 Administration-Pension expense	10,433.16	13,629.20		13,943.21
10-6018-05 Administration-Life Insurance	2,339.80	7,950.00		7,950.00
	<u>163,048.96</u>	<u>221,016.03</u>	<u>73.77%</u>	<u>228,490.30</u>
10-6051-05 Charity	-	-		-
10-6092-05 Administration-Business Registration Fees	-	-		-
10-6095-05 Administration-Bank Fees	1,565.30	2,200.00		2,200.00
10-6096-05 Administration-Dues	-	1,600.00		10,000.00
10-6100-05 Administration-Office Expense	200.00			
10-6105-05 Administration-Food	1,957.90	3,200.00		3,200.00
10-6110-05 Administration-Flowers/Candles/Liturgical iter	671.28			
10-6210-05 Administration-Contract Services	4,038.00	3,000.00		-
10-6211-05 Administration-Accounting Fees	18,220.51	20,000.00		20,000.00
10-6214-05 Administration-Legal Fees	-	10,000.00		10,000.00
10-6215-05 Administration-Outside Contract Services	1,755.00	-		-
10-6290-05 Administration-Repairs Expense	526.96			
10-6502-05 Administration-Postage, Mailing Service	4,586.39	3,000.00		3,000.00
10-6503-05 Administration-Printing and Copying	-	2,000.00		3,450.00
10-6504-05 Administration-Supplies	3,769.89	3,000.00		3,200.00
10-6505-05 Administration-Telephone, Telecommunication:	-	3,000.00		-
10-6507-05 Administration-Equipment leasing	-	2,500.00		-
10-6511-05 Administration-Advertising Expenses	-	750.00		-
10-6512-05 Administration-Insurance - Liability, D and O	4,890.00	5,000.00		-
10-6516-05 Administration-Misc Other	-	-		-
10-6650-05 Administration-Stipends	8,492.00	11,400.00		71,400.00
10-6670-05 Administration-Computer expense	3,198.35	4,000.00		4,000.00
10-6671-05 Administration-Computer software	-			
10-6720-05 Administration-Telephone	2,507.91	4,600.00		1,200.00
10-6725-05 Administration-Mobile Phones	3,450.75			
10-6727-05 Administration-Internet	3,314.40	5,000.00		4,000.00
10-6733-05 Administration-Website	277.24	3,269.00		-
10-6750-05 Administration-Insurance	26,876.66	36,000.00		41,040.00
10-6831-05 Administration-Conference, Convention, Meetin	-	1,000.00		-
10-6832-05 Administration-Travel	398.80	12,000.00		-
10-6833-05 Administration-Lodging	-	-		-
10-6834-05 Administration-Meals	198.20	2,000.00		2,000.00
10-6900-05 Administration-Automobile	279.31			
10-6902-05 Administration-Auto repairs	15.20	-		-
10-6903-05 Administration-Auto gasoline	579.11	1,500.00		1,500.00
10-6910-05 Administration-Other	-	15,000.00		-
	<u>91,769.16</u>	<u>155,019.00</u>	<u>59.20%</u>	<u>180,190.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-07 Executive-Salaries	282,369.36	467,742.72		436,225.71
10-6012-07 Executive-FICA/MED	3,557.25	35,782.32		33,371.27
10-6014-07 Executive-Payroll Processing Fees	200.00			
10-6015-07 Executive-Health Insurance	32,965.44	36,169.62		68,592.30
10-6016-07 Executive-Workers Compensation/Disability	-	1,994.92		2,051.57
10-6017-07 Executive-Pension expense	23,387.80	45,079.66		41,821.19
	<u>342,479.85</u>	<u>586,769.24</u>	<u>58.37%</u>	<u>582,062.04</u>
10-6095-07 Executive-Bank Fees	-	-		-
10-6096-07 Executive-Dues	595.00			
10-6105-07 Executive-Food	56.63	-		-
10-6504-07 Executive-Supplies	360.35	500.00		3,500.00
10-6650-07 Executive-Stipends	35,500.00	39,000.00		75,000.00
10-6704-07 Executive-Gas	-	-		-
10-6720-07 Executive-Telephone	-	-		-
10-6725-07 Executive-Mobile Phones	837.62	5,000.00		5,000.00
10-6832-07 Executive-Travel	10,071.78	7,000.00		27,000.00
10-6833-07 Executive-Lodging	-	-		-
10-6834-07 Executive-Meals	395.08	1,200.00		1,200.00
10-6903-07 Executive-Auto gasoline	-	-		-
10-6910-07 Executive-Other Administrative Expense	-	3,000.00		13,685.00
	<u>47,816.46</u>	<u>55,700.00</u>	<u>85.85%</u>	<u>125,385.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-08 Archives-Salaries	48,614.40	64,819.20		68,837.99
10-6012-08 Archives-FICA/MED	3,536.01	4,958.67		5,266.11
10-6013-08 Archives-Unemployment Ins W/H		-		-
10-6015-08 Archives-Health Insurance	14,648.43	18,084.84		20,995.56
10-6016-08 Archives-Workers Compensation/Disability		198.97		215.60
10-6017-08 Archives-Pension expense	4,861.45	6,481.92		6,883.80
	<u>71,660.29</u>	<u>94,543.60</u>	<u>75.80%</u>	<u>102,199.06</u>
10-6092-08 Archives-Business Registration Fees	-	200.00		200.00
10-6105-08 Archives-Food	-	-		-
10-6280-08 Archives-Facilities and Equipment	-	-		-
10-6503-08 Archives-Printing and Copying	-	-		-
10-6504-08 Archives-Supplies	230.09	800.00		800.00
10-6832-08 Archives-Travel	-	500.00		500.00
	<u>230.09</u>	<u>1,500.00</u>	<u>15.34%</u>	<u>1,500.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-09 External Affairs-Salaries	23,999.20	35,998.80		-
10-6012-09 External Affairs-FICA/MED	-	2,753.96		-
10-6013-09 External Affairs-Unemployment Ins W/H	-	-		-
10-6016-09 External Affairs-Workers Compensation/Disabi	-	86.40		-
10-6017-09 External Affairs-Pension expense	2,229.36	3,599.88		-
	<u>26,228.56</u>	<u>42,439.04</u>	<u>61.80%</u>	-
10-6096-09 External Affairs-Dues	7,500.00	10,000.00		10,000.00
10-6215-09 External Affairs-Outside Contract Services	250.00			-
10-6253-09 External Affairs-Program Supplies	-	-		-
10-6504-09 External Affairs-Supplies	-	100.00		-
10-6650-09 External Affairs-Stipends				15,000.00
10-6670-09 External Affairs-Computer expense	-	-		-
10-6720-09 External Affairs-Telephone	-	1,000.00		-
10-6725-09 External Affairs-Mobile Phones	1,231.18			-
10-6831-09 External Affairs-Conference, Convention, Meetir	-	400.00		-
10-6832-09 External Affairs-Travel	1,128.80	10,000.00		5,000.00
10-6834-09 External Affairs-Meals	-	-		-
	<u>10,109.98</u>	<u>21,500.00</u>	<u>47.02%</u>	<u>30,000.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-11 Property Support-Salaries	-	-		-
10-6012-11 Property Support-FICA/MED	-	-		-
10-6013-11 Property Support-Unemployment Ins W/H	-	-		-
10-6015-11 Property Support-Health Insurance	-	-		-
10-6016-11 Property Support-Workers Compensation/Disability	-	-		-
10-6017-11 Property Support-Pension expense	-	-		-
	<u>-</u>	<u>-</u>		<u>-</u>
10-6100-11 Property Support-Office expense	-	-		-
10-6115-11 Property Support-Office Expense - Other	(769.51)	-		-
10-6215-11 Property Support-Outside Contract Services	19,606.00	13,500.00		13,500.00
10-6273-11 Property Support-Real Estate, Personal Prop Ta	32,854.32	32,855.00		32,855.00
10-6280-11 Property Support-Facilities and Equipment	-	-		-
10-6284-11 Property Support-Equip Rental and Maintenanc	-	-		-
10-6285-11 Property Support-Janitorial Services	600.00	-		-
10-6286-11 Property Support-Lawn	20,115.00	30,000.00		30,000.00
10-6287-11 Property Support-Exterminating	-	500.00		500.00
10-6288-11 Property Support-Garbage Removal	1,548.00	2,075.00		2,075.00
10-6290-11 Property Support-Repairs expense	-	1,500.00		3,000.00
10-6504-11 Property Support-Supplies	191.90	800.00		600.00
10-6701-11 Property Support-Heating oil	8,758.56	16,000.00		16,000.00
10-6703-11 Property Support-Water	100.89	200.00		200.00
10-6705-11 Property Support-Electricity	6,626.41	11,000.00		11,000.00
10-6750-11 Property Support-Insurance	-	-		-
10-6900-11 Property Support-Automobile	-	-		-
10-6901-11 Property Support-Auto insurance	-	-		-
10-6990-11 Property Support-Depreciation expense	17,563.89	17,000.00		17,000.00
	<u>107,195.46</u>	<u>125,430.00</u>	<u>85.46%</u>	<u>126,730.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6010-35 Sexual Misconduct Committ-Salaries	4,999.98	20,000.00		-
10-6012-35 Sexual Misconduct Committ-FICA/MED	382.50	1,731.96		-
10-6013-35 Sexual Misconduct Committ-Unemployment Ins	-	-		-
10-6015-35 Sexual Misconduct Committ-Health Insurance	1,196.09	2,640.00		-
10-6016-35 Sexual Misconduct Committ-Workers Compensa	-	54.34		-
	<u>6,578.57</u>	<u>24,426.30</u>	<u>26.93%</u>	<u>-</u>
10-6092-35 Sexual Misconduct Committ-Business Registrati	-	100.00		-
10-6095-35 Sexual Misconduct Committ-Bank Fees	-	-		-
10-6215-35 Sexual Misconduct Committ-Outside Contract Se	5,789.41	2,000.00		12,000.00
10-6502-35 Sexual Misconduct Committ-Postage, Mailing Se	-	55.00		55.00
10-6504-35 Sexual Misconduct Committ-Supplies	-	100.00		100.00
10-6650-35 Sexual Misconduct Committ-Stipends				20,000.00
10-6832-35 Sexual Misconduct Committ-Travel	698.66	930.00		600.00
10-6834-35 Sexual Misconduct Committ-Meals	-	-		-
	<u>6,488.07</u>	<u>3,185.00</u>	<u>203.71%</u>	<u>32,755.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2022 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6050-10 Chapel-Distributions	-			
10-6051-10 Chapel-Charity distribution	-	1,000.00		-
10-6105-10 Chapel-Food	296.78	800.00		1,000.00
10-6110-10 Chapel-Flowers/Candles/Liturgical item	269.12	500.00		800.00
10-6215-10 Chapel-Outside Contract Services	-	-		-
10-6504-10 Chapel-Supplies	238.70	100.00		600.00
10-6650-10 Chapel-Stipends	350.00	2,000.00		2,000.00
	<u>1,154.60</u>	<u>4,400.00</u>	26.24%	<u>4,400.00</u>
10-6215-13 Communications-Outside Contract Services	15,374.25	35,000.00		35,000.00
10-6503-13 Communications-Printing and Copying	-	686.00		-
10-6650-13 Communications-Stipends	125.00			30,000.00
10-6670-13 Communications-Computer expense	292.00	2,500.00		2,500.00
10-6733-13 Communications-Website	4,269.07	11,000.00		11,000.00
	<u>20,060.32</u>	<u>49,186.00</u>	40.78%	<u>78,500.00</u>
10-6105-14 Holy Synod-Food	-	-		-
10-6115-14 Holy Synod-Office Expense - Other	560.39	500.00		-
10-6502-14 Holy Synod-Postage, Mailing Service	5,668.39	-		-
10-6504-14 Holy Synod-Supplies	260.97	500.00		1,000.00
10-6650-14 Holy Synod-Stipends	11,600.00	14,400.00		14,400.00
10-6832-14 Holy Synod-Travel	5,785.06	36,000.00		36,000.00
10-6833-14 Holy Synod-Lodging	-	-		-
10-6834-14 Holy Synod-Meals	285.34	14,900.00		14,900.00
	<u>24,160.15</u>	<u>66,300.00</u>	36.44%	<u>66,300.00</u>
10-6092-15 Metropolitan's Office-Business Registration Fee:	1,065.52	1,900.00		1,900.00
10-6095-15 Metropolitan's Office-Bank Fees	-	-		-
10-6096-15 Metropolitan's Office-Dues	300.00	-		-
10-6110-15 Metropolitan's Office-Flowers/Candles/Liturgic	93.00	1,000.00		-
10-6253-15 Metropolitan's Office-Program Supplies	-	-		-
10-6504-15 Metropolitan's Office-Supplies	1,522.76	500.00		3,500.00
10-6610-15 Metropolitan's Office-Health Insurance	-	-		-
10-6667-15 Metropolitan's Office-Chaplains - Stipends	3,400.00	6,000.00		6,000.00
10-6831-15 Metropolitan's Office-Conference, Convention, M	-	1,000.00		1,000.00
10-6832-15 Metropolitan's Office-Travel	5,892.21	47,000.00		47,000.00
10-6833-15 Metropolitan's Office-Lodging	-	-		-
10-6834-15 Metropolitan's Office-Meals	481.93	6,000.00		6,000.00
10-6902-15 Metropolitan's Office-Auto repairs	96.97	-		-
10-6902-15 Metropolitan's Office-Other Discretionary				3,000.00
	<u>12,852.39</u>	<u>63,400.00</u>	20.27%	<u>68,400.00</u>
10-6105-16 Metropolitan Council-Food	10.00	2,400.00		2,400.00
10-6504-16 Metropolitan Council-Supplies	75.00	50.00		50.00
10-6832-16 Metropolitan Council-Travel	2,582.80	12,000.00		12,000.00
10-6833-16 Metropolitan Council-Lodging	-	18,000.00		18,000.00
10-6834-16 Metropolitan Council-Meals	-	-		-
	<u>2,667.80</u>	<u>32,450.00</u>	8.22%	<u>32,450.00</u>

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

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>9/30/2021</b>	<b>Amended 2021</b>	<b>USED</b>	<b>2022</b>
10-6095-17 St Catherine's Representa-Bank Fees	-	-		-
10-6110-17 St Catherine's Representa-Flowers/Candles/Li	-	300.00		300.00
10-6253-17 St Catherine's Representa-Program Supplies	-	-		-
10-6650-17 St Catherine's Representa-Stipends	35,249.94	50,000.04		53,100.12
10-6680-17 St Catherine's Representa-Pension expense	8,160.03	-		5,310.00
10-6832-17 St Catherine's Representa-Travel	-	15,000.00		15,000.00
10-6834-17 St Catherine's Representa-Meals	-	-		-
	<u>43,409.97</u>	<u>65,300.04</u>	<u>66.48%</u>	<u>73,710.12</u>
10-6502-20 SOCA-Postage, Mailing Service	-	-		-
10-6504-20 FOS-Supplies	-	-		-
10-6733-20 SOCA-Website	-	-		-
	<u>-</u>	<u>-</u>		<u>-</u>
10-6832-29 Theological Education Boa-Travel	-	10,000.00	0.00%	10,000.00
10-6050-30 Missions and Planting Gra-Distributions	51,000.03	68,000.00	75.00%	68,000.00
10-6215-34 Ordination Candidate Test-Outside Contract Se	-	12,000.00	0.00%	12,000.00
10-6832-38 Canons and Statues Commit-Travel	-	-		-
10-6215-39 Strategic Planning-Outside Contract Services	-	-		-
10-6504-39 Strategic Planning-Supplies	-	1,500.00		-
10-6650-39 Strategic Planning-Stipends	-	7,500.00		-
	<u>-</u>	<u>9,000.00</u>	<u>0.00%</u>	<u>-</u>
10-6050-40 Seminaries-Distributions	-	18,000.00	0.00%	18,000.00
10-6050-80 Ministries-Distributions	32,000.00	34,506.00		32,000.00
10-6092-80 Ministries-Business Registration Fees	-	-		-
10-6096-80 Ministries-Dues	400.00	-		-
10-6215-80 Ministries-Outside Contract Services	-	56,000.00		11,800.00
10-6253-80 Ministries-Program Supplies	337.40	-		-
10-6503-80 Ministries-Printing and Copying	-	1,500.00		1,500.00
10-6504-80 Ministries-Supplies	350.00	3,000.00		3,000.00
10-6515-80 Ministries-Memberships	-	12,000.00		12,000.00
10-6650-80 Ministries-Stipends	52,890.00	42,000.00		51,400.00
10-6733-80 Ministries-Website	350.00	1,500.00		1,500.00
10-6831-80 Ministries-Conference, Convention, Meeting	-	3,000.00		3,000.00
10-6832-80 Ministries-Travel	-	15,000.00		15,000.00
10-6833-80 Ministries-Lodging	-	-		-
10-6834-80 Ministries-Meals	-	-		-
	<u>86,327.40</u>	<u>168,506.00</u>	<u>51.23%</u>	<u>131,200.00</u>

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

Archpriest Thomas Soroka

October 15, 2021

Your Beatitude, Members of the Holy Synod and Metropolitan Council,

As a follow-up to my report given in the Spring of 2021, I will update you on the progress and production of the various departments.

The sole purpose of the departments is to serve the building up of the church, especially the parishes and faithful of the Orthodox Church in America. As our work continues to build, we need input from the leadership and faithful of the church so that we can provide resources and services that are most impactful and necessary. As the pandemic recedes, we will begin to develop opportunities in the various departments for the faithful to gather together in person rather than exclusively in online forums.

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

### **Department of Liturgical Music and Translations**

*Phillip Ritchey, Project Lead*

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

*Vladimir Morosan, Project Lead*

- **COMPLETE and ONGOING** (22 students): Basic Sight-Singing and Ear-Training Course for choir directors and singers who may be unfamiliar with basic musical concepts.
- **COMPLETE** (562 total registrations): Four webinars to prepare church musicians for the Pre-Lenten, Lenten, Holy Week, and Paschal Services. Registrants provided with a wealth of information and new music. Webinars are archived on YouTube.
- **NEW ONGOING:** Basic Conducting Course which is being held online. This is revamped from the previous course held by David Drillock.

*Fr Gregory Ealy, Project Lead*

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

### **Department of Evangelization**

*Fr Thomas Soroka, Project Lead*

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

*Melissa Graff, Project Lead*

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

*Fr Joseph Lucas, Project Lead*

- **PENDING:** Production of a series of new videos on various topics important to Orthodox Christians. They will have higher production values and will be branded as products of the OCA.

*Fr Matthew Markewich, Project Lead*

- **PENDING:** A new apologetics website which will feature articles mainly by OCA priests and informed OCA laypersons. The purpose of this site is to provide reliable, well researched materials on a variety of subjects which are currently being addressed online, sometimes by unreliable or questionable persons or sources. This site would be in answer to the growing number of independent voices on the internet which are causing confusion and even rebellion among some.

*Unassigned, Project Lead*

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

### **Department of Continuing Education**

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

- **ONGOING:** Production of 12 one-hour online seminars or educational forums on a variety of topics relevant to clergy and church workers, beginning in January 2021, called "Third Thursdays." Speakers have already been scheduled for most of 2021.
- **ONGOING:** Production of six 15 minute high-quality production videos on a pastoral approach to those dealing with Suicide, taught by experts in the field.

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

*Donna Karabin and Diana Pasca, Project Leads*

- **COMPLETE:** Production of links and tags to all current resources in the Department supporting His Beatitude's "Four Pillars" document.
- **NEW ONGOING:** Additional articles for Parish Ministry Resources.

- **PENDING:** Four live approximately one-hour long webinars on the topics based on “Compassion in Action” with guest speakers to address the topics.

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

*Fr David Subu, Project Lead*

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

*Fr Ronald Tucci, Project Lead*

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

*TBD, Project Lead*

- **PENDING:** All OCA-wide Bible-bowl activity beginning in Fall, 2021 (*Fr Thomas Soroka is currently leading this.*)

### **Department of Christian Education**

*Frs Alexander Koranda and Jonathan Lincoln; and Catherine Golitzin, Project Leads*

- **COMPLETE:** Weekly Online Church School for Middle School and High School Students provided openly for any students who wish to join (began Tuesday, September 22 at 7pm ET and ends on Tuesday, May 18)

*Unassigned Project Lead*

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

*Valerie Zahirsky, Project Lead*

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

*Eileen Mountain and Kathy Boraas*

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

In addition to these ongoing projects, I continue to coordinate the Catechism Project which is ongoing. Most chapters are currently in the editing phase, though there are two chapters (of 16) that have yet to be submitted. Our goal is to have all chapters submitted by the end of November and the editing process by the end of January. The text will then be submitted to the Holy Synod and assigned theologians for review. After that feedback, it will be formatted for publication to be released at the All American Council in July, 2022. The text will be made freely available to anyone for download and will be an ongoing work of refinement.

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

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

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

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

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

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

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

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

**Consultants** have the following responsibilities:

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

Importantly, we are in need of new, talented individuals who are willing to serve within the departments - specifically those who exhibit a high level of productivity and energy for such work. We are looking for creative ideas that are scalable and highly cost-effective. While the possibility exists for future expansion of departmental ministries, we want to use the next year to be a testing ground to prove the value of departmental work. We cannot rest on the laurels of past accomplishments. We must

find new ways to support parish and mission ministries in their important work. This is the only purpose for the departments.

In closing, having been in this position for 18 months, albeit during COVID which proved challenging, it is my observation that the Departments as they exist may reflect the needs of the church in a previous era. As we continue our work, it is necessary to review the Departments for relevance. The history of many, if not all of the departments reflected the need to encourage the development of materials and ministries which, for the most part, did not otherwise exist in the 1970s. The questions we must ask now are:

- What are the greatest needs of parishes and faithful in 2022 and beyond?
- What are the goals and opportunities for the Orthodox Church in America that give clarity to the mission of the departments?
- What interOrthodox ministries and resource providers make the work of certain departments redundant, if any?
- What roadblocks prevent the departments from developing effective materials and resources for the parishes and the faithful and how can they be overcome?

In order to answer these questions, I need the input of the Holy Synod, Metropolitan Council, and other leaders of the Orthodox Church in America.

I am happy to answer any questions you may have.

Respectfully submitted,

Archpriest Thomas Soroka

# Office of Pastoral Life

## Synaxis Program

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

The broad objectives of the program:

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

Since funding began, the Office has held three Synaxis gatherings:

1. March 23. His Beatitude, Metropolitan TIKHON was the invited speaker to open the Synaxis with over 40 priests and deacons. His Beatitude spoke about the importance of dynamic clergy care pointing to the fact that clergy are facing broader challenges than ever and church leadership needs to be based in prayer and reflection on experience.
2. June 15. His Eminence, Archbishop PAUL was the invited speaker to open the Synaxis with, again, over 40 priests and deacons. His Eminence spoke about his spiritual journey from a teenage acolyte at his local Greek parish, through seminary, the priesthood, and his consecration as a bishop. When participants were asked in an exit survey at this gathering: I feel I could trust my fellow clergy by sharing the joys and stresses in my life – 64% of the attendees strongly agreed and 31% agreed with the statement.
3. September 21. His Grace, Bishop ANDREI was the invited speaker to open the Synaxis with over 40 priests and deacons. His Grace spoke of the challenges in ministry and the blessing and gifts found in all stages of ministry from the youthful beginning to the final season and into retirement. When participants were asked in an exit survey at this gathering: I am interested in doing more Peer Learning – 100% of the attendees responded “Yes”.

After each opening speaker, the attending priests and deacons are organized into small breakout rooms. Every small group brings together priests or deacons with a variety of backgrounds and length of ordination, and are led by a trained facilitator. Small groups are given an hour and a half to discuss the bishop’s talk, challenging situations that have led to personal growth, as well as their own health as priests and deacons.

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

- 70% of the respondents had not attended any of the Synaxis gatherings.
- When asked why they had not attended, 46% cited ‘other obligations’ as the main reason.
- For those who had attend previous Synaxis gatherings, their main reason for attending were:
  - Attended previous gatherings and enjoyed the peer learning experience
  - Seeking further social engagement

Currently the Synaxis Program is conducting interviews with 25 OCA clergymen to gather information about their physical, spiritual, intellectual, and pastoral health relative to their ministry in parish life. A report from this qualitative interview project will be submitted to the Office of Pastoral Life in January of 2022.

The next Synaxis gathering is being scheduled for December of this year.

## **Thriving in Ministry**

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

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

Due to the pandemic, most in-person peer learning groups pivoted to online virtual meetings in 2020. Return to in-person peer learnings groups has been slow and careful in 2021. In August of 2021, a cadre of 9 clergy wives were trained to begin clergy wives peer learning groups and in October of 2021, 2 clergy and 1 layperson were trained to begin clergy peer learning groups. From this training initiative, it is anticipated that several new peer groups will be formed in the coming months.

The TiM program covers a large inclusion of priest and priest wives from North American Orthodoxy. Our current fifteen active groups include sixty-nine participants (forty priests and twenty-nine priest wives). In addition, the TiM program has formed a peer learning group of 5 Bishops representing 4 jurisdictions as well as a military chaplain wives’ group.

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

Financial challenges are found in many Orthodox parishes and within the hearts of parish priests as the economic consequences of the pandemic stress parish budgets. The TiM program asks peer participants to contribute \$300 per year to the TiM program. Participation in the first year is at no cost. The \$300 annual fee begins in the second year. As such, 2020 was to be the year we would begin to see a greater

revenue stream into our program. Archbishop Mark and the Diocese of Eastern Pennsylvania had budgeted funds to cover fees for their peer participants in 2020 and those fees were received into the TiM program. However, in light of economic hardships, the TiM Board decided to not pursue the collection of fees for 2020 but to allow another year to pass at no cost. This situation was communicated to the OCA administration and there is the need to consider ways and strategies to financially support the ongoing work of TiM. Additional financial support from dioceses with program participants - other than the Eastern Pennsylvania Diocesan – should be explored in the near future.

The pandemic disruption has provided an opportunity to learn a number of lessons:

1. In times of unexpected and significant change, the desire to thrive in ministry endures. Our facilitators report back to our program the resiliency and grit of front-line servants pastoring parishes through difficulties. Our peer groups prove vital to bolstering their courage and creativity.
2. Relationships are important. In the midst of adapting and adjusting the TiM program through the pandemic, we learned to pause to stay connected with the people TiM serves. Program challenges have a way of leading to relationship neglect. Nurturing relationships is important TiM work.
3. The greatest area of growth and interest in our program during 2020 and 2021 has been in the area of clergy wives. The appreciation and enthusiasm coming from this part of our program has been inspiring and energizing. We anticipate this happy development will lead to parishes that thrive ... even during these times of difficult transitions.

Moving forward into the third year of our grant, we will continue to return to in-person peer learning as possible. Some groups established in 2020 and 2021 will continue as virtual groups as they were conceived and organized along broad geographically lines making in-person gatherings not financially possible. This development was seen even before the onset of the pandemic as an inevitable part of the TiM program as geographical challenges make in-person peer learning difficult in many places across the United States, (including especially Alaska) Canada, and Mexico. The COVID-19 pandemic accelerated that development for us. We will support the return to in-person peer learning, continue to nurture our virtual peer learning groups, and help newly forming groups discern the best format for them to pursue.

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

In Christ,  
Father Nicholas J Solak

October 10, 2021

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

Most blessed master, bless!

By way of introduction, I am Father Kyle Parrott, priest at All Saints of Alaska parish in Victoria, British Columbia. As of September 7th, 2021 I have been serving as Acting Communications Director in a part-time capacity, stepping into the role that Father John Matusiak and Archdeacon Joseph Matusiak had previously filled.

Since coming on staff a month ago, I have begun taking on the oversight of the OCA's website, social media, and other official communications. I have been warmly welcomed in many online meetings with Chancery staff who have been very helpful bringing me up to speed.

In addition to being trained on the various communications channels in use by the OCA, I have been engaged in the last month in a variety of areas in which I will be working. This includes producing press releases, letters, statements, and other documents for the website and social media as requested by His Beatitude Metropolitan Tikhon, the Chancellor Alexander Rentel, and Secretary Alessandro Margheritino.

In the future, I hope to work with His Beatitude, the Chancellor, and the other Chancery and Department staff to help strengthen and streamline communication from the OCA. Some possible areas of development include:

- Implementing strong online media strategy.
- Bringing focus to official news publications by centering them around the activity of His Beatitude, Chancery, and Department work.
- Implementing publishing policies on our official communications channels such as the website and email.
- Implementing a release calendar for articles and statements surrounding liturgical events, public holidays, or special events.
- Simplifying our website and making it more user friendly.

I want to thank His Beatitude for the opportunity to serve and look forward to working with everyone going forward.

Yours in Christ,

Priest Kyle Parrott

# **20<sup>th</sup> All American Council Report**

## **Metropolitan Council Fall Session 2021**

### **Deacon Peter Ilchuk**

#### **Introduction**

On Wednesday July 28<sup>th</sup>, 2021, His Beatitude Metropolitan Tikhon officially announced the convening of the 20<sup>th</sup> All American Council, scheduled to take place at the Hilton Baltimore Inner Harbor Hotel from **Monday July 18<sup>th</sup> to Friday, July 22<sup>nd</sup> 2022**. The planning of the council then restarted, and much work has been done to prepare for the Council next summer.

The Executive Board of the FOCA has also begun planning for their 95<sup>th</sup> National Convention, which is scheduled to take place from Friday, July 15<sup>th</sup> to Monday, July 22<sup>nd</sup>, 2022 also at the Hilton in Baltimore.

#### **Preconciliar Commission**

Just prior to His Beatitude's announcement, the Preconciliar Commission reconvened to review the updates and guidance from the Holy Synod in regard to the Council. Based on the received guidance and after much discussion and deliberations, the theme of the Council was chosen to be "Becoming Vessels of Grace", along with a special focus on the different vocations within the Church. The Council budget was reviewed and, after consultation with the Central Administration, the Council assessments were set and invoices were submitted to the Dioceses for their remittance. Andrew Smith, the Treasurer of the OCA can provide additional information about the Council Budget and process if needed.

The next meeting of the Preconciliar Commission will take place in the next few months to begin work on the overall council agenda and to review the ongoing work of the local subcommittees that will be responsible for the local support in Baltimore.

#### **Local Committee**

The local committee, Co-Chaired by Fr. Ted Boback and Lisa Mikhalevsky, also met to review its role with the planning of the All American Council. The Chairpersons of the subcommittees met under my direction to review their roles and responsibilities for the operation of council. At this point, there is a lot of preplanning work begin done locally to be ready to activate those committees when the times comes. The recruitment of volunteers is currently the focus of the local committee. Once again, they are very excited to start up their work again and look forward to welcoming the Hierarchs, Clergy, and Faithful of the Orthodox Church in American to the Archdiocese of Washington.

## **General Updates**

The Hotel is open, and the staff is coming back on board after a lengthy furlough due to the pandemic, we also hope to be assigned our personal hotel representative, who will assist us on site before, during, and after the conclusion of the Council.

All of the major contracts that we traditionally need to sign have been negotiated and signed for the operation of the Council. The A/V company, our largest contract has been agreed upon within the council budget.

The Council Webpage is live on OCA.org and there is a direct link on the homepage for easy access. We will begin to post updates and resources as they become available in order to drive enthusiasm for the Council. I know that many of us are looking forward to seeing our friends and family in person for the first time in a few years.

A new online registration system will also be used. This system will provide us with a user-friendly way to register, process, and keep track of council attendees. It will also provide valuable data that is needed to assist the hotel in planning our event.

The youth program has also begun its preparations. Under the direction of Fr. Benjamin Tucci, a long-time council youth coordinator, the team has started to create its program and build their volunteer and staff numbers that will be needed to ensure a successful and fun program for our children and young adults.

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

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

## **General Timeline for AAC**

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

## **Conclusion**

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

Respectfully Submitted,

Dn. Peter Ilchuk, Council Manager

## Report of OCA Board Representative to the OCF Board - October 2021

Your Beatitude,

Master, Bless!

The Orthodox Christian Fellowship, our official pan-Orthodox campus ministry, has continued to grow and increase the intensity of its ministry efforts during the past year, amidst a continuously difficult set of circumstances.

As you know, the pandemic has disrupted much of OCF's traditional ministry model, as most colleges and universities closed their campuses to student residents. As a reminder, during this period, OCF heroically did not shy away from its mission and ministry, but leaned in to providing even more resources for students stuck at home or isolated away from campus including:

**OCF Small Groups-** Virtual small groups provide an intimate setting for college-aged students to connect with each other, check in, reflect, and be a source of Christ's comfort and love. Groups of 4-8 students facilitated by trained OCF Student Leadership Board alumni will gather weekly.

**Virtual Retreats-** OCF will offer three virtual retreats in Fall 2020 for college students. OCF is exploring options for their very popular college conference

**Discussion Series-** These facilitated conversations offer students an opportunity to join virtual OCF meetings to learn, grow in their faith, and connect with other students.

**Online Chapel-** College students will gather for prayer- Compline, Parkalesis, and various Akathists-

As campus life continues to come back to life, OCF is now tasked with keeping these new ways of ministry and outreach as well as rebuilding its grassroots campus programs and popular in-person events such as College Conference and Real Break. .

To that end, OCF for the first time in years, has added to its full time staff with the addition of a communications manager (Joseph Bray) and a ministry coordinator (Peter Mansour). Joseph is the first OCA member to be employed full time by OCF and Peter is a SVS grad from the Coptic Church known to many of us in youth ministry. They are of course complimented by the long-standing team of Deacon Marek Simon, Christina Andresen, and Donna Levas.

The OCA remains well represented and well-engaged in this ministry through our dozens of chaplains, guest speakers, our student leaders, and our board leadership which also includes Father Stephen Vernak and Father Alexander Cadman, Board Chair. Father Alexander is term-limited and will be rolling off the board at the end of 2021 after years of dedicated leadership.

Funding for OCF continues to be a concern, and the Board and staff have made incredible strides since the start of the pandemic to move away from a budget which relies on various student fees for support to one that includes robust fundraising, broader parish support, and

renewed financial commitments from the various jurisdictions that rely on OCF to support a robust campus ministry in place of their own. The OCA's commitment is valued and appreciated.

We thank God for invested board members, self-sacrificing and talented staff, and student leaders who continue to inspire and dedicate so much of their time towards their brothers and sisters.

Asking your blessing,

Andrew Boyd  
OCA Representative to the OCF Board

# Metropolitan Council

*As of October 8, 2021*

His Beatitude Metropolitan Tikhon

*Archbishop of Washington and Metropolitan of All America and Canada*

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<p><b>Committee Codes:</b> FI = Finance and Investment HR = Ethics and Human Resources IG = Internal Governance</p>	<p>LE = Legal PR = Property TH = Technology</p> <p><b>Bold/Italic = chairperson</b></p>