

## REPORTS OF THE OFFICERS OF THE ORTHODOX CHURCH IN AMERICA

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This report has been prepared to introduce the work of the Officers of The Orthodox Church in America for the Sixteenth All-American Council to be held in Seattle, WA from October 31 through November 4, 2011.

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

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

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# INTRODUCTION

There have been a number of changes in the Officers of the Orthodox Church in America since the Fifteenth All-American Council. The position of Director of Ministries and Communications was eliminated on December 31, 2009 due to financial considerations. The work of the DMC was divided between the Chancellor and the Secretary. Specifically, the Department oversight was given to the Chancellor and Communication to the Secretary. The work was able to continue without interruption. There is no plan to replace the DMC, however, the work was able to continue through the hiring of two part time communications people (Website Managing Editor and Technical Manager). In November, 2009, the Treasurer resigned in order to take a new job in California. After a search was initiated, a new Treasurer was appointed in January, 2011 as a part time position, splitting time with work as the Chief Financial Officer of St. Vladimir's Orthodox Theological Seminary. Due to financial considerations, the position of Controller was eliminated on December 6, 2010. However, with the reorganization of the financial office with regular external and internal audits as well as the implementation of the Blackbaud accounting system, work continued uninterrupted.

As was well reported, the Metropolitan asked for the resignation of the Chancellor on February 25, 2011. This was brought before the Holy Synod who accepted the resignation. The Holy Synod appointed an Interim Chancellor and initiated a search for a new Chancellor. As of the time of this report, a new Chancellor has not been appointed. In addition, the Treasurer has also changed.

Included in this report are the latest job descriptions for the officers. It should be noted that the job descriptions do not fully contain all the work and responsibilities of the Officers. All of them perform many different jobs and functions that could not be contained in a short description. However, the main functions are outlined. These job descriptions were originally written and approved through the work of the Organizational Task Force, which completed their work by the time of the last All-American Council. They are open to review and editing through the newly formed Human Resources Committee of the Metropolitan Council. It is expected that the results of the Strategic Plan may call for a new look at the organization of the Central Church Administration.

Finally, it should be noted that the Officers of the Church are a requirement of the Statute of the Orthodox Church in America and New York State Corporate Law. They are guided by Best Practices as well as other laws pertaining to a New York State Non-Profit Corporation. They are appointed by the Holy Synod upon recommendation by the Metropolitan Council (Article II, Section 7m). They are expected to have annual reviews.

The Officers of the Orthodox Church in America are accountable to the Holy Synod and the Metropolitan Council. They offer reports at every meeting. The Chancery office is open for anyone to come and see. Their work is essential in maintaining the unity and integrity of the autocephalous Orthodox Church in America in both canon and civil law.

# JOB DESCRIPTION OF THE CHANCELLOR

## SUPERVISORY AND JOB CONTROLS

Is assigned areas of responsibility and scope of decision-making by the Metropolitan. Serves the Metropolitan as a trusted assistant and is accountable to the Metropolitan and Holy Synod in assigned areas. In accomplishing work, follows legal, regulatory, and established Best Practices and Policies for Financial Accountability of the OCA, keeping the Metropolitan informed of all non-routine issues and decisions. Work is assessed in terms of overall accomplishments, timeliness, and responsiveness to the needs of the Church, within assigned areas.

## MAJOR DUTIES

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

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

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

Performs other duties as assigned.

## JOB REQUIREMENTS

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

# REPORT OF THE INTERIM CHANCELLOR BISHOP MELCHISEDEK

## INTRODUCTION

By the decision of the Holy Synod on February 24, 2011, I was appointed as the Interim Chancellor of the Orthodox Church in America. In addition to my many responsibilities as Bishop of Pittsburgh and the Diocese of Western Pennsylvania and as the *Locum tenens* of the Bulgarian Diocese, I have attempted to keep a fairly regular schedule by coming to the Chancery of the Orthodox Church in America every week, usually from Tuesday through Thursday. There is no question that the tasks that come to the office of the Chancellor can only be properly handled by a full-time position. Therefore, what I have been able to accomplish, and not accomplish, should be understood within the context of the part-time position that it currently is. Under the present circumstances, only the more urgent and critical issues have been addressed.

His Beatitude, Metropolitan Jonah's visits to the Chancery have been infrequent, but when they did occur, we always met to discuss current situations. I also profited from contacts with, and help from, members of the Lesser Synod. I have participated at two meetings of the Lesser Synod that have taken place at the Chancery. My seven months at the Chancery have been very busy, even to the point of exhaustion. In fact I was in Long Island when sudden illness struck which required surgery and a week of hospitalization. I am grateful to the Chancery staff and to Fr. Leonid for their assistance during my sickness and convalescence. Being the Interim Chancellor only confirmed my estimation of the importance of the duties and functions of the Central Church administration. I believe that the efficacy and stability of the Chancery directly affects the dioceses and parishes of our Church. The business of the Central Church is simply the "business of the Church," and as such it may resonate on any level, personal, parish, diocesan or international. All of the components of the Church, that is the parishes, the dioceses and the central Church, share certain canonical and ecclesial dimensions.

While the Chancellor's duties include oversight of the entire Chancery of the Orthodox Church in America most of the routine issues (such as coordination of the Chancery staff, employment matters, planning and execution of meetings, management of the estate, etc.) are ably handled by Corporate Secretary, Fr. Eric Tosi. He also has other responsibilities and obligations, about which you will learn by reading his thorough report. Fr. Eric has been a right hand to me during this difficult interim period and I greatly appreciate his help.

## PASTORAL AFFAIRS

The major tasks that have occupied me as Interim Chancellor have been related to various aspects dealing with pastoral affairs. The challenge with these issues is that cases and problems can be quite diverse. Diocesan clergy issues are routinely handled by the respective diocesan hierarchs. However, there are times when diocesan bishops call on

the Chancellor for help in facilitating intra-diocesan transfers or for assistance in other matters. Then there are the cases that are directly addressed by the Chancery of the Orthodox Church in America. These cases are traditionally subject to the authority of the Primate of the Church. Issues here deal with seminary ordinations, placement of seminary graduates, receptions and transfers to other canonical Orthodox jurisdictions, and the application of various disciplinary actions. Because Metropolitan Jonah's schedule keeps him very busy, the Chancellor handles many of these issues.

During the course of a week, there various pastoral issues arise. Sometimes we experience a deluge of queries and requests from diocesan bishops, parish priests, chaplains, monastics or lay people. A good many of such issues can be quite simple and routine (such as letters of introduction, permissions to travel, reference letters for intra-jurisdictional purposes). Other cases are specialized and complicated. There are, of course, patterns and categories that situations do fall in, but there is no "one-size-fits all" formula nor one set of solutions that can be applied. The diverse character of the parishes of the Orthodox Church in America mirrors the diversity found among the clergy. In addition to internal pastoral issues, the Chancery is frequently confronted with situations involving clergy from other Churches and other countries. In tackling these situations, I have benefited from discussions and input from members of the Holy Synod, Chancery personnel, seminary professors and others who have pastoral, canonical and legal expertise.

## EXTERNAL AFFAIRS

Together with pastoral matters, there are pan-Orthodox and ecumenical concerns that come to our attention. The Orthodox Church in America has been fortunate in that, for the last thirty years or so, Fr. Leonid Kishkovsky has functioned in various capacities as the Church's External Affairs Representative. Recent illness has slowed him only a bit, and we are grateful that he retains his enthusiasm and dedication for work in this important area. I have relied on his assistance on a variety of issues and I attest to his positive contributions to the Church and to his beneficial promotion of the image of the Orthodox Church in America in whatever sphere, circle, conference or gathering that he is involved in.

We are currently witnessing ever-shifting pan-Orthodox relationships throughout the Orthodox world. As the youngest autocephalous Church, whose canonical legitimacy is not yet universally recognized, the Orthodox Church in America faces many challenges, both within North America and on the world stage. The recent creation of the Episcopal Assemblies has accelerated the need for pro-active involvement for our Orthodox Church in America. Navigating canonical channels is sometimes fraught with unseen dangers, but we maintain our course with determination. Modest efforts though they may be, our Church has maintained its presence here and abroad, and is recognized for our commitment to foster and create Orthodox unity in North America.

With the blessing of His Beatitude, Metropolitan Jonah, I have been directly involved in several high-level meetings with hierarchs from other canonical jurisdictions. These

included in-depth conversations with His Eminence, Metropolitan Hilarion, the First Hierarch of the Russian Orthodox Church Outside of Russia and His Eminence, Archbishop Demetrius, Primate of the Greek Orthodox Archdiocese of America. I have been able to utilize my monastic experience in Greece on several occasions in the course administrative issues that came up at the Chancery.

## SEXUAL MISCONDUCT ALLEGATIONS

A good deal of time has been expended on various aspects of pastoral misconduct matters. In many of these instances I have worked with the Sexual Misconduct Policy Advisory Committee (SMPAC). Because this arena of Church life has become so important and so controversial, some background information here may be helpful.

The Orthodox Church in America created the Office for Review of Sexual Misconduct Allegations (the “Office”) in 2003, at the same time that the Holy Synod of Bishops adopted the “Policies, Standards and Procedures of the Orthodox Church in America on Sexual Misconduct” (PSP). The Office is under the authority of the Metropolitan of the Church and supervised on a day-to-day basis by the Chancellor. Until 2009, Archpriest Alexis Karlgut was assisting the Chancellor in cases of allegations of sexual misconduct. In 2009, His Beatitude, Metropolitan Jonah appointed the SMPAC to assist the Office and the Chancellor in such cases. The original and current members of the SMPAC are Archpriest Michael Matsko, Archpriest Theodore Bobosh, Protodeacon Peter Danilchick, Dr. Nikita Eike and James Spencer. Both the Chancellor and Secretary of the Orthodox Church in America serve in *ex officio* capacities.

The SMPAC came into existence as a result of discussions among the members of the Holy Synod, Metropolitan Council and the Chancery officers, when it became apparent that the PSP and the Office of Review were in critical need of re-evaluation. The problem of sexual and pastoral misconduct is certainly not new within the Church. However the style and manner of addressing such cases has changed dramatically during the past ten years or so. Regrettably the Orthodox Church in America has not been exempt of serious cases of allegations of sexual and pastoral misconduct, a dozen of which have occurred in the past four years, and which continue to occur. Addressing this problem, both in terms of trying to prevent misconduct and in responding promptly to allegations, has been a priority for many years; it remains a critical issue still far from satisfactory resolution.

As the name indicates, the SMPAC acts as in an “advisory” group, and is not the “investigative” committee in cases of allegations of sexual misconduct. Individual members of the SMPAC have, on occasion, served as consultants and occasional members of investigative teams. However, in its advisory capacity this committee has become extremely important at the present time. In any particular case, several levels must be considered in order to form a proper investigation that would produce a correct resolution. These include matters of spirituality and morality, civil and criminal law, psychological and medical concerns, as well as a variety of legal aspects. Because misconduct cases today necessarily requires this multi-dimensional approach, the diverse

composition of the SMPAC became a valuable asset in assisting the Chancellor in various advisory ways when it was necessary to address complaints of sexual misconduct that came to the Chancery.

The SMPAC's initial objective was to seriously review the existing PSP, to edit where needed, to update where required, and to re-write where necessary. Several meetings, face-to-face and telephonic, were conducted for this purpose. His Beatitude, Metropolitan Jonah was present at the initial meetings. In their work on the PSP, the SMPAC began to realize that, while critical changes needed to be amended to the existing document, a major re-write of the PSP was necessary. Concurrently with the discussions about the PSP, the SMPAC was consulted on a number of cases of sexual misconduct. In reviewing the manner in which the Orthodox Church in America was addressing allegations of sexual misconduct, the SMPAC noted critical areas of concern and presented their findings to the Holy Synod.

Joint meetings between the Holy Synod and the SMPAC have now begun to improve the manner in which the Orthodox Church in America responds to allegations of sexual misconduct. Discussions within the Holy Synod, within the Metropolitan Council and at sessions where both bodies met together, have been productive. In moving forward positively, we are always mindful of being both, the Church, where scriptural, canonical and pastoral principles are paramount, and of being law-abiding and ethical citizens in a civil society. The Orthodox Church in America, not unlike other churches, is shaping and re-shaping its policies and procedures in a process of learning, often learning from mistakes. The more we learn, the better our policies and procedures become. The SMPAC's project of re-writing the PSP is still in early stages. Although the critical areas requiring revision have been identified, and even though changes affecting policies and procedures have been put into effect, still needed is additional study and additional input from professionals. The new PSP may not achieve perfection, but it will actualize the high standards of oversight, investigation and review that we should expect our Church, that is our clergy and our people, to follow.

## OTHER ADMINISTRATIVE ACTIVITIES

During the time that I have spent at the Chancery, I have come to appreciate the wide diversity of things that affect the Administration of the Orthodox Church in America. There is a constant influx of concerns and problems, which come in with unrelenting regularity. The small staff struggles to keep up with it. The on-going conversations about what the central Church should be engaged in as opposed to Diocesan administrations have been part of on-going conversations in the Holy Synod and Metropolitan Council. This has also been a topic of consideration within the Strategic Plan. We still must await the arrival of a solution that is mutually accepted. However, the scope and importance of the tasks that come to the OCA Chancery will always need to be addressed, specifically there, on the level of the central Church administration.

On many occasions, I have come to rely on the good advice of the General Counsel of the Orthodox Church in America, Thaddeus Wojcik. Together with the members of the

Metropolitan Council's Legal Committee, chaired by Gregory Nescott, Mr. Wojcik has become a regular advisor on a variety of critical and complicated issues.

## CONCLUSION

In conclusion, I would like to commend the entire staff of the Chancery. I had known some of the staff previously and some of them I have come to know during this time. In observing and working with these people I commend their skills, their dedication and their industriousness. The working circumstances at the Chancery have not been ideal, but that has not deterred the spirit and good will of the staff. I pray that soon I will return to full time diocesan responsibilities, but I will leave knowing that the next Chancellor will have a dedicated group working with him for the glory of God and for the building up of the Orthodox Church in America.

**Bishop MELCHISEDEK**

**Bishop of Pittsburgh and the Archdiocese of Western Pennsylvania**

**Interim Chancellor**

# JOB DESCRIPTION OF THE SECRETARY

## SUPERVISORY AND JOB CONTROLS

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

## MAJOR DUTIES

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

against jointly established timelines and goals as part of regular meeting agendas.

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

Performs Other Duties as Assigned

## JOB REQUIREMENTS

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

# REPORT OF THE SECRETARY ARCHPRIEST ERIC GEORGE TOSI

*“As Christians we are here to affirm the supreme value of direct sharing, of immediate encounter — not machine to machine, but person to person, face to face.”*

Bishop Kallistos (Ware) in *The Mystery of the Human Person*

## INTRODUCTION

There is a wonderful story from the *Philokalia* about an obedience given to a young novice. The abbot placed a stick in the ground and the novice was instructed to water the stick every day. So every day, the novice did as he was instructed; he watered the stick. The stick being a stick did nothing. After some time, the novice went to the abbot and stated that the obedience was fruitless and that the stick had not grown. The abbot replied “but you have.” In such a way, I feel that while my work may seem repetitive, in fact it produces great fruit and I have grown. After three years in the position of Secretary, the countless hours of toil, the innumerable phone calls and emails, meeting after meeting, moving from one demanding situation to another, it would be easy to dismiss this all as “fruitless.” But it is not.

In fact, all of this work is incredibly important to the life of the Church because I am able to look back and see the many, many people whose lives I have touched, and in turn and more importantly, whose lives have touched me. Whether it is helping a widowed clergy wife arrange for health insurance, working with a diocese or parish with an administrative issues, working with the many committees and commissions that are all doing good for the life of the Church, working with the Synod of Bishops and Metropolitan Council, and even having to face each new challenge or crisis as they arise, all of it provides a real sense of purpose for the position. We have to remember that this is the first time that the Church has had a full time corporate Secretary and so there was a real learning curve as the position developed and found its place in the life of the Church. Now it would be almost impossible not to have such a position responsible for the administrative life of the Church. But it must be remembered that it is NOT a bureaucratic position, as some have suggested, but rather it is a really pastoral position. Administration and pastoral care are not contradictory but rather complimentary in the best sense of the word. As the Apostle Paul states, “*Let all things be done decently and in order.*” (1 Cor 14:40). Almost every aspect of my job is pastoral and that is the way in which I strive to approach it. And I believe that the many people who I have worked with over the past years would attest to that.

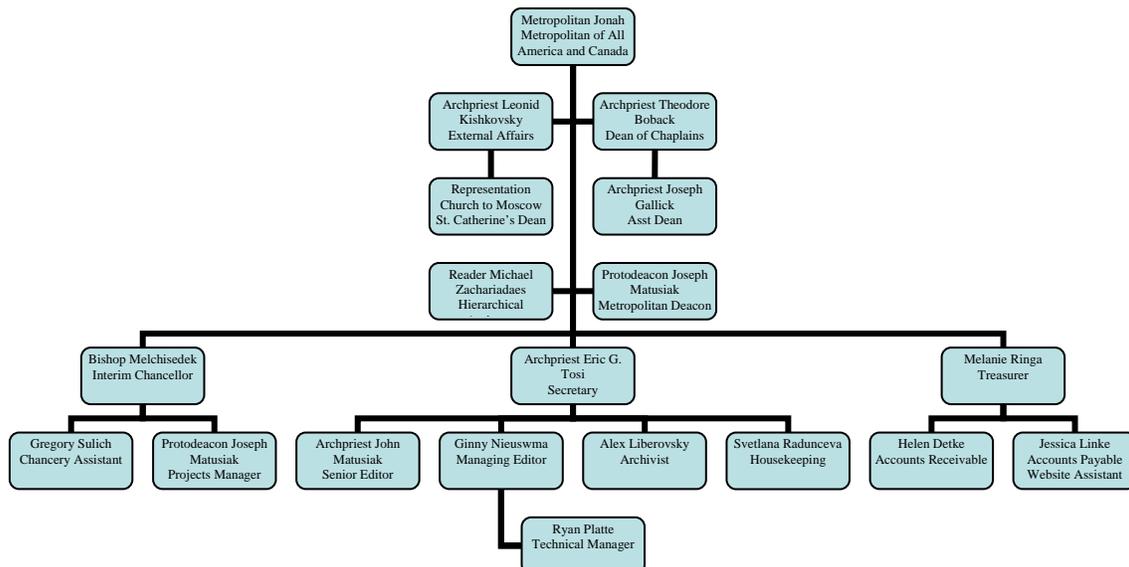
I must, however, extend the deepest appreciation for the people with whom I work with on a daily basis. These include the bishops and clergy, the Chancery staff and the many volunteers, the members of the departments, boards, commissions and committees, all of whom have a hand in the operation of the Church. Often they are invisible, doing their

jobs for the love of God and for the Church. They spend many countless hours, often quietly, and receive very little recognition for their work. Many work for the Church without any remuneration and if we added this up, there would be no way the Church could afford their work. Often one does not think where a press release comes from, how an account is processed or a program of the Church is managed, where files are maintained or even how a crisis is addressed. There is a person or persons behind every action of the Church. Sometimes they rise to heroic levels and sometimes they fall short as all humans do in their life. But never discount their dedication or love for the Orthodox Church in America. They all deserve a thanks and prayers. None of us could do what we do without them working quietly and with dignity despite what may be heaped upon them. There are many hours of work done behind the scenes which will never be known or even speculated but rest assured that this work is being done with competence. I would also add that when people say “Syosset” is broken, I would resoundly cry, “it is not”. Spend one week there and you will come away wondering how much gets accomplished with so few people. Everyone on the Chancery team performs a multitude of jobs that are outside of their description and have to wear many hats. The Chancery is a team that works well together, loves one another and is very conscious of that the work they do is on behalf of all of you. We fully understand that every single dollar comes from a loving donation to the Church and we are expected to be wise stewards. So we work hard to be accountable, transparent and responsive.

## SUMMARY OF WORK IN MAJOR AREAS

### ADMINISTRATIVE

The position of Secretary calls for the managing of the Central Church administration. As set forth in Organization Task Force recommendations in 2006, there was a major reorganization in the jobs and responsibilities of the Chancery. This reorganization cut almost \$500,000 from expenses through streamlining the organization and ensuring dedicated jobs to particular areas of the operation. The staff was lowered from over 30 people to around 9 on-site employees with an additional 3 part-time contracted employees. Of the 9 on-site employees, only 5 are full-time and 4 are part-time. Other positions are shared with either parish or secular employment. All of the employees work many jobs beside the one they are hired. The chart below shows the current Chancery structure:



Please note that of the Officers of the Church, the Interim Chancellor (Bishop Melchisedek is, of course, the bishop of Western Pennsylvania) and the Treasurer (Melanie Ringa also works at St. Vladimir's Seminary) are part-time. Fr Leonid Kishkovsky shares his duties with his parish in Sea Cliff, NY. Fr Theodore Boback (stipend) shares his duties with the parish in Baltimore as does Fr Joseph Gallick (stipend) shares his duties with his parish in Natick, MA. Protodeacon Joseph Matusiak (salaried part-time) also splits his time with St. Vladimir's Seminary. Fr John Matusiak (stipend), managing editor of *The Orthodox Church*, senior editor for the website and main responder to [infor@oca.org](mailto:infor@oca.org), of course, has a parish in Wheaton, IL. Ginny Nieuwma (managing editor) and Ryan Platte (technical manager) are part-time contract employees that manage all aspect of the website. Helen Detke (part-time salaried), long time employee of the Chancery, is part-time accounts receivable.

In short, the Chancery relies on many part-time employees and volunteers in its operation. Most of them perform many duties beyond their responsibilities with a small full time staff to oversee or do the actual work. Jessica Linke, for example, is accounts payable, receptionist, website assistant, edits many of the publications...and directs the chapel choir. One of the major issues over the past three years was trying to establish stability in the Chancery office, but with three of the four Officers being replaced as well as the change over in supporting staff, this has been difficult. But the continue dedication of the Chancery staff has ensured that the work has progressed.

As an additional note, all employees have a job description and their performance is reviewed annually by the Officers. There is now a handbook for guidance and strict policies on best practices (every employee is required to sign best practices documents annually). These are, in turn, overseen by both the Human Resources Committee and Internal Governance Committee of the Metropolitan Council. All employee records and files are examined by the Internal Auditors and have received excellent reviews. There are weekly electronic timesheets which are reviewed by the auditors and me. There are other forms now in place which ensure effective human resources operations. So while the staff is stretched, the work of the Chancery is still being done with the highest professional standards.

## COMMUNICATION AND WEBSITE

While this particular area was not on my original job description, the responsibility was tasked to the Secretary. This particular area takes a lot of time to manage to ensure the highest quality of communications with the Church. In fact, it is the face of the Church. We began by ensuring that a strong and consistent team was assembled. The team meets by phone once a week and prioritizes the stories. In addition, there is daily email communications between the team and myself to work through the many areas. As such, we have seen a much improved communications that rests upon accuracy and timeliness. But we must remember that the team is part-time and can be stretched during the week. The priority is to remain within the budget so sometimes certain stories or improvements must be delayed because the weekly time allotment is reached.

After an extensive search the Chancery hired Ginny Nieuwma as Managing Editor. She has incredible experience in writing and managing websites. She was hired as a part-time contract employee and oversees the website. She is teamed with Ryan Platte who is the technical manager of the website. He is also a part-time contract employee and manages the technical side of the website. So every blip or incorrect link or technical problem is addressed by him. One of the focuses was to ensure a timely response to issues so the team is on Zendesk, a program which assists in prioritizing and assigning requests. As such we are in 24 hour turn around for most problems. It must be remembered that they are part-time and we are very conscious of the hours they spend on the site. A report by Ginny is attached.

Much of the writing of stories is done by Fr. John Matusiak as senior editor. He spends countless hours writing and posting them. In addition, Fr John answers every question posted at [info@oca.org](mailto:info@oca.org). These can sometimes run over twenty requests a day. There is no other place in the Orthodox world that does this. He ensures consistency in writing styles as well as bringing a strong institutional knowledge of the OCA to the team. The team is also assisted by Jessica Linke, who in one her many tasks, posts stories and updates to the website. Our record time for posting is now in minutes whereas before it may have taken days. The team often works through the weekends when there are important stories. The goal was to have one story a day posted on the website, something we have surpassed very often. There is no other place in the Orthodox world which has such a depth of the stories. But it must be noted that we would rather delay a story so that it is accurate rather than post something that we are not sure. The website is the official organ of the OCA so if a story is not immediately forthcoming, that is because it is being delayed and checked for accuracy. While the team does scour the OCA for stories, we would remind people to send in articles and suggestions to the team because we cannot post what we do not have.

As part of the upgrade in communications, the Chancery undertook an extensive rebuild of the website. The technology and format of the site was simply outdated. Many sections were in danger of collapsing. After an extensive examination and review of the site, including input from the Holy Synod, Metropolitan Council, departments and other experts, a prospectus including a budget was written and released for bid. The result was many applications for two areas, the redesign of the website and the rebuilt technology behind the website. The website team selected J.D. Griffan of Simple Focus for the redesign and Fr. John Schroedel for the new technology. The site was completely redesigned including the move to Expression Engine as the managing software. It will be linked to the Blackbaud managing software now in use at the Chancery for a total integration of all technology. The new website team was rounded out with Ginny as project manager and overseen by myself. It took months of work and direction, countless hours of conference calls and meetings, and in the end, we now have the best Orthodox website in the world. And this all came in on budget. Many of the inputs from various sources were integrated and when launched, the OCA website had a record number of hits. It is now easier to navigate, secure, responsive and professional. It is also accessible to all of the new technology including smart phones. But it is not complete as there will be continuing upgrades throughout the next year including a revised biography of saints,

a section in Spanish, integration of video, a new dedicated program from Scripture readings, as well as some other important technological upgrades. This is all being done on a schedule within a fixed budget so the upgrades will be spread throughout the next year. The team is always looking for suggestion on how to improve the website.

While I am not directly responsible for *The Orthodox Church* magazine, I did manage some of the new policies. It is still an important face of the Church. It was decided to stay with a magazine format and to be more story rather than news oriented since the website is now the more important of the communications tools for news. Many printed magazines throughout the country are facing challenges due to increased printing and mailing costs. It was decided to go to a quarterly format that would be delivered in bulk to parishes. This represented a substantial cost savings which allowed for the magazine to continue to be printed quarterly. Otherwise, the option was to have it only electronically posted. Recognizing the continued desire by many to have a printed magazine and after examining many options, this was the one selected. It has been fairly successful and much thanks goes to Fr. Leonid Kishkovsky and Fr. John Matusiak for continuing this important part of our Church. There has been the suggestion to go back to mailing to every member of the OCA which would be costly and require a continual update of the mailing list which has been problematic in the past, especially with a reduced staff. There used to be a dedicated person managing the mailing list but staff cuts has eliminated that position. But as we move forward with the transition of the database from Access 95 to Raiser's Edge (part of the Blackbaud system), this will allow for an updating of the database in the coming year. Again, the staff of the TOC is always looking for stories and contributors.

The Chancery decided to forgo the publication of an annual Sourcebook. It was costly to produce and required many hours of work that the staff simply did not have the time. In addition, all the information that was found in the Sourcebook is now online. However, we will continue to publish an annual Church calendar in the Fall of each year. There are plans for new sacrament certificates which will be computer friendly and available at no cost to parishes.

Finally, in the area of communications is the question of responsiveness. It is a policy of the Chancery now to answer all calls within hours whereas before it may have been days. We also have been utilizing new technology in dedicated message boards, emails, teleconferences and emails. The new technology allows for further cost reduction and greater meeting flexibility. We are also looking into video conferencing for the future. Often, I am responsible for organizing and managing these areas. There are a number of teleconferences each week as various committees and groups meet. In addition, there are the numerous emails to the Chancery. On average day I handle well over a hundred (or more) emails on various issues. Each one receives a response (I often start out my day spending more than an hour just answering emails). This is a part of the responsiveness of the Chancery that works on your behalf.

A final word about the server and other hardware. We host a server on site and utilize another server off site for security reasons. In the past, there were attempts to hack into

the server which were thwarted due to the excellent work of our contracted server manager, Rich Tirpak. Over the past two years, we have migrated much of our technology and communications capabilities to a new and more secure site with new and improved software. This has lowered the number of attempts and we are reasonably confident of the security of our communications. But we are ever vigilant!

## CHURCH COUNCILS, SYNOD AND MEETINGS

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

The most important of these is the triennial All-American Council of which I have immediate oversight. I am assisted by a very competent Preconciliar Commission (Chaired by His Grace Bishop Benjamin), Council Manager (Fr. Myron Manzuk), Logistics Manager (Peter Ilchuk) and local committee (chaired by Fr John Peirce and Ms Lynell Brunswig). So much gratitude must be given to them for their tireless work and countless hours spent in planning and organizing this Council. We began this process over two years ago and worked through so many issues including site selection, contract negotiations, interface with the Strategic Planning Committee, agenda planning and report preparation. Each step was well organized and done with a real sense of conciliarity. The success of this Council is because of the many hours dedicated to planning and organizing it. One may not realize the many details that need to be addressed from menus, to the liturgics to even selecting the colors of the table clothes. Each detail was addressed and completed on schedule despite a few bumps.

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

I also serve as the Chancery liaison for many of the committees. So countless hours are also spent in attending meetings on a range of areas from departments, legal to strategic plan to Sexual Misconduct Policy Review and so on. The Church operates through these

committees which are often staffed with devoted volunteers and need the dedicated work of the Secretary to organize them. Very often, my week is taken up by meetings which are essential for the operation of the Church. I also serve as a voting member of the Metropolitan Council and may be called upon to assist in chairing the meetings.

## ARCHIVES

A full report on the work of the archives is attached. We are very thankful for this unique treasure of the Church. The archives contain so much of the written history of our Church including private collections of many of our more famous and respected Church leaders. It also contains the records of the Church that stretch back centuries. This treasure is currently housed in the basement of the Chancery building and overseen by our very competent archivist, Alexis Liberovsky.

What most people do not realize is the utility of this valuable resource. Hardly a week goes by without a visitor to the archives doing research. The archives are also used daily by the staff in the operation of the Church. These are effectively handled by Alexis. It is hoped that in the future, the Church will receive a grant to digitize this resource and make it available for researchers online. In addition, we MUST take immediate steps to preserve this treasure by digitizing and finding a more suitable home. While the basement is not optimal, we did place certain preservation controls including humidity and temperature control. But these are only a stop gap. If we can find the right grant, a new state-of-the-art archives building and meeting space could be built on the grounds of the Chancery. The size and need for accessibility to the archives precludes moving them to either Seminary. Options have been explored but none of them have met the needs.

In the future, certain items in the archives will be better preserved and put on display in the Chancery building so that people can have a greater sense of the history and story of the Orthodox Church in America. A further mention must be given to Alexis who has put together an excellent presentation on the 40<sup>th</sup> anniversary of the autocephaly of the OCA. He has given this presentation throughout the country and it has been very well received. This All-American Council will contribute to the archives by hosting a story booth so that we can record the many stories of the OCA, dioceses, parishes and individuals. They will become a permanent part of the historical record of the OCA for future generations. Please participate in this venue.

## ESTATE MANAGEMENT

Another responsibility is the managing of the estate where the Chancery resides. The Chancery building sits on 14 acres with a large building that serves as the Chancery offices, Pension offices and a residence for the Metropolitan. The building was given to the OCA in 1950s for a total cost of \$1. It represents the ONLY property owned by the OCA as an entity. There is no possible way that the OCA could ever acquire anything close to it on today's market. While it does need some cosmetic repairs, the building itself is in structurally sound. Most work that does need to be done is repair and painting.

The offices serve their purpose and there are a few rooms in the top floor available for people to stay.

So what does the building contain since many people have never visited the Chancery? The basement consists of storage rooms and the archives. It also houses one of the servers. The main floor has a wonderful chapel with the relics of many saints. This chapel is the heart of the work at the Chancery and it does have a small community who regularly worship there. There is also a sitting room, two meeting rooms, a solarium, a dining room, kitchen, file and copy rooms. The financial office is housed off the kitchen. The second floor has the Metropolitan's apartment which has a kitchen, dining room, living room, bedroom and office. There are eight offices including a large office of personal files, and another formal sitting room. The top floor contains the offices for the Pension Board, three bedrooms and attic storage space. All together the space is well provided with the exception of a place for large meetings (we utilize a nearby hotel meeting room for free if needed). There are also gardens and pathways which have been restored over the past three years. It is a beautiful setting, under an hour from major airports and a fitting place to meet dignitaries and visitors.

Over the past years, the building was beginning to look rough since there was little money allocated for maintenance due to the ongoing legal suits. However, we have begun restoring the building. The roof and windows are all new from the past 10 years. The exterior had the broken steps replaced this summer and the outside power washed and painted. Broken lights have been replaced and the gutters are cleaned on a regular basis. We do have an *ad hoc* handy man that comes when called to do minor repair work. We also have had some seminarians come out over the past few summers to clean out the attics, basements and garage. The grounds are maintained by an outside contractor who comes once a week. He also does snow removal on call. He has restored much of the grounds back to their original state including the replanting of trees and flowers and the resetting of paths. The inside is maintained by a full-time housekeeper who works many long hours to keep the building looking beautiful. A word about Svetlana, whom we are all very thankful for, is that she works tirelessly in the building. She also works late nights when meetings are going on and maintains so much of the building. We looked into an outside contract and discovered that it would not be cost effective.

The cost for running the facility is comparatively low for the area and comparative size. Excluding the mortgage on the building, automobile, depreciation and the cost of the housekeeper, it runs to around \$11,000 a month which is well below the rental range of comparative buildings for 12,000 square feet of work space. Below is a chart which shows the expenses for the operation of the Chancery building:

	(100 - Unrestricted)		
	Jan - Dec 10	Budget	\$ Over Budget
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
4340 - Direct Public Support	90.00		
<b>Total Income</b>	90.00		

<b>Gross Profit</b>	90.00		
<b>Expense</b>			
6100 · Office expense	350.00		
6210 · Contract Services	158.05		
6270 · Facility Expense	25,171.72	20,841.00	4,330.72
6280 · Facilities and Equipment	48,110.43	34,500.00	13,610.43
6290 · Repairs expense	10,668.30	12,500.00	-1,831.70
6510 · Other Types of Expenses	3,662.00		
6600 · Salaries	45,000.00	45,000.00	0.00
6605 · Payroll Expense	4,480.75	4,107.50	373.25
6610 · Health Insurance	19,321.88	22,517.50	-3,195.62
6640 · Workers Compensation/Disability	787.30		
6680 · Pension expense	2,838.46	2,700.00	138.46
6700 · Utilities	24,330.28	24,675.00	-344.72
6750 · Insurance	27,024.44	32,000.00	-4,975.56
6830 · Travel and Meetings	0.00	400.00	-400.00
6900 · Automobile	11,288.11	13,000.00	-1,711.89
6990 · Depreciation expense	14,539.54		
<b>Total Expense</b>	<u>237,731.26</u>	<u>212,241.00</u>	<u>25,490.26</u>
<b>Net Ordinary Income</b>	<u>-237,641.26</u>	<u>-212,241.00</u>	<u>-25,400.26</u>
	<u><b>-237,641.26</b></u>	<u><b>-212,241.00</b></u>	<u><b>-25,400.26</b></u>

The plans for the future include a repainting of the interior over the next two years, repair work on the attics and an upgrade in the living spaces. The building has had all asbestos removed two summers ago and has been thoroughly inspected for radon, termites and other potential problems. We maintain the septic tank on a regular basis. The property itself is large enough to build on if needed and can have much more utility. But it must be remembered that the Chancery property is an important place for the history of the OCA. It is where the ever-memorable Metropolitan Leonty lived and reposed, where many important events such as reception of autocephaly happened, as well as pivotal events of the Church over the past 50 years. But ultimately, it is the central hub of the Church, where all sorts of gathering occur. As the brochure stated when we first received the property, “But whether we retain it or lose it depends upon all of us. This estate can be a monument to our ability to hold and to enhance, or a monument to our failure to progress. Which shall it be?” We are still asking that question.

## LEGAL AND INSURANCE

One of the requirements of the Secretary is to be the liaison with the Thaddeus Wojcik, General Counsel, and the Legal Committee. There has developed an excellent working relationship and as such many important legal issues have been addressed. These issues can range from questions on Federal Non-Profit status, New York State corporate law to issues of civil or criminal law. All of these require consultation and decisions. The Legal committee has worked through these issues in a very competent and professional manner

and it is an honor working with them. There have been a number of lawsuits through the past years and they have been systematically and competently addressed. There have been a number of in-depth meetings on legal issues in which I have participated. A more in-depth account of the Legal Committee is found in their report. I also have worked closely with Thaddeus on contract issues. All contracts and agreements have been vetted by him and we have developed a good system of review. Other legal issues do come up from time to time which may be beyond my own competence. These are referred to the appropriate parties.

We must remember that part of the Corporate Secretary's duties is to maintain the integrity of Orthodox Church in America as a non-profit corporation. As such, I maintain all of the 501 (C) 3 documents for subordinate entities of the Church. These are updated by myself annually and reviewed by the Internal Revenue Service. One of the major projects over the past two years was to go through each parish's and institution's files and ensure they are in compliance with the IRS. This was a major undertaking because many files were missing information that is required for compliance. I can report that this is complete and all files are in compliance. I receive requests for letters of determination on an almost weekly basis and assist many parishes in ensuring their compliance. I also ensure that the workplace is in full compliance with Federal and New York State Employment law.

Another area of responsibility is to oversee the insurance of the Orthodox Church in America. We are currently insured with Guide One Insurance (and Travelers for some employment issues). I have worked closely with Michael Herzak and Insurance Systems. We complete annual reviews of our insurance needs and adjust as appropriate. We also participate in specific Orthodox programs that ensure proper insurance for over 250 of our participating parishes. Another responsibility is to ensure timely reporting of potential legal issues to the insurance company which will ensure that we are covered in the case of lawsuits. I am happy to report that we have been very successful in this over the past three years and have had no difficulty in coverage. There were some missing gaps in our insurance when I first came on and we have since filled those to ensure a more complete coverage. I also assist parishes on finding a good insurance carrier for their situation and have handled many requests in this regard.

I also sit on the board of the Orthodox Health Plans, a pan-Orthodox group that manages a combined health insurance program. The OCA is the second largest group on the plan. We review the policies and costs each year and make recommendations on adjustments. This ensures that our clergy have access to the best insurance coverage. There have been some questions on the OHP and the rate, but it is an all inclusive, PPO that covers health, dental, pharmaceutical and vision and the rates are competitive. Annual updates are issued to participants. I also assist on a weekly basis clergy and clergy families in finding health insurance. I am able to refer them to different carriers and provide references for them. We have also been looking into providing all clergy of the OCA, life, disability and long term care insurance. There have been a number of meetings looking into this though the methodology is still being worked through. I also manage the Personal

Assistance Program (PAP) which we have with Magellan. This program ensures that all clergy and their families have immediate access to confidential counseling when in need.

## OTHER

There are many areas that do not fall under my job description but nonetheless are worked on by myself and the Chancery staff. There has been much discussion on appeals over the past three years but with the help of the staff we have been able to plan and publish a limited number of appeals. Currently we have the Fellowship of Orthodox Stewards Appeal, the Mission Appeal and the Seminarian Internship Appeal. Some have not been done for various reasons but I would strongly recommend that we revitalize these appeals to assist in the work of the Church. Likewise, I participate in various interfaces with non-OCA groups such as the Episcopal Assembly, IOCC, OCMC, FOCUS NA and others. I am the main Chancery contact for many of the questions or issues that arise in this regard. I also have attended some of their meetings as a representative of the OCA. I often have to work through surveys and other documents that they require.

I am also a main member of the Crisis Management team. This group of professionals has greatly assisted the OCA through some very difficult times. They have provided wise counsel and guidance on a host of issues that were deemed to be critically addressed by the Church. There has been some limited review by the team but we still have a way to go. There are still some outstanding plans for training and development of Crisis Management plans. We hope to move forward in this area in the near future. But for now, we are working on an *ad hoc* basis. Please see their report in another section.

There are additional areas which fall into the realm of public relations. Very often, a member of the Chancery staff will be present at major events both here and abroad. Whether it is at St. Vladimir's Seminary Education Day, the pilgrimage at St. Tikhon's Monastery, a specific event such as the consecration of a bishop or the funeral of a clergyman, the Chancery represents the Church. These travels can take us to many places but it is valuable for people to meet us put a name to a face. While we are often very busy in the daily operations, we try to reasonably get to the major events of the Church.

## CONCLUSION

It was my intention in this report to provide an overview of the multi-faceted work of the Secretary of the Orthodox Church in America. I would like to thank His Beatitude Metropolitan Jonah and the Holy Synod of Bishops for their leadership and patience. I also would like to thank all of the members of the Metropolitan Council and the many departments, boards, commissions and committees with whom I work. They represent a wonderful example of volunteerism in their dedicated work on behalf of the Church. There are many long hours involved and a wide range of responsibility and issues. It may be too much for one position but with a good team and staff, we have been able to work through so many critical operations. As I stated in the introduction, the Chancery work is not just a bureaucratic work but a real pastoral calling. It involves people and

issues that go beyond simple administrative oversight. It requires a real and true connection between the work of the central administration and the dioceses, parishes and the people. Otherwise, it would be empty work. Instead it connects the whole together. I often state that my job is to ensure the administrative unity of the Orthodox Church in America and protect and advance the administrative autocephaly of the Church.

In each of the areas that I have outlined this is accomplished. But it is only accomplished with team work. The officers of the Church work very well together and are in constant communications with each other. I want to draw particular attention to the work of the former Chancellor, Fr Alexander Garklavs, the former Treasurer, Fr Michael Tassos, and the former Director of Ministries and Communications, Fr. Andrew Jarmus. They have been an invaluable resource and source of brotherly friendship over the past three years. Likewise, I would draw attention to the Interim Chancellor, Bishop Melchisedek and the Treasurer Melanie Ringa who have been a wonderful source of inspiration and support. None of the work of the church could be done without their leadership and comradery. We should all greatly appreciate these people in all that they have done for the Church with truth, honor and integrity. They truly represent the best of our beloved Orthodox Church in America.

**Archpriest Eric George Tosi**  
**Secretary**

# ARCHIVES APPENDIX

## ALEXIS LIBEROVSKY

### MANDATE

The Office of History and Archives exists to cultivate the ongoing development of the historical legacy and vision of the Orthodox Church in America as an essential element of the Church's mission. The Office also seeks to foster proper preservation of the historical record of Orthodox Christianity on the North American continent.

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

- Maintains and develops the Archives of the Orthodox Church in America, located at its chancery in Oyster Bay Cove (Syosset), NY, while also collecting and preserving a variety of other materials and resources of historical importance.
- Provides reference and documentary research support to the Holy Synod of Bishops, chancery staff, and other administrative bodies of the Church.
- Offers assistance to dioceses, parishes, and institutions in their historical research on their own communities and to scholars in their academic research on the history of North American Orthodoxy.
- Provides various consultant services to dioceses, parishes and institutions for the development of local archives and appropriate preservation of their own historical records.
- Produces occasional historical publications.
- Reviews, edits or writes material on the OCA and North American Orthodoxy for the massive Orthodox Encyclopedia currently being published in Russia and a variety of other publications.
- The OCA Archivist regularly deliver lectures on historical topics or presentations on archival issues
- Fosters historical knowledge and awareness throughout the Church.

### INITIATIVES AND ONGOING PROJECTS SINCE THE 15<sup>TH</sup> AAC

In addition to the ongoing activities listed above and the daily management of the OCA Archives which primarily involves receiving new material and collections as well as responding to inquiries and assisting onsite researchers, the major outreach initiative during the current triennium was a lecture by the OCA Archivist to mark the 40<sup>th</sup> anniversary of the granting of autocephaly to the Orthodox Church in America. The lecture and accompanying slideshow, titled "The Autocephaly of the Orthodox Church in America and Church Unity: From Historical Vision to the Present," were delivered in some twenty different venues, both OCA parishes and institutions as well as some in other Orthodox jurisdictions, where this presentation was generally well received

Another highlight over the past three years was the OCA Archivist's research, which provided key archival documents as historical background material for the dialogue of the

Commissions of the OCA and the Russian Orthodox Church Outside of Russia (ROCOR) as well as the Archivist's participation in the Commissions' joint meetings and related events.

A report on the OCA Archives in 2009, prepared at the request of the Metropolitan Council, focused on the inadequacy of the current location of the OCA Archives and the deficiencies of the various proposed venues for their relocation. This study concluded that it would be inadvisable to relocate the OCA Archives until a building that conforms to architectural standards for archival facilities can be procured or constructed.

## PROPOSED FUTURE INITIATIVES AND PROJECTS

- As mandated by the Holy Synod in 2003, a professional feasibility study concerning the possible construction of a new facility on the chancery property to house more properly the Archives needs to be conducted once funding for the study is secured.
- With the recent launch of the new OCA website, historical content on the site will be enhanced and expanded. A separate website for the Office of History and Archives may also be created providing greater and more diverse outreach through the internet, both in terms of providing greater access to the OCA Archives, but also offering online resources to assist dioceses, institutions and parishes in the preservation of their own archives.
- To continue and enhance database inventories and finding aids of the collections in the OCA Archives.
- To investigate possibilities of digitization and/or microfilming the collections of the OCA Archives.
- To update the booklet "*A Commemorative List of the Departed Servants of Orthodoxy in North America (Diptychs of the Deceased)*", last published in 2002, publishing it on the OCA website, where it can be constantly updated.
- To explore collaborative efforts in historical and archival work with other Orthodox Churches in order to foster joint projects in historical research for the upbuilding of Orthodox unity and common historical vision, as well as mutually strengthening archival preservation efforts.
- To promote and publicize the OCA Archives to make the rich resources of the OCA Archives more readily available to the entire church and other researchers which, in many cases reinforces missionary and educational outreach through other ministries and witnesses to the Holy Tradition of the Orthodox Church to the non-Orthodox.

## COMMENTS

The Archives of the Orthodox Church in America (OCA) are the official repository for the inactive records of the Central Church Administration, documenting the All-American Councils, the Holy Synod, the Metropolitan Council, dioceses, monasteries,

seminaries, parishes, clergy, departments, boards, commissions, and a variety of other external and internal matters affecting the Church

Additional collections preserved with the OCA Archives include some 90 sets of personal and institutional archives of hierarchs, clergy, lay leaders, and Church-related entities, as well as photographs, films and videos, computer discs, and other media, periodicals, Church directories, and anniversary and historical publications and artifacts from throughout the world.

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

The most pressing need to assure the long-term preservation of the archival collections of the Orthodox Church in America remains a new facility to more properly house these irreplaceable historical treasures. Funding to restore the position of Assistant Archivist to process the continually growing collections of the OCA Archives is also very much needed.

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

The Church cannot adequately fulfill her mission, without a full consciousness of her historical past. This consciousness also provides the faithful and those seeking the truth in Orthodoxy a sense of historical identity. A firm sense of historical identity will enable the vision of the Orthodox Church in America as the local territorial church on this continent to be fully realized. The Office of History and Archives continually seeks to advance such essential historical consciousness throughout the Church

Through the process currently underway of formulating the OCA Strategic Plan and other developments, the OCA is presently in the midst of a revisioning. A major component in this discernment of a vision for the future must be historical reflection and understanding, which has indeed played a role in our recent strategic planning but it must continue to develop at all levels in the Church going forward. A unified historical understanding, which reflects our identity, must be cultivated throughout the OCA. This will not only serve to maintain unity in the Church, but strengthen its vision going forward. The Office of History and Archives will strive to continue developing such historical awareness throughout the Church.

A key approach to authentic historical understanding is through preservation and study of primary source documents and other noteworthy historical material (i.e. archives). Unfortunately, there are many instances throughout the church where archival material is improperly preserved, neglected or even ignored. The Office of History and Archives

will endeavor to enhance its efforts as a resource to assist dioceses, institutions and parishes in their local archival preservation efforts.

The repose of Mary (Masha) Troubetzkoy, retired Assistant Archivist and longtime chancery staff member was mourned at her passing in June 2010. She had succeeded her father, Archivist-Emeritus Serge Troubetzkoy (+2003) upon his final retirement at age 90 in 1997, in significantly assisting the current Archivist in management of the OCA Archives. Their participation in the work of the Office of History and Archives continues to be greatly missed. May their memory be eternal!

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

**Alexis Liberovsky,  
OCA Archivist  
Director – Office of History and Archives**

# COMMUNICATIONS APPENDIX

## GINNY NIEUSWMA

### SUMMARY

Thanks to God's grace and the unflagging, collaborative efforts of each web team member, the team delivered a new site on time and on budget, while also maintaining a high standard for efficiency of posting and responsiveness to requests.

### SITE BUILD: JANUARY 2011-SEPTEMBER 2011

### DESIGN

The designers at Simple Focus were a project manager's dream. From the first day we hired them, they showed up ready to work. They took our goals seriously, and brought clarity and focus to our web project.

It was a daunting challenge. OCA.org hadn't been significantly redesigned since the '90's and it was a complex brew of links and buried resources. We were starting over with everything, from our fonts and colors, to our navigation.

Simple Focus' well-run planning sessions with the web team and the Chancery propelled us forward. John and JD guided us as we framed concrete, achievable web goals for everything touching on design: images, fonts, layout, subsections, landing pages, and mobile accessibility.

### TECHNICAL WORK

Fr. John Schroedel, our developer, and Ryan Platte, our technical manager, poured themselves into the project. Both of them have built or upgraded numerous websites, but they described this project as uniquely challenging.

Ryan Platte, the newly hired Technical Manager, immediately got to work in January. Some of the improvements he made were:

- installing a better system for escrow passwords
- configuring improved access for OCA.org account holders
- setting up a new server
- helping with implementation of the new content management system and the new design
- running security updates
- installing a helpdesk ticket system
- creating Google Analytics for a continual stream of nuanced, accurate site feedback

In the meantime, Fr. John built the site from the ground up in the new content management system, Expression Engine. As of mid-September, he had recorded 455 development hours of work. Fr. John is nearly finished, and he will be submitting his last invoice by the end of September. Fortunately, he offered the OCA a fixed bid and so he will be completing his work within budget. His willingness to do this project at a steep discount saved the OCA a significant amount of money (he could have easily doubled his fee for a secular client on a project of this size). We owe him a debt of gratitude.

## CONTENT

OCA.org is wide and deep—wide, in that it's a site that aims to serve clergy, the faithful, but also inquirers to Orthodoxy, including those of no church background whatsoever. It's deep, in that there's a tremendous amount of content that must be posted and maintained in such a way as to be accessible to our educated and opinionated group of users.

The questions kept multiplying as I labored over how to improve the site's architecture and functionality. How should we handle the directories? How do we improve our photo galleries and media delivery? How do we arrange the archival material? What do we do with legacy material? How do we organize the departments, boards and commissions? Is our Feasts & Saints section accurate enough or thorough enough, and how do we display Scripture Readings? Underneath it all was this driving question: how do we structure all this content so that people can get in and out of OCA.org with minimal frustration?

We're pretty pleased with the amount of positive feedback we've received. Some people have taken awhile to get used to the new structure; one or two folks told us we should have left the site alone. But an overwhelming majority of people are happy with the new site, and more so as time goes on and they adjust to the changes.

## FEEDBACK

*What a great way to start the day--going on the OCA site and seeing a new, beautiful, easy to navigate page. Thanks for your hard work--very much worth it. I picture a "seeker" looking for info about Orthodoxy coming on the site and finding abundant content that's attractive and informative. -Valerie Zahirsky*

*The new [oca.org](http://oca.org) site looks great! Wonderful work. Kudos to you and the web team. – Fr. Sergius Halvorsen*

*I was really impressed with the website as I surfed through. Today, I went to it on my iPhone and it's like I have all the resources for daily prayers, instruction; saints in a hand held device. It's like the team intentionally took it to another level. -Joel Williams*

*I've been happily exploring the new OCA website, and am delighted with its appearance and usefulness. You get an A++! Congratulations to you and your team in making this happen. – Dr. Dmitri Solodow*

*FELICITATIONS ON THE "NEW LOOK" OF THE WEBSITE! THE EXPANDED COVERAGE OF ALL THE SAINTS OF THE DAY, ETC. JUST GREAT. I look at the site every morning. -Mel DeFotis*

*I would like to congratulate you and all those who contributed to the redesign of [oca.org](http://oca.org). It has a much improved format and appearance. -Fr. Juvenaly, Kodiak, AK*

*What a beautiful new look to the [OCA.org](http://OCA.org) site! -Elizabeth Berg*

*Looks good. Congratulations! A job well done. It is "cleaner". +Bishop Benjamin*

*Your months and months of late nights, conference calls, hours of mind-numbing coding, all the back-end technology, something which is a mystery to most of us, have provided the OCA with a site befitting our mission here in America, and I dare say, a site of which we can all be very proud. +Metropolitan Jonah*

*Congratulations on a superb job! I have been making my way around the new website today, and it is remarkable. You are to be commended for your dedication to this project, to this "ministry". I only know some of the many challenges you faced, but realize that this was a labor of great love for the Church. -Melanie Ringa*

*Please convey to all who contributed to the new website for our OCA, a job very well done! Thank you! -Dn. John Zarras*

*The newly designed OCA website looks amazing by the way! -Cindy Davis*

## ONGOING MAINTENANCE IN 2011

Due to the efforts of Fr. John Matusiak and Jessica Linke at the Chancery, the ongoing site work continued unabated, despite the dust and chaos of the construction phase:

- We replied to, and solved, 30+ help desk tickets each week
- In an average week, Fr. John wrote between 10-15 News posts
- Ginny, Fr. John and Jessica posted new features 3-5 times a week (podcasts, photo galleries, conferences, interviews, new books)
- Turnaround time for post requests or site edits was typically under an hour
- At least 5 people actively worked on the site at any given time
- We used 3 different virtual tools to keep up with site work: Basecamp, Assistly and Pivotal Tracker
- FJM answered each personal question within 24 hours
- Liturgical resources continued to be a highly trafficked and useful section, thanks to the work of David Drillock and Jessica Linke, who was continually updating music and texts
- Fr. Joseph Frawley began an update of the Feasts & Saints section
- Protodeacon Joseph Matusiak created photo galleries

## 2012 OBJECTIVES

We now have the ability to build on the work that's been done this year; our goal is to expand OCA.org's ministry while also continuing to upgrade the site technically.

### *EDITORIAL LIST*

- find and post more material introducing the Faith; photo essays of key liturgical services such as vespers and liturgy, apologetics articles
- begin lay and clergy OCA.org focus group for targeted feedback
- add OCA calendar to site
- add more Q & A interviews and profiles of OCA people
- add to Reflections in Christ
- improve access to Wonder material, build YYA relationship
- refine and add to Liturgical Resources
- develop saints and resources in Spanish
- (Simple Focus) refine home page to allow for less scrolling
- feature parishes in landing page sidebars
- help people understand: what does Chancery support? Post stories from the departments, mission parishes, the archives, Greg's work with directories
- solicit content--photographs, reflections & good homilies, reports about outreach or youth projects
- work with Fr. Joseph Frawley to add saints

### *TECHNICAL LIST*

- convert Contact page to a web form feeding to our ticket system
- Twitter/support ticket integration design
- implement more of the SF design
- performance: CDN implementation page- and fragment-caching, tune queries, install Varnish
- Systems improvements: retire old servers, set up system monitoring, tighten security, create downtime response plan
- SEO / obey Google Webmaster Tools tips
- drive more stuff in EE admin vs depending on HTML views
- audio & video integration improved
- fill out all the Google Maps implementation and dress it up
- support data review
- clusterize to make Find a Parish one big awesome gmap
- set up offsite backup to Strongspace
- enable donation online
- documentation: create tech manual
- work out a photo catalog solution
- set up Git tracking and buy OCA license for Geotagger to replace Inoa's

# JOB DESCRIPTION OF THE TREASURER

## SUPERVISORY AND JOB CONTROLS

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

## JOB SUMMARY

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

## MAJOR DUTIES

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

- evaluates performance of investments and, as appropriate, reallocates assets. Ensures that all fund raising is within the context of Christian stewardship practices, Best practices and policies of the OCA, including the Donor Bill of Rights.
3. Performs a variety of on-going financial activities typified by the following:
    - Submitting financial status reports to the Holy Synod of Bishops, Metropolitan Council, and general membership.
    - Developing and maintaining primary banking relationships, cash management systems, and credit arrangements.
    - Insuring financial transparency and providing for regular independent audits.
  4. Supports and/or guides and directs the work of the Office of Development and Stewardship. Assists in development of goals and objectives, oversees progress against goals, provides direction when necessary, assures appropriate coordination, and resolves problems that transcend individual organizations' scopes.
  5. Provides reports and other information to the Metropolitan Council's Audit and Investment Committees, as required or requested. . Ensures full cooperation with the OCA's internal and external auditors. Works closely with the Finance Committee for effective and complete reporting to the Metropolitan Council.
  6. Serves as a voting member of the Metropolitan Council.
  7. Supervises a small staff engaged in financial support activities. Sets goals, assigns work, reviews progress, and evaluates performance.

## JOB REQUIREMENTS

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

# REPORT OF THE TREASURER

## MELANIE RINGA

Thank you for the opportunity to address the 16<sup>th</sup> All-American Council and to present this report. As I contemplated how to proceed with informing you of the progress made since we last met in 2008, and to highlight the challenges our Church is facing at this point in time, I studied the information presented by Father Michael Tassos in his report in 2008. It seemed logical to carry forward and update the many financial analyses in his report, and then address our challenges at this time.

My report will cover three main areas:

1. An overview of where we were financially in 2008 and the events that have transpired from 2008 through 2010.
2. A brief recap of 2011 financial results to date versus the budget.
3. Where do we go from here? We are at a Crossroad and the choices take us in very different directions.

## AN OVERVIEW OF OUR FINANCES FROM 2008 THROUGH 2011

### CONDENSED BALANCE SHEETS UPDATED THROUGH JUNE 2011

The following page contains Condensed Balance Sheets for the years 2005 through June 30, 2011. The information for 2005 was prepared by Lambrides, Lamos & Taylor, LLP. The information for the years 2006 through 2010 was taken from the audited financial statements, and the information for the six months ended June 30, 2011 was taken from our internal financial reporting system.

Condensed Balance Sheet

	2005	2006	2007	2008	2009	2010	6/30/2011
<b>ASSETS</b>							
Cash	\$ 95,289	\$ 680,637	\$ 679,697	\$ 430,904	\$ 360,761	\$ 464,805	\$ 864,481
Accounts and Notes Receivable	\$ 59,306	\$ 95,056	\$ 308,644	\$ 88,476	\$ 117,501	\$ 150,051	\$ 104,219
Prepaid and Inventory	\$ 40,668	\$ 113,187	\$ 28,877	\$ 23,708	\$ 6,677	\$ 13,017	\$ 10,054
Investments	\$ 2,741,333	\$ 2,941,212	\$ 2,784,831	\$ 1,640,669	\$ 1,446,382	\$ 1,378,305	\$ 1,211,233
Land, building and equipment	\$ 880,458	\$ 761,615	\$ 416,638	\$ 396,942	\$ 344,491	\$ 319,387	\$ 303,582
<b>Total Assets</b>	<b>\$ 3,817,054</b>	<b>\$ 4,591,707</b>	<b>\$ 4,218,687</b>	<b>\$ 2,580,699</b>	<b>\$ 2,275,812</b>	<b>\$ 2,325,565</b>	<b>\$ 2,493,569</b>
<b>LIABILITIES</b>							
Accounts payable and accrued exp	\$ 490,587	\$ 207,452	\$ 218,019	\$ 193,360	\$ 355,380	\$ 96,221	\$ 60,066
Loans Payable	\$ 917,525	\$ 1,727,026	\$ 1,096,892	\$ 1,015,761	\$ 912,168	\$ 789,373	\$ 734,568
Deferred Compensation	\$ 188,300	\$ 151,863	\$ 66,158	\$ -	\$ -	\$ -	\$ -
Annuity & unitrust agreements	\$ 478,507	\$ 521,213	\$ 830,579	\$ 624,254	\$ 537,758	\$ 456,329	\$ 398,542
<b>Total Liabilities</b>	<b>\$ 2,074,919</b>	<b>\$ 2,607,554</b>	<b>\$ 2,211,648</b>	<b>\$ 1,833,375</b>	<b>\$ 1,805,306</b>	<b>\$ 1,341,923</b>	<b>\$ 1,193,176</b>
<b>NET ASSETS</b>	<b>\$ 1,742,135</b>	<b>\$ 1,984,153</b>	<b>\$ 2,007,039</b>	<b>\$ 747,324</b>	<b>\$ 470,506</b>	<b>\$ 983,642</b>	<b>\$ 1,300,393</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 3,817,054</b>	<b>\$ 4,591,707</b>	<b>\$ 4,218,687</b>	<b>\$ 2,580,699</b>	<b>\$ 2,275,812</b>	<b>\$ 2,325,565</b>	<b>\$ 2,493,569</b>

To recap from Father Tassos' 2008 Treasurer's Report:

*“This particular financial statement speaks volumes about the financial condition of the church from 2005 until the present. By the year 2005 the church had basically run out of money. Please look at the line that says “Accounts payable and accrued expenses.” In 2005 the basic payables were \$490,587 and the cash in the bank was only \$95,289. In addition to being out of money, it was discovered that restricted funds were being used to cover basic operating expenses. In 2006 the OCA took out a loan with Honesdale National bank in the amount of \$1,700,000....” “What can we glean from all this? It is safe to say that prior to 2006, the Orthodox Church in America was in terrible financial shape. It was grossly behind in paying its bills, the books were frankly unauditible, and the Central Administration was taking money from Restricted Funds to pay for general operating expenses.”*

The positive changes that took place in the OCA in 2006-2007, which included the reorganization of the chancery, implementation of Best Practices, and the hiring of qualified personnel proved a success, as the OCA actually experienced a small surplus in 2007.

However, in looking at the balance sheets 2008 and 2009, we see that the financial condition took a dramatic downturn, with our NET ASSETS dropping from just over \$2 million in 2007 to \$747,324 at the end of 2008 and to \$470,506 by the end of 2009. The surplus that we experienced in 2010 brought us back to \$983,642, but this is far below where we were at the end of 2007. In order to see the reasons for the decrease in Net Assets, we must look at the Statement of Activities (Income Statement) for the last three years.

## CONDENSED STATEMENT OF ACTIVITIES THROUGH JUNE 2011

To better understand what has happened over the past few years to cause this precipitous decline in Net Assets, I have included a condensed Statement of Activities. For the years 2006 the figures were those completed by Lamos, Lambrides, Moulthorp, LLC. The figures for 2007 are audited figures from Weiser, LLP. The 2008, 2009 and 2010 numbers are audited numbers by Lambrides, Lamos, Taylor LLP., and the six-month 2011 were those compiled by me. In the report below all of the Unrestricted, Temporarily Restricted and Permanently Restricted net assets have been combined into one column.

- Diocesan assessments have actually *declined* from 2006 to 2011 (\$2.673 million in 2006 vs. \$2.4 million in 2010, and projected \$2.3 million in 2011),
- Fellowship of Orthodox Steward contributions have gone from \$142,672 in 2006 to \$135,704 in 2009 and only \$7,971 was received through the first six months of 2011,

- The sum of Charities, Ministries, Seminaries, Theological Education and General Contributions has gone from \$344,895 in 2006 to \$306,063 in 2007 to \$100,298 in 2010 and only \$9,399 through the first six months of 2011.
- Total annual revenues have fallen from \$3.295 million in 2006 to \$2.573 million in 2010.
- The financial collapse in the stock markets in 2008 resulted in losses in our endowed investments of almost \$700,000.

While the revenues were decreasing, *variable expenses* were increasing. Our Professional Fees, which had been at \$410,980 in 2006 and \$287,266 in 2007 increased dramatically to \$556,260 in 2008 and to \$860,566 in 2009 (this figure includes the accrual of \$250K for the Legal Settlement paid in May 2010). These expenses represent the cost to defend the various lawsuits, to resume annual external audits and work toward an “unqualified opinion”, and the cost of additional accounting help, which ended in 2010. **In fact, over the five year period from 2006 through 2010, our TOTAL legal, audit, accounting and other consulting fees was a staggering \$2,375,695.** As Father Tassos reported in 2008, *“The Orthodox Church in America’s current funding mechanism is based upon diocesan assessments and a budget. There is no other well of money to tap into.”* So, where did the funds come from to pay these fees?

- General Administration expenses (other than Legal, Accounting and Other Professional Fees) were reduced from \$2,459,911 in 2006 to \$1,662,908 in 2010 (a 32% decline), and
- Program and Ministry funding was cut from its high of \$668,509 in 2008 to \$131,472 in 2010. In 2009 the Metropolitan Council was forced to make the decision to fund ministries from FOS appeal revenues only.
- For the first half of 2011, while we report a surplus of \$ 389,550, please note that of this \$389,550, \$219,651 represents AAC assessments invoiced but not yet expended, and \$110,412 represents a bequest to the Youth Ministry Department. These funds total \$330,063 and are “temporarily restricted” funds. The operating surplus for the period is \$51,148.

**Condensed Statement of Activities**

	2006	2007	2008	2009	2010	6/30/2011
<b>INCOME</b>						
Diocesan Assessments	\$ 2,673,712	\$ 2,630,054	\$ 2,538,076	\$ 2,453,710	\$ 2,404,989	\$ 1,153,605
All-American Council	\$ -	\$ 476	\$ 243,171	\$ -	\$ -	\$ 219,651
Publications	\$ 72,807	\$ 41,401	\$ 36,152	\$ 12,053	\$ 7,704	\$ 1,087
FOS	\$ 142,672	\$ 127,625	\$ 23,221	\$ 135,704	\$ 44,453	\$ 7,971
St Catherine's Church	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charity	\$ 133,562	\$ 77,447	\$ 44,044	\$ 10,567	\$ 3,592	\$ 1,887
Missions	\$ 76,505	\$ 108,086	\$ 50,703	\$ 38,975	\$ 59,198	\$ 3,303
Seminary	\$ 48,437	\$ 53,525	\$ 53,101	\$ 2,239	\$ 4,708	\$ 1,689
General Contributions	\$ 50,116	\$ 61,404	\$ 40,473	\$ 45,815	\$ 32,800	\$ 2,520
Theological Education	\$ 36,365	\$ 28,372	\$ 6,050	\$ 560	\$ -	\$ -
Yearbook & Calendar	\$ 1,573	\$ 2,750	\$ 1,191	\$ -	\$ -	\$ -
Youth Ministry	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 110,412
North America Saints Projec	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,000
Misc Other	\$ 59,568	\$ 7,144	\$ 63,032	\$ 31,354	\$ 15,484	\$ 10,605
Gain on sale of Residence	\$ -	\$ 158,699	\$ -	\$ -	\$ -	\$ -
<b>Total Income</b>	<b>\$ 3,295,317</b>	<b>\$ 3,296,983</b>	<b>\$ 3,099,214</b>	<b>\$ 2,730,977</b>	<b>\$ 2,572,928</b>	<b>\$ 1,522,730</b>
<b>EXPENSES</b>						
Programs & Ministries	\$ 589,071	\$ 541,480	\$ 668,509	\$ 246,885	\$ 131,472	\$ 69,416
General Administration	\$ 2,459,911	\$ 2,215,138	\$ 2,223,011	\$ 1,893,918	\$ 1,662,908	\$ 913,601
Professional Fees**	\$ 410,980	\$ 287,266	\$ 556,260	\$ 860,566	\$ 260,623	\$ 144,179
All-American Council	\$ -	\$ -	\$ 243,647	\$ -	\$ 13,843	\$ 16,345
<b>Total Expenses</b>	<b>\$ 3,459,962</b>	<b>\$ 3,043,884</b>	<b>\$ 3,691,427</b>	<b>\$ 3,001,369</b>	<b>\$ 2,068,846</b>	<b>\$ 1,143,541</b>
<b>Changes in Net Assets</b>						
<b>From Operations**</b>	<b>\$ (164,645)</b>	<b>\$ 253,099</b>	<b>\$ (592,213)</b>	<b>\$ (270,392)</b>	<b>\$ 504,082</b>	<b>\$ 379,189</b>
<b>Other Changes</b>						
Interest and Dividend Incon	\$ 181,764	\$ 39,697	\$ 45,085	\$ 10,278	\$ 8,524	\$ 4,176
Realized & unrealized gains	\$ 43,824	\$ 102,924	\$ (690,304)	\$ (16,704)	\$ 531	\$ 6,185
Distributions	\$ -	\$ (16,344)	\$ (22,283)	\$ -	\$ -	\$ -
<b>Total Other Changes</b>	<b>\$ 225,588</b>	<b>\$ 126,277</b>	<b>\$ (667,502)</b>	<b>\$ (6,426)</b>	<b>\$ 9,055</b>	<b>\$ 10,361</b>
Change in Net Assets	\$ 60,943	\$ 379,376	\$ (1,259,715)	\$ (276,818)	\$ 513,137	\$ 389,550
Audit Adjustments	\$ -	\$ (356,531)	\$ -	\$ -	\$ -	\$ -
Beginning Net Assets	\$ 1,923,210	\$ 1,984,153	\$ 2,007,038	\$ 747,323	\$ 470,505	\$ 983,642
<b>Ending Net Assets</b>	<b>\$ 1,984,153</b>	<b>\$ 2,006,998</b>	<b>\$ 747,323</b>	<b>\$ 470,505</b>	<b>\$ 983,642</b>	<b>\$ 1,373,192</b>
<b>**Professional Fees</b>						
Legal Fees	\$ 311,665	\$ 100,225	\$ 220,017	\$ 453,627	\$ 141,436	\$ 51,248
Legal Settlement	\$ -	\$ -	\$ -	\$ 250,000	\$ -	\$ -
Audit Fees	\$ 36,877	\$ 80,058	\$ 116,504	\$ 59,785	\$ 49,500	\$ 37,420
Professional Fees - Other	\$ 62,438	\$ 106,983	\$ 219,739	\$ 97,154	\$ 69,687	\$ 55,511
(in all years except 2011 thi represents additional acctg and special audits)	\$ 410,980	\$ 287,266	\$ 556,260	\$ 860,566	\$ 260,623	\$ 144,179

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

### Condensed Statement of Cash Flows

	<u>2008</u>	<u>2009</u>	<u>2010</u>
Change in net assets	\$(1,259,715)	\$276,818	\$513,136
Adjustments to reconcile change in net assets to net cash used by operating activities:	(889,762)	(215,923)	(303,226)
Net cash provided/(used) by operating activities	(369,953)	(60,895)	209,910
Net cash from/(used by) investing activities	233,610	94,345	2,619
Net cash provided by/(used by) financing activities	(112,450)	(103,593)	(103,247)
Net increase/(decrease) in cash	(278,793)	(70,143)	104,044
 Cash and cash equivalents, beginning	 679,697	 430,904	 360,761
 Cash and cash equivalents, ending	 430,904	 360,761	 464,805
Unrestricted			
Cash.....	\$161,377	\$87,703	\$89,620

**This completes the update of financial activities over the last three years since our meeting in Pittsburgh.**

### BRIEF RECAP OF 2011 RESULTS VERSUS BUDGET

The operating budget for 2011 was prepared under the following assumptions:

- The core structure of the Central Administration would be the same as 2010.
- Since the major lawsuits had been resolved in 2010, the budget for Legal Fees would be considerably less than prior years.
- We had made good progress on resolving the two accounting issues that had led to “qualified” audit opinions and higher audit and accounting fees, and these fees would be lower in 2011.
- Since our Net Assets (in other words, the net worth of the OCA), had been decimated by the losses in 2008 and 2009, it would be prudent to budget a small surplus which could be utilized for future needs.
- It was time to start funding the programs and ministries from Operating Funds, not relying only on the FOS Appeal for Departmental ministries funding and on the Charity and Mission Appeals for funding to those programs.
- It would be prudent to start setting aside reserves for future requirements in the Legal, Deferred Maintenance and Auto Replacement areas.

Therefore, our 2011 budget, as amended at the Metropolitan Council meeting held in May, 2011, anticipated an Operating Surplus of \$57,260. Included in the **Operating** budget were the following:

- Funding for Charities in the amount of \$10,000;

- Funding for Church Planting Grants in the amount of \$35,000
- Funding of a Deferred Maintenance Reserve in the amount of \$10,000
- Funding of a Legal Reserve in the amount of \$15,000
- Funding of an Auto Replacement Reserve of \$5,000
- Funding for Departmental Ministries in the amount of \$113,750, regardless of the FOS Appeal monies received.

**GRAND TOTAL OF ABOVE = \$ 188,750**

Our actual results through June show an Operating Surplus of \$51,148. Our operating revenues are under budget by \$25,141, all in assessments. Our operating expenses are under budget overall, however there are several areas in which we are over budget:

- Administration is over budget by \$25,555, due to legal fees being higher than anticipated (\$14,467), and Audit fees (\$19,920). The audit fees is a budget timing issue and will even out over the balance of 2011.
- Metropolitan's Office is over budget by \$7,754. This is travel related, as the airline tickets for the August trip to the Czech Lands had been purchased in June.
- Holy Synod expenses are over budget by \$12,373, again all in the travel area. The budget did not anticipate the Episcopal Assembly meetings. This variance should decrease by the end of the year.

**FOS** – FOS revenues through June 30<sup>th</sup> were \$7,971 versus a budget of \$25,000. There has been no official FOS Appeal as yet in 2011. Departmental ministry expenses were \$35,786 versus a budget of \$56,875. The departmental expenses are expected to increase during the second half of the year as we prepare for a Missions Appeal in the fall.

Once again, while the total surplus as of June 30, 2011 is \$389,550, \$270,696 of this surplus is in the Temporarily Restricted funds due to the AAC Assessments and the Youth Ministry Bequest.

## WHERE DO WE GO FROM HERE?

These are the significant challenges listed by Father Tassos in his report in 2008:

1. Accounting matters,
2. Legal matters,
3. Timely and accurate financial reporting
4. Implement the Blackbaud accounting software
5. Resurrect the Fellowship of Orthodox Stewards
6. Develop and implement a budget for the next triennium
7. Move the current investment portfolio and develop an investment strategy that is reasonable

8. Examination and reconstruction of the permanently restricted net assets.

I believe we can say that #'s 1, 2, 3, 4 and 8 have been successfully completed. Following is the current status of the other 3 challenges:

**5. *Fellowship of Orthodox Stewards:*** We have not yet revived our FOS program, which is evident from the Statements of Activities presented above. I am hopeful that the budgets for the next triennium will include Development Staffing for this and other appeals.

**6. *Budget for the next triennium:*** At the meeting of the Metropolitan Council in March 2010, an Ad Hoc Subcommittee of the Finance Committee was formed. The purpose of this committee was to meet with the Bishops and other key personnel from each diocese to discuss methods of funding the church. The Ad Hoc committee met with representatives of four of the dioceses, and while each diocese expressed discontent with the current "fair share" method, each acknowledged two important points: (1) there are vast differences from diocese to diocese as to a readiness to move from the current method to some type of proportional giving or tithing system; and (2) the funding level of the national church should remain at the current level for the next triennium as we work towards educating our parishioners and moving towards a new funding mechanism. Therefore, at the May 2011 Metropolitan Council meeting, the instruction given for preparation of the 2012 budget was to use the current funding level of \$2.3 million annually. However, shortly after that meeting, a Resolution was submitted to the AAC Resolutions Committee, calling for a reduction in the assessment to \$50 per adult.

**Therefore, we find ourselves at a Crossroad. The paths are 180 degrees apart and the roads lead to very different outcomes.**

At the Holy Synod and Metropolitan Council meetings in September 2011 I will be presenting two budget scenarios. Budget #1 will be at the current assessment level of \$2.3 million annually. This budget will continue to build on the progress we have made over the last five years, starting with the Reorganization Task Force, adoption of Best Practices, staffing of the Chancery with qualified personnel, a Metropolitan Council comprised of truly dedicated, intelligent, faithful representatives who give generously of their time and talent not only in their preparation for and attendance at meetings, but almost on a daily basis with the work they do on the various committees on which they serve. One cannot even begin to calculate the value of all the time and expertise donated by these individuals. Budget #1 sustains the current operation of the chancery in Syosset, continuing to hold fixed expenses steady and to cut variable expenses wherever possible. At the same time this budget looks to increase the funding to the Departmental Ministries from the \$113,750 in the 2011 budget to \$200,000 for 2012. The dedicated Department chairs, along with their assistants, have kept the various ministries going despite the lack of funds over the last three years. They continued to do their "jobs" with no remuneration for two years, as they chose to use the little funding that was available for program expenses. In 2011 we were able to reinstate very modest stipends for the

department chairs and to provide small increases in the funding for programs. The 2012 plan calls for increased funding to these important ministries. The 2012 budget also includes adding to the various reserves begun in 2011, as discussed in Part Two above.

The second budget being presented, Budget #2, at \$50 per dues paying member, translates into \$1.1 million annually based on our current census of 22,000 members. This represents a 53% reduction from our current operating level, and this decline cannot be achieved by simply reducing or eliminating frivolous expenses. This drastic a cut would **necessarily result** in not just a decrease in the functions performed by the central administration, but the elimination of personnel and ability to function and to fulfill our duties. Without a plan as to how these tasks will be accomplished, or by whom, what would the result be for the Church, the Dioceses, the parishes and the faithful? These are questions that need to be addressed **PRIOR** to determining the level of assessment required.

The Strategic Planning Committee has been leading a process for the last two and one half years, with the goal of defining “Who Are We?”, “Where Are We Going?”, and “How Do We Get There?” The answers to these questions, which will hopefully be revealed by the end of this Council, should determine the direction we take in terms of funding the church. The work of funding the church, from the parish level up through the dioceses and to whatever structure is determined necessary at the national level, **must be the work of ALL the faithful**, with dialogue and cooperation on all levels.

As representatives to the All-American Council, you are charged with setting the assessment level for the next triennium. The Holy Synod and the Metropolitan Council will establish and approve a budget based upon the assessment amount. As Treasurer for the Orthodox Church in America, and a member of the Ad Hoc Finance Subcommittee, it is my recommendation that the plan proposed by the Ad Hoc Subcommittee be adopted, freezing the current level of assessments for the next triennium, as we receive the results of the Strategic Planning Committee, analyze those results and work toward revising the funding methodology in conjunction with the dioceses.

**7. Movement of the current investment portfolio and development of an actual investment strategy:** In 2006 the investment portfolios for the annuities were moved to Wachovia Securities, now Wells Fargo Advisors. The endowment portfolios were moved to Honesdale National Bank in 2008. We are currently in the stages of evaluating the performance of these investment advisors, developing an “Investment Policy” for our endowment and annuity accounts, and defining a “Spending Policy” for the revenues realized. We anticipate that this will be completed by the end of this fiscal year.

**Update on the Reconstruction of the Permanently Restricted Net Assets:** In 2008, Father Michael Tassos included a list of the Permanently Restricted Net Assets according to the records of The Very Reverend Archpriest Stavros Strikis as of June 30, 2007. Over the past two years extensive work has been performed on these funds, and audited by Lambrides, Lamos, Taylor LLP. The following page is an updated list of these funds, with their balances as of December 31, 2010.

**Fund Balances (Cost Value) as of December 31, 2010**

	<b>Fund</b>	<b>Donated</b>	
<b>A. Endowment Funds (Unrestricted Earnings)</b>	<b>Balance</b>	<b>Principal</b>	<b>(+/-)</b>
Joseph P Chwan	\$ 8,709.13	\$ 5,695.58	\$ 3,013.55
Suzanne Hubiak	\$ 4,120.86	\$ 3,054.00	\$ 1,066.86
John Tarkov	\$ 8,369.10	\$ 5,000.00	\$ 3,369.10
William Macko	\$ 24,182.80	\$ 15,000.00	\$ 9,182.80
Olga Stammer	\$ 1,553.53	\$ 1,000.00	\$ 553.53
Anonymous (Ralich)	\$ 776.58	\$ 500.00	\$ 276.58
Paul Fekula	\$ 1,589.29	\$ 1,000.00	\$ 589.29
Bilous	\$ 93,318.56	\$ 63,205.55	\$ 30,113.01
Vladimir Sakovich	\$ 3,005.42	\$ 2,000.00	\$ 1,005.42
Efthia Colman	\$ 1,493.53	\$ 1,000.00	\$ 493.53
Rozalia Kiselica	\$ 1,493.53	\$ 1,000.00	\$ 493.53
Fr Thomas HD Brown	\$ 14,173.96	\$ 10,020.00	\$ 4,153.96
Evdokiya Ivanova Bruhanova	\$ 81,800.35	\$ 63,030.36	\$ 18,769.99
James Karabin	\$ 13,719.80	\$ 10,000.00	\$ 3,719.80
Greg & Mary S tefanick	\$ 33,217.63	\$ 28,256.43	\$ 4,961.20
Tkacz Memorial	\$ 15,074.27	\$ 13,860.00	\$ 1,214.27
Antonia Rotko	\$ 100,227.01	\$ 132,206.16	\$ (31,979.15)
Lydia Kavalenko	\$ 23,401.47	\$ 9,164.99	\$ 14,236.48
York	\$ (0.00)	\$ 82,475.51	\$ (82,475.51)
FOS Endowment	<u>\$ 67,731.04</u>	<u>\$ 107,245.55</u>	<u>\$ (39,514.51)</u>
<b>Subtotal</b>	\$ 497,957.85	\$ 554,714.13	\$ (56,756.28)
<b>B. Endowment Funds (Restricted Earnings)</b>			
Theodore Dran	\$ 22,492.34	\$ 25,000.00	\$ (2,507.66)
Frank Dellerman	\$ 3,188.85	\$ 1,100.00	\$ 2,088.85
Anonymous Fund (Rex)	\$ 7,030.89	\$ 5,000.00	\$ 2,030.89
S t. Andrew Fund	\$ 100,744.75	\$ 150,000.00	\$ (49,255.25)
Alex & Sarah Kharitonoff	\$ 38,558.13	\$ 21,621.38	\$ 16,936.75
Anonymous Fund (Ralich)	\$ 1,458.88	\$ 500.00	\$ 958.88
Irene Repaske	\$ 2,114.36	\$ 2,000.00	\$ 114.36
Zerr Memorial	\$ 11,638.12	\$ 15,000.00	\$ (3,361.88)
Stephen & Anna Kudrick Fund	\$ 16,746.11	\$ 18,142.99	\$ (1,396.88)
Miscellaneous Missions	\$ 1,736.40	\$ 1,830.00	\$ (93.60)
Joseph & Anna Fekula	\$ 9,832.43	\$ 5,688.43	\$ 4,144.00
S t. Michael Fund	\$ 28,601.07	\$ 13,931.00	\$ 14,670.07
Chupinsky	\$ 19,978.11	\$ 23,919.76	\$ (3,941.65)
Fr John S kvir Fund	\$ 31,357.38	\$ 29,828.04	\$ 1,529.34
Met. Theodosius S chp. Fund	\$ 38,118.65	\$ 19,461.62	\$ 18,657.03
Pavel Savich	\$ 141,680.80	\$ 70,444.06	\$ 71,236.74
Helen Holowasko	\$ (32,092.90)	\$ 1,479.20	\$ (33,572.10)
Greg & Mary S tefanick Fund	\$ 75,571.44	\$ 56,512.50	\$ 19,058.94
Suzanne & Sylvia Liebenthal	\$ 5,761.34	\$ 7,300.00	\$ (1,538.66)
John & Anna Livosky Fund	\$ 39,211.37	\$ 38,317.94	\$ 893.43
Andrew and Blanche York	\$ 0.00	\$ 329,902.02	\$ (329,902.02)
Due from operating	\$ (250,000.00)	\$ -	\$ (250,000.00)
Due from 9/11 Funds	\$ (151,500.00)	\$ -	\$ (151,500.00)
John and Mary Chupinsky Fund	\$ 19,961.99	\$ 23,919.76	\$ (3,957.77)
Stephen & Mildred Karas Fund	\$ 18,274.09	\$ 16,798.20	\$ 1,475.89
Youth Ministries Publications Fund	<u>\$ 58,512.41</u>	<u>\$ 43,361.25</u>	<u>\$ 15,151.16</u>
<b>Subtotal</b>	\$ 258,977.00	\$ 921,058.15	\$ (662,081.15)
<b>C. Unrestricted Designated Fund</b>			
Custody Legacy Funds	<u>\$ 239,152.76</u>	<u>\$ 233,265.60</u>	<u>\$ 5,887.16</u>
<b>D. Life Income Funds</b>			
John I McGuire Archives Fund	<u>\$ 152,277.87</u>	<u>\$ 163,334.73</u>	<u>\$ (11,056.86)</u>
<b>Total Endowments</b>	<u>\$ 1,148,365.48</u>	<u>\$ 1,872,372.61</u>	<u>\$ (724,007.13)</u>

## CONCLUSION

It has been a tremendous honor to serve as the Treasurer of the OCA for the past two years. I would like to thank my brothers and sisters in Christ at the Chancery for their tremendous hard work, dedication and love. It has been quite a journey and while we have accomplished many of our goals there is still much work to be done.

**Melanie Ringa**  
Treasurer

# JOB DESCRIPTION OF THE DIRECTOR OF EXTERNAL AFFAIRS and Interchurch Relations

## SUPERVISORY AND JOB CONTROLS

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

## JOB SUMMARY

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

## MAJOR DUTIES

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

Performs Other Duties as Assigned

## JOB REQUIREMENTS

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

# REPORT OF THE DIRECTOR OF EXTERNAL AFFAIRS AND INTERCHURCH RELATIONS ARCHPRIEST LEONID KISHKOVSKY

## RELATIONS WITH THE ORTHODOX CHURCHES

The Orthodox Church in America's mission is to witness to the Gospel of Christ and the Orthodox faith in North America and its vocation is to build up the Body of Christ as a united local Orthodox Church. This mission and this vocation include the responsibility to strengthen communion among Orthodox Churches, in North America and around the world.

To this end, His Beatitude Metropolitan Jonah immediately after his election in November 2008 committed himself to visiting the Orthodox patriarchates and autocephalous churches, starting with the Patriarchates of Constantinople and Moscow. These important visits were arranged without any difficulty.

In April 2009 Metropolitan Jonah, in a sermon given in Dallas, Texas, offered public criticism of the Ecumenical Patriarch and the position taken by the Patriarchate of Constantinople on the Orthodox "diaspora." Before long, His Beatitude understood that he had to offer a public apology to His All Holiness Patriarch Bartholomew. This apology was posted on the Orthodox Church in America's web site at the end of Holy Week 2009. An immediate consequence of the Dallas sermon and the resulting controversy was the cancellation by the Ecumenical Patriarchate of the scheduled visit of our Primate to the Patriarchate. Efforts to renew the planned visit have been unsuccessful.

In 2009 His Beatitude Metropolitan Jonah made his official visits as the newly-elected Primate of the Orthodox Church in America to the Moscow Patriarchate where he was extended cordial hospitality by the newly-elected Patriarch Kirill and to the Patriarchate of Georgia, where the long-time Catholicos-Patriarch Ilya extended warm hospitality.

At the funeral of His Holiness Patriarch Aleksy of Moscow (December 2008), the Orthodox Church in America was represented by His Eminence Archbishop Seraphim of Ottawa. His Grace Bishop Benjamin of San Francisco and His Grace Bishop Tikhon of Philadelphia represented the Orthodox Church in America at the enthronement of Patriarch Kirill of Moscow (February 2009).

In 2010 His Grace Bishop Melchisedek of Pittsburgh represented the Orthodox Church in America at the enthronement of Patriarch Irinej of Serbia and in 2011 His Grace Bishop Benjamin of San Francisco headed a delegation of the Orthodox Church in America to Prague and Bohemia and Moravia at the invitation of His Beatitude Metropolitan Krystof of the Church of the Czech Lands and Slovakia. It was the intention of His Beatitude

Metropolitan Jonah to lead this delegation, but the illness and death of His Eminence Dmitri, retired Archbishop of Dallas, prevented our Primate's trip to Prague.

The creation of the Assembly of Bishops for North America was initiated by the inter-Orthodox process of preparation for the anticipated Great and Holy Synod. The Assembly's first meeting took place in New York in 2010, the second was convened in Chicago in 2011. The Standing Conference of Canonical Orthodox Bishops in the Americas (SCOBA) has been supplanted by the Assembly of Bishops. The new Assembly has taken on responsibility for the agencies which had been doing their work under the aegis of SCOBA.

Until April 2009 it was the understanding that the Orthodox Church in America, although not recognized as an autocephalous church by all the Orthodox Churches, would nevertheless be a full participant of the Assembly of Bishops. This meant that the Primate of the OCA would be seated in the Executive Committee of the Assembly. In May of 2009 the message was conveyed that this formula would not be applied. While the bishops of the OCA were all invited to the Assembly, the OCA would not have a seat on the Executive Committee. As a consequence, the hierarchs whose decisions are subordinate to the Holy Synods of the Patriarchates of Constantinople, Antioch, Moscow, Serbia, Romania, and Bulgaria are represented in the Assembly's Executive Committee, while the hierarchs of the Orthodox Church in America are not represented in the Executive Committee.

In the course of 2009 His Beatitude Metropolitan Jonah, in addresses at the Assemblies of the Diocese of the South and the Diocese of Canada, offered his initial thoughts on his vision of the status of the Orthodox Church in America, suggesting the possibility of relinquishing the autocephaly in favor of "maximal autonomy" within the Moscow Patriarchate. Metropolitan Jonah invited His Eminence Metropolitan Hilarion of Volokolamsk, Chairman of the Department of External Church Relations of the Moscow Patriarchate, to explore this question with hierarchs of the OCA and the Church's officers and others. The Moscow Patriarchate, in the words of Metropolitan Hilarion, remains committed to the autocephaly it granted to the OCA in 1970 and will continue to support this autocephaly. On the other hand, if the desire emerges within the OCA to re-assess its autocephaly, the Moscow Patriarchate is willing to participate in such a re-assessment.

In February the Holy Synod of Bishops, chaired by Metropolitan Jonah, met in Santa Fe, New Mexico, in the context of a Holy Synod retreat. At this meeting a clear understanding was reached that our Primate needed a time of rest and would take a leave of absence of at least three months. Immediately, misinformation was spread through the internet that our Primate had been deposed. Understandably, this caused serious concerns, particularly in the Moscow Patriarchate. Meanwhile, the Holy Synod, in order to protect the dignity of all concerned, especially Metropolitan Jonah, in its initial statement did not identify His Beatitude's time of rest as a leave of absence. In his own statements, His Beatitude said he was in a time of retreat during Great Lent. The Holy Synod authorized the posting of the full information on the Santa Fe decision on the OCA web site.

In order to understand better what was occurring in the Orthodox Church in America, His Holiness Patriarch Kirill of Moscow delegated His Eminence Metropolitan Hilarion of Volokolamsk to travel to the US for conversations with Holy Synod members and others. Archpriest Nicholas Balashov, Deputy Chairman of the Department of External Church Relations of the Moscow Patriarchate, accompanied Metropolitan Hilarion. In a full day of conversations with some members of the Holy Synod and a number of OCA clergy, the guests from the Russian Orthodox Church gained a fuller picture of the internal situation of the OCA and shared their perspectives in this matter.

During the past three years the Orthodox Church in America and the Russian Orthodox Church Outside of Russia (Moscow Patriarchate) have strengthened their relations through concelebrations, most notably a recent concelebration at St. Nicholas Cathedral in New York City (Moscow Patriarchate) by His Beatitude Metropolitan Jonah (OCA), His Eminence Metropolitan Hilarion (ROCOR), and His Eminence Archbishop Justinian (Moscow Patriarchate). A joint commission of the OCA and ROCOR has done useful work to build a common and harmonious relationship.

One result of the conversations initiated by Metropolitan Jonah on the subject of “maximal autonomy” was the Encyclical of the Holy Synod affirming the autocephaly of the OCA. This encyclical, signed by Metropolitan Jonah and all of the hierarchs of the Holy Synod, re-affirmed the vision and purpose of the autocephaly. The mission of the OCA, according to this vision, is to strive for Orthodox unity in America while advancing Orthodox mission and witness.

In the discussions on the autocephaly of the OCA the theme of the identity of our Church and her faithful came to the foreground. The OCA hierarchs, clergy and faithful do not see their identity in the Orthodox Churches of Eastern Europe and the Middle East. The OCA finds its identity in the North American context. At the same time, the OCA strives to maintain the unity of the spirit in the bond of peace in communion with the Orthodox patriarchates and churches and is eager to express its love for and solidarity with the Orthodox family of churches.

## ECUMENICAL RELATIONS AND INTERFAITH RELATIONS

The Orthodox Church in America, like the other Orthodox Churches, has its presence and mission in societies in which other Christian churches and communities are also present. In some places, the Orthodox Church is in the majority (for example in Russia, Georgia, Greece, Romania, Bulgaria). In other places, , the Orthodox Church is one of the Christian minorities within majority Muslim societies (for example, Syria), and in yet other countries, such as the United States and Canada, the Orthodox Church is a small minority among majority Christian communities.

In all places and circumstances, the Orthodox Church looks for ways to relate to others in peace, yet also looks for the appropriate ways to witness to the Gospel of Christ and the Orthodox faith. The primary locus of relationships with other Christians is certainly in

the daily life of Orthodox Christians, and in the life of Orthodox parishes. Yet there is a need for Orthodox presence in national and world bodies.

The Orthodox Church in America, alongside other Orthodox Churches in the US and Canada, participates in the National Council of the Churches of Christ in the USA and in the Canadian Council of Churches. In addition, in the US the OCA is one of the Eastern and Oriental Orthodox Churches participating in Christian Churches Together in the USA, a forum which brings together the wide spectrum of American Christians - Pentecostal and Evangelical, African American, historic Protestant, Catholic, and Eastern and Oriental Orthodox. The OCA also is represented in the governing body of Church World Service, a major relief agency with Protestant and Orthodox membership.

The Orthodox Church in America, together with the great majority of Orthodox Churches, participates in the World Council of Churches. Here, special attention is given to the Central Committee (the main governing body of the WCC) and the Faith and Order Commission.

In all of these settings, the Orthodox Church in America collaborates with the other Orthodox Churches.

During recent years it has become evident that among our neighbors and fellow-citizens in the US and Canada are many people of other religious communities. In other countries, our fellow Orthodox are also in close proximity to communities of other religions. It has become important for all of us to acquire the capacity to understand one another and to live in peace with one another.

The World Conference of Religions for Peace is the world's largest network of inter-religious councils. The headquarters of Religions for Peace is in New York City. Since 2006 Fr. Leonid Kishkovsky, the OCA's Director of External Affairs and Interchurch Relations, has been the Moderator of Religions for Peace.

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

St. Catherine the Great Martyr Church in Moscow, as the OCA's Representation Church, is a useful point of contact and communication between the OCA and the Patriarchate of Moscow. The Representative of the Orthodox Church in America to the Patriarch of Moscow is appointed by the Holy Synod of the Orthodox Church in America, and reports to the Holy Synod through the Primate of the OCA. During the past decade the Representative has been Archimandrite Zacchaeus (Wood). Since July 2011 Fr. Zacchaeus is on Leave of Absence, and the interim Representative is Fr. Leonid Kishkovsky, Director of External Affairs and Interchurch Relations.

Since the terrorist attacks in New York, Washington, DC, and Pennsylvania on September 11, 2001, it has been the custom to celebrate a memorial service each year commemorating the men and women who were killed in this terrorist violence.

September 11, 2011, marked the tenth anniversary of 9/11. Fr. Leonid Kishkovsky was in Moscow for the tenth anniversary commemoration. After celebrating the Divine Liturgy on Sunday, September 11, Fr. Leonid concelebrated a memorial service with Igumen Philaret (Bulekov), Deputy Chairman of the Department of External Church Relations of the Moscow Patriarchate.

Both Fr. Leonid and Ambassador John Beyrle, US Ambassador to the Russian Federation, spoke at the end of the memorial service. They referred to the solidarity of the American and Russian nations and people in their suffering as a result of terrorist violence and in their remembrance of those who have been killed as well as their grieving families and communities.

The tenth anniversary observance at St. Catherine's Church concluded with the ringing of the bell in the church garden. Fr. Leonid Kishkovsky, Fr. Philaret (Bulekov) and Ambassador Beyrle together rang the bell ten times.

During his visit to Moscow, Fr. Leonid met with Metropolitan Hilarion and with other officials of the Moscow Patriarchate.

**ARCHPRIEST LEONID KISHKOVSKY  
DIRECTOR OF EXTERNAL AFFAIRS AND INTERCHURCH  
RELATIONS**