



**ORTHODOX
CHURCH in
AMERICA**

Metropolitan Council Meeting

Spring 2015

Officers' Reports



**Meeting of the Metropolitan Council
February 10 to February 12, 2015
Officers' Reports**

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REPORT OF THE METROPOLITAN

SPRING SESSION OF THE METROPOLITAN COUNCIL

FEBRUARY 10-12, 2015

Introduction

I welcome everyone to the Spring Session of the Metropolitan Council and thank you for your willingness to brave this winter's now apparently traditional Monday winter storm to gather for the important work we have to tackle. We are pleased to have with us His Eminence, Archbishop Melchisedek, of Pittsburgh and Western Pennsylvania and His Grace, Bishop Mark, of Philadelphia and Eastern Pennsylvania, who, for this year, are members of the Lesser Synod, along with myself and Bishop Michael, who is not able to be here this week because of a previous speaking engagement in California.

I would like to keep my report brief this morning to allow for more opportunities for interactive discussion with the members of the Metropolitan Council. One such opportunity will be immediately following my report and another will be on Wednesday afternoon, when we have allocated a period of open discussion. I look forward to receiving your valued input on the work of our Orthodox Church in America.

The All American Council

As you know, we are preparing for an important event in the life of our Church, the Eighteenth All American Council which will be taking place this coming July in Atlanta, Georgia. I am grateful to His Grace, Bishop Mark, the Chairman of the Pre-Conciliar Commission, and its many members including an energetic group on the Local Committee, for their tireless and professional work. This is reflected in the report we will hear later this week, which will include some further updates from the latest meeting which was held last week at the Chancery. I am pleased with the progress and grateful for the leadership shown by His Grace and Fr. Eric, as well as Fr. Myron Manzuk and Peter Ilchuk and all those who work closely with them. I feel confident that we will have a solid and productive council this year.

I believe very strongly that this particular Council will be a turning point in the life of the Orthodox Church in America. One could argue that the past three or four Councils have likewise been major turning points as well. However, it seems to me that each of those was held in the context of crisis. The changing reality, not only within the past 10 years, but within the past 45 years, of our existence as an Autocephalous Church, is reflected in one of the two major concrete actions that will be considered in Atlanta, the proposed Revision of the Statute of the Orthodox Church in America. His Eminence, Archbishop Nathaniel and

the members of the Statute Revision Task Force have done an outstanding job with this over the past 18 months. Fr. Alexander Rentel will provide us with more details but I would like to underscore the importance of this excellent work, not simply as an exercise in administrative and corporate organizing, which it is not, but rather as a means to express the reality of our Church as it is lived today and as it has been forged by the last forty-five years of its existence. I believe that it is precisely the difficulties that we have faced in the more immediate past that have helped to crystallize our approach to the Statute which finds its basis as a legal document but nonetheless enshrines our Mission as a Church.

The second major concrete action that will be required at the All American Council will be the approval of a Resolution on Church Funding. The Chancellors and Treasurers of the various dioceses met at the Chancery last week (although many were prevented from participating because of the weather both that week and the previous week when the meeting was originally scheduled). I am thankful to our OCA Treasurer, Melanie Ringa, for her diligence in pursuing this important matter, not only recently, but in the years since the All American Council in Seattle. It has involved numerous meetings, not only at the annual Chancellors and Treasurers Meetings but through many visits to the various dioceses.

Melanie has a gift for both seeing the larger picture of things, recognizing and understanding the local situation within each of our dioceses and guiding us towards consensus on a very divisive and emotional issue. Her leadership appears to have brought us to an agreed-upon approach to the question of establishing an equitable and workable system for funding the Central Administration. It was proposed that Melanie continue to hold individual discussions with the diocesan administrations to work on individual plans. A final meeting of the Chancellors and Treasurers will take place within the next few months to finalize the wording of the resolution to be presented to the All American Council. I will leave it to Melanie to provide more information on this in her report.

Discussions at the Chancellors and Treasurers Meeting and also at the Preconciliar Commission Meeting have, of necessity, focused on some practical concerns, including the need for fairness in the participation of each of our OCA dioceses in the funding of the Church and the All American Council. While I will be discussing this particular issue more fully with the Holy Synod at our upcoming Spring Session, and while I acknowledge that these questions are very complex and involve sensitive issues for all those involved, I think that there is a fundamental issue that goes deeper than the question of financial participation and equity. And that is the issue of our identity as the Orthodox Church in America. We have, in the last two Councils, made an effort to assist those from the Diocese of Alaska and the Diocese of Mexico, in particular, in their participation in the All American Council. We are planning similar assistance for this year's Council, but I would ask us to reflect upon the reality that the ethnic dioceses of the OCA also are an important part of our history and heritage.

I would ask each of the members of the Metropolitan Council to encourage participation in the All American Council, and especially to motivate the youth to participate in the Youth Component of this year's council. Andrew Boyd, the chairman of the Youth and Young Adults Department, together with many others, have been instrumental in bringing back this important piece that has been lacking in our most recent councils, for various reasons,

and it is a very hopeful sign that we are once again directing our attention to the mission of the youth.

Expanding the Mission

At this point, I would like to offer a few words on the theme of the Council: “How to Expand the Mission,” and how that theme might reflect both where we have been and where we are going as the Orthodox Church in America. To do this, I would propose that, before the Church can tackle the question raised in the theme, we must first answer some fundamental underlying assumptions:

- I. What, exactly, is the Mission that we are called to expand?
- II. Why is the Orthodox Church in America qualified to undertake this task?
- III. If it is so qualified, who, within the Orthodox Church in America, is called to do this? And are we prepared to undertake it?

I will be addressing these broader questions as part of my Report to the All American Council, but it is my intention to lead up to this report by means of preparatory reports to be delivered, hopefully via video, in the months leading up to the Council. My purpose in this is to cover a number of matters prior to the council and to allow for my report at the All American Council to focus on the theme itself and on some concrete actions that the Church might agree to undertake in the next triennium as a means of expanding the mission on a diocesan, deanery, parish and personal level.

What is the Mission? – The Apostolic Work of the Church

Archbishop Anastasios of Albania reminds us that: “each one of us personally, bears his or her share of responsibility, as a living cell of this organic whole. Interest in apostleship, in mission, is not the specialty of particular groups or individuals, but a definitive characteristic of the Church herself. It is designated as the occupation of the Church. It is the *sine qua non* of its life.”

In this light, I have been trying to emphasize this apostolic work, this mission (apostoli) which is our common labor, and I hope, our common love. Last March, I presented a draft statement to the Holy Synod, with the title “The Apostolic Work of the Church”, in which I highlighted the three specific areas of interest that would seem to be prime areas where our apostolic labors and love might be fruitfully applied: 1) Missions and Evangelism, 2) Clergy Health and 3) the strength of our institutions, particularly Monasteries and Seminaries.

1) Missions and Evangelism

As was reported at the last Metropolitan Council meeting, we are well on our way to implementing the first Mission School this coming April, which was the project approved by the Holy Synod as the best use of the generous bequest received by the OCA for use in the area of missions and evangelism. This was the result of the work of a special Missions Task Force which met to consider the various options for the use of this bequest. Of

nineteen possible proposals that were considered by the Task Force, three were forwarded to the Holy Synod and the Mission School was chosen as the single option that would be encouraged.

Fr. Eric has been working diligently with the members of the Task Force to prepare the curriculum and structure the week-long school which has been scheduled for April of this year. The Holy Synod decided that, at least for this first attempt, that each bishop would appoint or choose a clergy and layperson from his own diocese to send to the school.

In all that we undertake for the cause of expanding our missions and our evangelism, we must begin with prayer. Fr. John Parker, the Chairman of the OCA Department of Evangelization has prepared a special Molieben for Evangelization which was forwarded to me by His Grace, Bishop Michael. I will be presenting this draft to the Holy Synod at our meeting in March and requesting their approval for its use within our parishes as a tool to encourage missionary outreach within our local communities.

2) Clergy Health

I am pleased to announce that the Pastoral Life Committee, which was recently blessed by the Holy Synod to begin its activity again after a long period of inactivity, has been reorganized under the direction of our Chancellor, Fr. John Jillions, and with the able assistance of Father Nathan Preston, of the Albanian Diocese, who is serving as Administrator. The first event being planned is a colloquium at which a clergy representative from each of our dioceses will participate in creating a vision for the rebirth of this ministry in the Church. As Fr. Nathan writes in his letter to the bishops, this would be “a vision of service and ideals yet grounded also in the wealth of experience and pool of pastoral knowledge of those in attendance.”

It is my hope that the Pastoral Life Committee will be a positive force in strengthening a sense of brotherhood among our clergy and a forum to solicit input from them on a wide range of issues, including the continuing process of Statute Revision which will shortly enter into the phase of Church-wide review and the ongoing discussions within the Assembly of Bishops (more on this below). I have also previously directed that the Pastoral Life Committee would be an appropriate place at which to discuss the pastoral response needed to various difficult issues facing contemporary society, including topics such as those raised in a recent issue of the Youth Department’s Wonder blog.

Clergy health also involves real issues such as clergy salaries, retirement benefits and health and life insurance. We will hear a presentation from the Pension Board this week and I would encourage our Metropolitan Council representatives to remind their diocesan administrations and parishes of the crucial importance of the OCA Pension Plan for the well-being of all of our clergy and to encourage parish participation in this plan, which was in fact, mandated by the Holy Synod many years ago.

We will also be hearing presentations from two organizations, the Fellowship of Orthodox Christians in America (FOCA), which is co-sponsoring the All American Council in Atlanta and holding its Annual Convention in conjunction with it, and the Russian Brotherhood

Organization (RBO) which is a fraternal organization, not presently directly connected to the OCA, but offering services that might be useful to our clergy and faithful in the area of life insurance and various annuities. Both of these groups have some contributions that could be helpful for the strengthening of our care for our clergy and for the building up of stronger relations between our parish communities.

3) Monasteries and Seminaries

The third area of emphasis that we need to focus our attention on is the strengthening of our Church-wide institutions, particularly our Monasteries and Seminaries. Last year, I called together the first Synaxis of Monastery Superiors at the Chancery and several areas of mutual concern to all the Abbots and Abbesses that were present were outlined. We have also planned a second Synaxis, which will take place on November 27-29 of this year at the St John of Shanghai Monastery in Manton, California.

There are many challenges facing our Seminaries and some of the most crucial are being reviewed within the Holy Synod on an on-going basis. I would like to address my comments to the broader area of Theological Education, which includes not only our seminaries, but continuing education for clergy, adult education, catechetics in general as well as education for our youth and children. What is our level of support as a Church for all of these? Is there a need for a more comprehensive and overarching approach to every aspect of theological education? We need to begin to look at these questions from the broadest standpoint, not from a partisan view or with a narrow focus. Is every member of our OCA, every parish and every diocese, supportive of Theological Education and how can this best be shown?

These three areas will continue to be my focus and I invite the Church at large, represented here by all the diocesan and at-large members of this body, to join me in both the foundational emphasis on our apostolic work as well as the concrete implementation of these several concrete endeavors that are coming to fruition:

Why the OCA? - Our Contribution to the Assembly of Bishops

I would like to open this discussion with reference to the Archives Advisory Committee, the members of which are here with us today and from whom we will receive an update on their work, including their most recent meeting yesterday. I was able to join this committee for many of their meetings and conference calls and I would like to share with you my joy at seeing such an engaged group of professionals who have a true love, not only for the Archives but also for the Church and what those archives represent.

Last September the Assembly of Bishops of the United States met to consider two proposals for canonical and regional planning within our Assembly. It has been the mandate of the Chambésy process for each of the thirteen Assemblies throughout the world to come up with a plan for the canonical normalization of the Orthodox Churches in the so-called diaspora so that these plans could be discussed at the planned Great and Holy Council scheduled to convene in 2016. At the most recently Assembly in Dallas, our Holy Synod presented a preliminary response to the two proposals that were being discussed, which is

available for viewing on the [OCA website](#). There was no conclusive decision made by our Assembly about either of the two proposals.

Following the Assembly in September, a request was made by the Chairman of the Assembly, Archbishop Demetrios, for jurisdictional responses to the second proposal, which was re-labeled as a “Common Starting Point” for all the bishops’ consideration. As I speak, the Holy Synod is reviewing our draft response to this “Common Starting Point.” I have brought this draft document with me and I am prepared to share its content with the members of the Metropolitan Council, since it speaks to our position as the Holy Synod of Bishops. I would invite your thoughts and comments as well as your professional and experiential input into this document, which I would foresee as becoming a more comprehensive position paper on the position of the Orthodox Church in America.

If I might mention but one aspect of the discussion at the Assembly level, there is much emphasis on the ethnic component, with quite a large group among the bishops seeing little need for a united administrative Church in the US and much need for the Mother Churches to pastorally care for the faithful of their ethnic and cultural background. This is an area where our own historical experience with various ethnic groups might be a positive contribution, since we not only have the three specific ethnic dioceses, Bulgarian, Romanian and Albanian, but the experience of perhaps a majority of our parishes is increasingly pan-Orthodox and pan-ethnic, including a growing number of converts. It behooves us to highlight and strengthen this aspect of the life of our Church while at the same time continuing to forge our common identity as a North American Church.

Are we Prepared? – The Work Ahead

All of this raises the question of whether we are truly prepared as a Church to undertake the task of expanding the mission. The Orthodox Church in America has passed through a difficult period during the previous ten years. I am convinced that it is by the grace of Almighty God and through the labors and sacrifices of talented and faithful clergy and laity within the Orthodox Church in America, that we have come through the challenges of the past as a stronger Church with a deeper understanding of ourselves and of our mission.

The Holy Synod of Bishops continues to develop a deep sense of brotherhood and practical application of conciliarity. At the same time, the Synod continues to be strengthened by the filling of our diocesan vacancies, with at present only one diocese remaining vacant. Our meetings have become more and more productive and we have been able to incorporate more elements such as retreats in our activities as a Synod.

As Metropolitan, I have been able to focus on one of my major statutory responsibilities which is to represent the Orthodox Church in America in her dealings with other Churches and organizations. As such, the month of December was quite full for me with contact with three Patriarchs: 1) Patriarch Bartholomew of Constantinople, whom I visited as part of St. Vladimir’s Seminary Pilgrimage to Halki; 2) Patriarch Kirill of Moscow and All Russia, as part of my official Protocol Visit to the Church of Russia and 3) Patriarch John of Antioch,

with whom I concelebrated at Sts. Peter and Paul Antiochian Church in Potomac, Maryland during his recent visit on the occasion of the enthronement of Metropolitan Joseph.

Fr. Leonid Kishkovsky's Report outlines some further activities in which the Orthodox Church in America has been actively involved in terms of External Church Relations. I am pleased to say that our relations with our sister Churches continue to be fruitful on many levels.

I am grateful for the work of every member of the Metropolitan Council, with each of you bringing a wealth of professional expertise as well as the input of your respective dioceses. The controversies that shook our Church in the past no longer occupy the majority of our time and we can now focus on the positive actions and programs that will help our Church to truly "expand the mission." In particular, I would like to thank Judge ER Lanier, the Chair of our Legal Committee, who will be coming off the Metropolitan Council this year. His contribution, not only to that Committee, but also to the entire Metropolitan Council and the work of the entire Church, is immeasurable and invaluable. His ability to contribute so eloquently and with such clarity to the many issues we face, and to do so even as he labors on the Legal Committee and on specific projects such as the Statute Revision Committee, is a gift for which we should all truly be grateful.

I am thankful as well for the work of all the Officers and Staff at the Chancery, each of which has a unique and important contribution to make to the work of the Church, which is truly multifaceted and complex. I spoke earlier of Melanie's excellent contributions to the Chancery work and Fr. John continues to assist me in a multitude of ways as Chancellor. I am particularly pleased with the work of the Pastoral Life committee and hope that this will continue to be one of the many avenues by which we assist with the spiritual, emotional and physical health of our clergy. Fr. Eric continues to do an amazing job as OCA Secretary and is able to masterfully deal with a multitude of areas as reflected in his very comprehensive report on the Mission School, human resources, operations, insurance questions, estate management (with special thanks to Eagle Scout candidate, Alexander Tosi for his project of renovating our signs and landscaping) and Communications. On the latter, he is ably assisted by Fr. John Matusiak, Jessica Fuhrman and Ryan Platte.

Concluding Thoughts

In conclusion, I would like to once again give thanks to God for the many talented contributors to the life of the Orthodox Church in America, in particular for each and every one of you, as members of the Metropolitan Council. It is truly a great blessing that each of us is able to contribute our part to the whole, so that every part is working for the building up of the body of the Church. At the same time, the larger body is composed of unique persons, each of whom is able to say, as we all do on the threshold of the Great Fast: *As I ponder in my wretchedness, the many evil things that I have done, I tremble for the fearful day of judgment. But trusting in Thy merciful compassion, like David I cry to Thee: Have mercy upon me, O God, in Thy great mercy.*

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Chancellor's Report
Planning for the Future: Pastoral Life and Ministry

Introduction

We are blessed as the OCA at this point in our history to have administrative calm. We are able to turn our attention away from crises and toward stable planning and actions to build up the Church we love both spiritually and practically. Over the past year His Beatitude has cited three main areas for our focus: evangelization, clergy health, and our church institutions (particularly seminaries and monasteries). As you can see from the detailed reports of the Secretary, Treasurer, Director of External Affairs and all the Departments, Offices and Commissions there is a lot happening, and we can be grateful to our Lord and to the faithful clergy and laity who work with Him at every level of the Church: personal life, families, parishes, deaneries, dioceses, monasteries, military and institutional chaplaincies, seminaries and central church administration. In this report I'll outline plans for revitalizing the Department of Pastoral Life and Ministry, list other objectives for 2015 and summarize my activities as chancellor (some of which can be seen several times a week in the *Chancellor's Diary*, <http://oca.org/reflections/fr.-john-jillions>).

Department of Pastoral Life and Ministry

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

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

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

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

Initial Plan: Engaging the Dioceses

One of the primary aims is to foster clergy brotherhood on local, deanery, diocesan and OCA-wide levels, with cross-pollination between clergy of the various dioceses. A lively brain-storming session at last Fall's Metropolitan Council meeting put forward a host of possible areas the department could begin to discuss, study and address. More ideas came from the subsequent discussion with the Holy Synod.

- Sabbaticals for clergy
- Ways to recognize and deal with burnout and depression, substance abuse
- Life insurance, ADD (Antiochians and GOA automatically provide basic life insurance)
- Mentoring of new clergy
- Handling the stresses of having other employment
- Small group discussions to build mutual honesty, trust and emotional health among clergy
- Deanery strengthening
- Building sense of clergy brotherhood
- Parish internships for seminarians and new clergy
- Spiritual health; continued spiritual formation
- Marriage and family health
- Support for children of clergy
- Scholarship fund for children of clergy
- Concern for widowed matushki
- Pension, health care, hospitalization, long-term care expenses
- Retirement planning
- Financial planning
- Health education, stress management, diet and exercise education
- Assisting clergy and parishes in crisis (misconduct, family, finances)
- Assisting clergy and parishes that have to deal with reporting misconduct, investigating it and dealing with fallout
- More awareness of the Personal Assistance Program
- Help with finding positions in parishes
- CPE, Chaplaincy certification

The first task is to listen to the needs of the various dioceses and their clergy. With the blessing of His Beatitude, Fr Nathan has contacted all the bishops and diocesan chancellors to bring together representatives from each diocese for a consultation in the next two months. This will provide a forum where we can begin to hear, speak, learn and set a direction that will serve the real needs of our clergy.

A forum for discussion of controversial pastoral issues

One of the tasks His Beatitude is assigning to the Department of Pastoral Life and Ministry is to take forward the discussion provoked by Fr Robert Arida's essay published on the OCA's *Wonder Blog*.

Although Metropolitan Tikhon responded at length, the issue has not at all gone away. On the contrary, some expressed dismay that his words were soft and equivocating, and the matter continues to be discussed by clergy and laity inside and outside the OCA, with some calling into question the integrity of our bishops. Others are calling for a full airing of the incident and its fallout at the All American Council. And some are planning to draft a resolution calling on the Holy Synod to address the matter formally.

Metropolitan Tikhon's Response

We need to hear again what Metropolitan Tikhon said about the Arida controversy. His Beatitude affirmed the traditional teaching of the Orthodox Church, but he also rejected the role of "thought police."

As a preface to my own reflection below, I would like to offer a clarification on the question of oversight. Although the Holy Synod takes the sacred confession of the holy dogmas of the Orthodox Church with the greatest of seriousness, it is not charged in the matter of *theologoumena* and areas requiring pastoral discretion and *economia* to function as a sort of "thought police" but rather, each bishop is entrusted with leading and guiding his flock within the light of Christ, according to the commandments of the Gospel and within the norms of the holy canons and the teachings of the Holy Fathers. On occasion, the Holy Synod does issue directives and encyclicals on various timely subjects and themes that require a clear statement to the flock.

Going further, His Beatitude put the matter in its proper personal and pastoral context, remembering that we are not dealing with abstract issues but with real flesh and blood human beings, parishioners, our brothers, sisters, children and the people who come to us—whatever their background, sins and spiritual illnesses, known and unknown—looking to find in our parishes a place of refuge, comfort and healing.

When a human being either undergoes such difficulties or is charged with ministering or helping someone in such a situation, the discussion ceases to be merely academic and becomes very real and immediate. I would not want us to lose sight of the human person and his salvation in Christ when we talk about "culture" and its relationship to the Church.

In our Orthodox context, we are very good at speaking to each other, but we are less successful when trying to speak to those "who are not my people" (Hosea 4)

in order to make them disciples of Christ. We must be willing to admit that, in many ways, the earthly representatives of the Orthodox Church – bishops, priests, and lay folk – have failed to address the culture in a meaningful way.

But perhaps we need to begin by listening more and asking ourselves if we are truly able to hear the questions that are being asked by our college students, by our relatives, by the strangers we meet on the street, by our neighbors? ...I would encourage all of us to open our ears to their voices and questions, so that we might help them to more effectively resist the temptations of the secular world and make their own the truth of Christ and the Gospel.

In light of this deeply pastoral dimension to the questions we face about sexuality, His Beatitude recommended that the resurrected Department of Pastoral Life take this discussion forward.

The Holy Synod has also recently blessed the re-activation of the Department of Pastoral Life, which is in the process of being re-evaluated and will begin its work in the very near future. It seems that the present discussion on Gospel and culture is one that would benefit from a more in-depth analysis than can be provided on a blog. It will be my recommendation that the issues raised here be one of the first areas to be addressed by the Department of Pastoral Life and that all those who have contributed to this present discussion be invited to participate.

Discussion in the Metropolitan Council

The issue of the Arida article is also being raised within the MC. One member said this controversy—and implementing a more restrictive editorial policy—should be the main item in the open discussion portion of the meeting.

I believe we need to have a discussion on the editorial policy (or lack thereof) of the OCA for its official publications, websites, social media, etc. Some of the discussion needs to be a review of the outpouring of justified concern over the posting of the Fr. Robert Arida article on the OCA Youth Blog, the subsequent reaction of the administration to the concerns, and how we can avoid such kerfuffles in the future.

This in turn provoked a polite but equally muscular response from another MC member opposing such restraints:

Still, consideration needs to be given to the fact that what is “editorial policy” for one is a little more than a prior restraint on freedom of speech and opinion for another.

Should we not provide a forum for an exchange of ideas, even if those ideas are exposed to be heresy and contrary to Orthodox dogmatic and moral principles?

Putting a thought in a closet (so to speak) is rarely a good way of demonstrating how wrong it really is.

Competency to discuss

Is it our job as MC to address any of this? I think it is. We as the Metropolitan Council have the privilege of governance. This includes not only funding and carrying out plans, but also looking toward the challenges coming down the road. Together with Metropolitan Tikhon, the Holy Synod and the All-American Council, we have the task of looking beyond our own particular situation and asking what will most effectively protect, preserve and promote the spiritual and material patrimony of the Orthodox Church in America.

Fr John Shimchick, in his report to the MC on OCA Organization underlined the need for the MC to be a place of “balanced, intense, yet respectful conversation.”

What falls within the “competency” of the MC to discuss and how can we do that honestly, responsibly, yet with respect for each other? If St. John Chrysostom is correct and the family is a “small church,” then can we not view our presence on the MC as making the Orthodox Church in America — present among us? If we anticipate difficult conversations being raised from the floor at this summer’s AAC, can we not prepare both for the questions and responses by beginning that conversation now and modeling among ourselves — at least — the kind of behavior we hope will be present among our brothers and sisters this summer?

My own view—and I’ve heard others express similar sentiments—is that no one on the MC wants to take time out of their busy schedules (and vacation time) to just be a rubber stamp. And although there needs to be clear distinction between competency to discuss and competency to decide, the MC, like the AAC of which it is the extension, ought to be a place where everything can be discussed. So, while spiritual, moral, liturgical and canonical issues are matters for the bishops to *decide*, these same issues can be discussed at the MC, ideally together with the bishops present and participating. Indeed, this hierarchical-conciliar collaboration is at the heart of the OCA’s patrimony that we as MC members are pledged to protect.

Other objectives for 2015

Evangelization: launching the first annual week-long Mission School.

Stewardship and finances: in consultation with the bishops, chancellors and treasurers of each diocese a key objective is to draft an equitable plan for financing the OCA for presentation at the All American Council.

Statutes Revision: the Statutes Revision Commission under Archbishop Nathaniel expects to circulate for comment draft revisions to the Statutes in advance of the All American Council.

External Affairs: meeting with Bishop Alexander, Fr Leonid Kishkovsky and consultants to the Office for External Affairs and Interchurch Relations to plan for the future regarding the OCA's inter-Orthodox, ecumenical, interfaith and governmental relations.

Monasteries: holding the second annual consultation of abbots and abbesses to address common issues

Summary of Chancellor's Activities since Fall 2014 MC Meeting

As chancellor, I am expected to be aware of all the issues that might be affecting the OCA in order to be able to advise Metropolitan Tikhon appropriately. This makes every day extremely varied. Naturally, this also requires a team approach and the officers work well to overcome any "silo-ing" of information. Much of the correspondence and many of the conversations are confidential, and thus difficult to report on. Nevertheless, here is a brief summary to give you a sense of the areas I am involved in.

Meetings with Metropolitan Tikhon, officers, staff: we are working well together on the broad list of tasks we face daily. As Fr Eric Tosi noted in his report the *Employee Handbook* needs updating since it has not kept up with changes since it was composed in 2008. The officers will be working on this with the Human Resources Committee this year.

External affairs: Fr Leonid Kishkovsky will report in detail on the OCA's participation in inter-Orthodox, inter-Christian, interfaith and government related matters. One of the objectives for 2015 is to hold a consultation to plan for the future of the OCA's work in these areas.

Legal matters: Judge Lanier and the Legal Committee are working to set up a process for appointment of a General Counsel for the OCA. I've been involved in the complicated matter of resolving the Children's Home Board property that brings together representatives and lawyers of St Tikhon's Monastery, St Tikhon's Seminary, the Diocese of Eastern Pennsylvania and the OCA. Judge Lanier explains the details in the report of the LC. In addition, though not strictly a legal matter, Bishop Mark asked me to be on a committee working to iron out differences (mainly concerning bylaws) between the diocese and St Nicholas Church, Philadelphia.

Seminary issues: I reported on this in detail at the Fall meeting of the MC.

ORSMA: Cindy (Davis) Heise will give the report. I and SMPAC are grateful that her work as Coordinator continues to keep the OCA on track in addressing cases of misconduct. We have a team of excellent professionals who volunteer as consultants to ORSMA and work together very well: Bernard Wilson (investigative consulting), Robert Koory (legal) and Dr Albert Rossi (mental health.)

SMPAC: Dr Rossi will give the SMPAC report. The members of SMPAC meet generally every other week for 90 minutes to review cases and address policy and procedure

questions. Here too the members work effectively together to ensure the safety of our parishes, monasteries and church institutions. I am grateful to all the SMPAC volunteer members for their dedication and commitment: Dr Rossi, Bernard Wilson, Robert Koory, Fr Alexander Garklavs, Fr Ted Bobosh, Pdn Peter Danilchick (Met Tikhon, Cindy Heise, Fr Eric Tosi and I are ex officio members.)

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

St Sergius chapel: I serve as rector but celebrating the services is shared with Fr Eric Tosi, Fr Basil Summer and—when he is available—His Beatitude.

Chancellor's Diary, 3-4 times weekly. After completing a series on the 150 Psalms I am now writing a series on the Book of Acts. The brief scriptural reflection is accompanied by a few lines about what's happening at the chancery. I write these early in the morning before the workday gets going. The feedback has been encouraging, but I admit that the reflection and writing helps me put the work of church administration in perspective.

Respectfully submitted,

Fr John A. Jillions,
Chancellor

February 8, 2015

**Appendix:
Summary of Chancellor Travel and special meetings
November 1, 2014-Feb 8, 2015**

Sun 11/2-Wed 11/5

Ligonier, PA, Antiochian Village: Assembly of Bishops Pastoral Practice Comm.

Thu 11/6

St Nicholas, Philadelphia

Sat 11/8

Liturgy Sea Cliff (Bp Michael): Fr Leonid Kishkovsky elevated to protopresbyter
SVS: MT and Met Hilarion (Alfeyev); vespers; honorary doctorate

Sun 11/9

Liturgy at St Tikhon's Monastery

Mon 11/10

Philadelphia

Thu 11/13

SVS Board meeting; community Thanksgiving dinner; meeting with faculty

Fri 11/14

SVS board

Sun 11/16

Divine Liturgy at St Nicholas, Philadelphia; parish meeting

Wrightstown, PA: meeting with Fr Martin Browne and Pdn Gregory Moser

Mon 11/17-Tues 11/18

Russian Brotherhood Organization (RBO)

Sat 22/11/14

Wrightstown, PA: DEPA and St Nicholas Church committee

Dec 1-10

Delegation with Met Tikhon's Primatial visit to Moscow, St Petersburg

Dec 16-19

SVS delegation with Met Tikhon to Halki Seminary and Constantinople

Wed 1/21/15

Washington DC: RC Mass for March for Life at National Basilica

Thur 1/22

Washington DC: March for Life
Rose dinner

Fri 1/23
Library of Congress: Met Leontii Collection

Sat 1/24-Sun1/25
Wheaton, Illinois

Thurs 1/29/15
Bethlehem, PA: EPA Diocesan Assembly

Fri 1/30
Bethlehem, PA: EPA Diocesan Assembly
SVS: Schmemmann Lecture

Tues 2/3
Chancellors and Treasurers meeting

Wed 2/4
Preconciliar Commission

SEXUAL MISCONDUCT POLICY ADVISORY COMMITTEE
(SMPAC) REPORT
TO THE OCA METROPOLITAN COUNCIL
February 10, 2015

^ SMPAC continues to be grateful to be trusted by the Holy Synod with the awesome responsibility of being advisors to the bishops on matters of sexual misconduct.

^ SMPAC was created to work with and assist the Office of Review of Sexual Misconduct Allegations. SMPAC works very closely with Cindy Heise, who is a member of SMPAC and Coordinator of ORSMA. She continues to do excellent work handling the allegations of sexual misconduct that come to the ORSMA.

^ Clearly, the Metropolitan Council shares responsibility with SMPAC, along with ORSMA, for keeping a high bar on sexual misconduct issues. Two things are clear and need to be articulated regularly. First, we all want our Church to be a safe haven for all who enter, especially those who are vulnerable. Second, we are all on the same team to keep the Church a safe haven for all.

^ We on SMPAC continue to be alert to the learning curve as we deal with the issues. SMPAC does not investigate. ORSMA does the investigations. We abide by the “fairness to all policy.” On the one hand, we need to insure that the accused is not being accused falsely. On the other hand we need to be prepared to support and investigate any allegation of a complainant and bring the investigation to a strong recommendation.

One temptation in a “fairness to all policy” is to view the woman as the “temptress” and the priest as an “innocent

bystander.” This temptation lends itself to minimizing the allegation of the woman or blaming her for the situation. Unfortunately this temptation is embedded in some peoples’ minds, rather deeply.

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

A woman told me that when she was 16 years old a clergyman sexually abused her for months. She said that he groped and fondled her, never going to sexual intercourse. She said now that she is away from him she has serious problems going to Church and understanding the love of God. She said that the clergyman “raped my mind.” Her aftermath, like so many others, is serious, long term and deep. She may never fully get back her lost intimacy with Christ.

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

^ SMPAC continues to try to simplify background checks. ORSMA has the province of background check but SMPAC advises. Background checks can be used for any number of processes with varying degrees of thoroughness, depending on who is checking whom and for what purpose. For example, a bank conducting a background check will want to focus on fiduciary trustworthiness, while a background check for a correctional officer might want to focus on corruptibility and

anger management, among other facets. It is therefore important to understand that there is no “one size, fits all” background check.

There are two main reasons why background checks have come to occupy so much attention in religious institutions. The first can easily be discerned simply by reading newspaper accounts of past errors by church officials when dealing with unpleasant matters. For literally hundreds of years, it was believed that internal matters of a church should be handled internally.

The second reason for background checks is even more important, however. It is the innate right of people to have expectations that churches will be places of refuge and of joy,

^ SMPAC is recommending a one day workshop to the members of the Holy Synod to continue our work together to make the Church a safe haven for all, especially those most in need of safety.

^ SMAC expands its outreach to victims of sexual abuse. The purpose of such calls or visits are strictly pastoral, to express concern and interest (and not to further be involved in matters of investigation or of potential victim compensation, therapy or financial assistance.) Nor is the purpose of such pastoral follow-up to provide the victim details about any internal review process the OCA may have regarding the case in question.

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

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

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

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

^ There are many inherent problems with finding and keeping people for Response Teams. ORSMA establishes Response Teams and SMPAC advises on the process. The reasons are obvious and SMPAC continues to find new resources for Response Teams.

^ That a three-person response team is better than having just one investigator. This is primarily due to the benefit of having three different perspectives on a case. People hear things differently and one person may catch something the others don't.

^ We realize that essentially more education is needed and continue to expand the education/prevention activity.

^ SMPAC is proposing to the Holy Synod that there background checks on adult youth ministers who do not teach in Church school but who are working with youth. SMPAC also recommends that the PSPs be altered to say that all faculty and staff at the seminaries must receive background checks, not just applicants. Also, that parish council members must have background checks. The Holy Synod will decide these matters.

* * *

Secretary's Report
Archpriest Eric George Tosi
Spring 2015 Metropolitan Council Meeting
February 10 - 12, 2015

1. Overview

The work of the Church continues to be busy and multifaceted. Certainly the last six months have been marked by some major trips on behalf of the Church including Albania, Turkey, Russia, Dallas, Atlanta, and Washington DC. Each of these trips was either as a representative of the OCA or as part of a delegation. I am often reminded during these trips of the awesome privilege I have for serving in this position over the past six years, some of those during difficult circumstances. But I am also gratified to see how well received and respected the OCA is throughout the world and in the different organizations I have represented the Church. Very often we have influence far beyond our size and this is a great inheritance our blessed Church leaders who have come before us have bestowed upon us. It is important to not forget that through the plethora of work that faces our Chancery staff.

There are two major projects that will monopolize my time between now and the next Metropolitan Council meetings. The first is the 18th All-American Council. This will be reported on separately but needless to say the AAC is on track as registration has opened and documents are being prepared for dissemination. The second project is the Mission School which will be reported on separately. While this is a new project and there are some issues as it comes together, we must remind ourselves that we can often talk ourselves out of action. Sometimes we need to just work through and do what is needed to be done. No plan or time is ever perfect.

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

2. Human Resources

There are just a few issues to report though there is stability at this time in the staff. First is the continued work of managing the timesheets, vacations and hosts of other issues that come up on a weekly basis. There is nothing major to report. We will be working on extending Roman Ostash's R-1 visa and transitioning him to a Green Card. I have been in contact with his attorney on the matter.

Over the next year, the Officers will be working with the Human Resource Committee to review and update the Employee Handbook as we continue to evolve the Best Practices for the Chancery.

We will shortly be advertising the part time financial secretary position that was discussed at the last Metropolitan Council meeting. The delay has been on working through the exact work that needs to be done over the next year. I would emphatically state that our Treasurer needs the assistance. Otherwise we are in a stable position going in to the All-American Council.

3. Operations

Chancery operations continue to be diverse and hectic. The normal rounds of meetings, planning sessions and simply doing the business of the Church can fill the schedule very quickly. His Beatitude continues to meet with the Officers and prioritizes work and issues. The main job of the Chancery must continue to be supporting his work as his workload can often be full of activity. As the Secretary of the Church, my main duties lies in planning, administration and management of the many areas I am responsible. But lately we have been able to be proactive in planning and enacting some forward looking programs.

One of the more exciting prospects is the continuation of the Church reorganization project which began a few years ago with a special committee of the Metropolitan Council. We have been working on a plan for a tighter, more efficient and more focused organization of the Boards, Commissions, Departments and Offices of the Church. A proposal was presented to the Holy Synod which blessed the project to proceed. Fr. John Shimchick and Fr. David Lowell have taken up some of the details which will be presented at this meeting. The project will take some time to implement but I am excited at the direction this is moving as we seek to fulfill the mandate from many years ago to properly assign tasks and duties to the appropriate agencies and levels of Church administration.

A year ago, the Holy Synod blessed the use of the Evangelism bequest to be used for the creation of a week long Mission School. I am pleased to report that the first school will be held on April 20 to 24, 2015 at St. Andrew House in Detroit, MI. The curriculum and teachers have been established. It was decided by the Holy Synod that the first class will be one clergyman and one lay person from each diocese chosen by the bishop. They are free to choose and send those people who they have determined will have the greatest benefit for themselves and their diocese. We look forward to the first school and the plans to continue in the future.

We also had an informative meeting with the Russian Brotherhood Organization (RBO) which has been supporting many of our clergy and parishes on personal and life insurance. We are working on establishing a more concrete relationship with them over the coming years which will benefit the clergy of the Church. We are thankful for their continued support of the AAC and other projects.

We are pleased that the GAP Church Insurance program with Insurance Systems was able to return this year a total of over \$27,000 to participating parishes. The program returns a percentage of money to parishes insured through them when there is little loss.

This was the first time in three years that there was no loss. We look forward to continuing the program.

Health insurance through the Orthodox Health Plans continues to be a growing issue among all jurisdictions due to the increasing costs. I continue to participate in the meetings and continue to ask for lower cost alternatives. The health insurance system continues to become more complicated and costly for parishes, even for excellent plans that are well capitalized like the OHP. This will be a major issue for parish budgets in the coming years and there needs to be some proactive, pan-Orthodox work done in order to protect our clergy and their families.

While I will not go into detail about legal work, as that will be reported separately, I would note that there continues to be strong cooperative effort with the Legal Committee. There were a few legal issues that were worked through which involved areas as diverse as contracts to threats of legal action. Even without a current General Counsel, we have been able to keep on top of the work. An example is the work on a new contract with a Hungarian Church website which provided for the republication, in Hungarian, of Fr. Alexander Schmemmann's *Liturgy and Life* which is controlled by the OCA. Fr. Thomas Hopko's "Rainbow Series" was re-contracted with SVS Press and will be reprinted in a new style with new additions.

I continue to work on the background check program, assisting the dioceses and institutions on implementation. The program is evolving but becoming much more stable as issues are being worked through. This is also part of the ordination process which goes through the Chancery offices in different facets.

4. Councils and Synods

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

There will be a full report on the 18th All-American Council which is to be held in Atlanta from July 20 to 24, 2015 (a scant five months from now). The AAC is close to being finalized with some major decisions that will be made during this meeting. Among those decisions that need to be considered are:

- a. The proposed agenda for the AAC and the Plenary Sessions
- b. The list of guests and VIPs
- c. The Clergy and Lay Chairs of the Council
- d. The particulars of the Formal Dinner

- e. The presentation of the work of the Metropolitan Council to be done by the at-large members.
- f. Some specific logistical issues on the electronic registration, fees, elections, resolutions and the Statute Revision.
- g. Specific information for Metropolitan Council members.

It should be noted that the electronic registration has opened for delegates, observers, youth delegates and volunteers, and hotel registration. There have been a number of timely press releases on the many aspects of the AAC. Please go to the AAC website to see the good work. A final note is that Metropolitan Council members are asked to be available for dinner on Monday before the first plenary session and for lunch on Friday afternoon after the final plenary session.

5. Archives

The Archive Committee has a specific report that is included in the packet. Work has progressed with the Archives Committee and we must all thank Alex Liberovsky for the time he has spent on the project. There have been meetings with architects and archival experts. Much gratitude must go to the Skvir family who have worked with a number of volunteers to inventory and go through the massive amount of material. We are in a much better position to make decisions on the Archives as we go forward because of their hard work. More on the Archives will be discussed with the report.

6. Estate Management

The estate continues to be managed without any major issues at this time. The gutters were fixed and some were replaced with new copper drains that can be cleaned at the foot of the building. This will be continued in the spring. The Eagle Scout project was completed. There are a few major projects that will need to be completed or considered over the coming year. There will need to be the cleaning of the attics and basement over the summer. We will be facing two major issues. The first is that over the next few years we will need to put funds aside to re-roof the Chancery. It is not critical at this time but the current roof is now at twenty years old and some shingles are beginning to fail. The other is the repaving of the parking lot at some point. Again it is not critical but certain sections are beginning to fail and crumble and the parking lot is also around fifteen years old. At some point there will need to be a window technician to repair at least a dozen windows that no longer shut correctly or have broken parts. The windows themselves are in good shape. Other projects continue as they come forth though I would again remind the Council on the abandoned pool issue in the back of the property that needs to be resolved.

7. Communications

This portion of my job takes a considerable time, often during the weekends and off-hours. We have a great team and even though Fr. John Matusiak has retired from parish ministry, he will continue as our senior editor and writer. We are in daily contact and

often plan articles and postings well in advance. Jessica Fuhrman and Ryan Platte continue to provide technical support. Ryan will be addressing the Metropolitan Council on specific IT and technical issues.

I would make a note here of the editorial policy of the OCA communications team. There is a posted policy on the OCA website and other social media such as https://www.facebook.com/orthodoxchurchinamerica/app_317206868316569 or <http://oca.org/contact>. We fully support a reasonable editorial policy but have never had the real need as we deal with issues as they come forward. Fr. John Matusiak and I do review all postings for potential issues, though we do miss some, and have brought such issues to the attention of His Beatitude or the Synod if needed. If there is a need for a policy then I would recommend that the people who actually do the work and have expertise in the area be charged with the responsibility rather than reacting to any perceived or real issues.

The annual desk calendar was published and delivered with His Beatitude's Nativity message. We went to a new editor this year, Fr. and Matushka Margheritino. We are grateful for their good work in editing the desk calendar.

We are working in cooperation with SVS Press to publish the new metric book for clergy in time for the AAC. We also looking into updating and republishing the so called "Red Book" and the History of the Orthodox Church in America book.

Finally, the year end The Orthodox Church is being worked on and may concentrate more on the upcoming AAC. This is still in the works.

8. Crisis Management

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

9. Other

A continuing major project is the work on the clergy and chancery database. Some of the major phases are completed which leads to a host of new work which concentrates on retiring the old database, generating necessary reports and integrating the work into more streamlined and efficient system. Much thanks must go to Barry Migyanko and Ryan Platte who have spent many hours working though the issues. As a note, as we got deeper into the old database, we uncovered some major issues and glitches, not to mention unknown sections, which all had to be thoroughly examined and dealt with before moving forward. One misstep could have created new problems. It was very time consuming and other projects such as the AAC registration had to take priority at times.

Over the next year there will be a new master mailing list compiled, working systems efficiently generated and integration into Raiser's Edge, Financial Edge and the OCA website.

I continue to manage the Mentorship program for third year students at St. Vladimir's Seminary. I teach a class once a month and greatly enjoy my interaction with the seminarians. We have a record number (nine) placed in parishes. There are also a host of issues relating to ordination and placement after graduation in which I am involved.

I also continue to work with the Eastern Orthodox Committee on Scouting and the Religious Relations Task Force of the Boy Scouts. Three days after the All-American Council, I will be traveling to Japan to be one of the five chaplains at the World Jamboree and the first Orthodox Chaplain to a World Jamboree. I have been in contact with the Church in Japan and we will be doing some cooperative services while there. There are also a number of other projects I am working on such as ensuring Orthodox Feast Days are on all Scouting calendars and are observed as well as getting Orthodox prayer books and spiritual material in all major Scout camps.

I am sure I am missing other work that has been done and ask your forgiveness.

**OCA ARCHIVES ADVISORY COMMITTEE
REPORT TO THE METROPOLITAN COUNCIL
Spring 2015**

Members

Metropolitan Tikhon, *Synod Liaison*
Alexis Troubetzkoy, *Chairman*
Archpriest John Erickson
Dr. Jurretta Heckscher
Archpriest John Jillions, *OCA Chancellor*
Alexis Liberovsky, *Committee Secretary*
Lisa Mikhalevsky, *Metropolitan Council Liaison*
Melanie Ringa, *OCA Treasurer*
Gregory Shesko
Dr. Anatol Shmelev
Matushka Tamara Skvir
Archpriest Eric Tosi, *OCA Secretary*

Consultants

Sergei D. Arhipov
Dr. David Ford
Matthew Garklavs
Dr. Scott M. Kenworthy
Archpriest John Perich
Daria Safronova-Simeonoff
Eleana Silk
Popadija Kitty Vitko

Mission Statement:

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

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

At the 2014 Fall Session of the Metropolitan Council, further to the Committee’s written report, it was reported to you that we were planning to consult preliminarily with an architect regarding the possible construction of a new archival facility on the chancery property. Architect Joshua Frankel (Matushka Tamara Skvir’s son-in-law), of Ennead Architects LLP in New York City, which specializes in designing museum and archive building projects, visited the chancery on October 30, 2014. He was given a tour of the chancery building and archives, which was followed by productive discussion on possible construction and related issues. His Beatitude, Metropolitan Tikhon, the OCA officers, Matushka Skvir and the Archivist participated in this meeting with Mr. Frankel. The entire Committee will have an opportunity for further discussion with Mr. Frankel when he attends the Committee’s meeting, which is scheduled just prior to this Metropolitan Council meeting. Further developments will be reported to you during the Metropolitan Council session on Tuesday, February 10, which the members of the Committee will attend to present the results of its meeting to the Council.

In fulfillment of the Committee’s previous decision to hire a specialized consultant to evaluate the current environmental conditions in the OCA Archives, to suggest possible renovations and suggest appropriate monitoring of the environmental conditions, several highly recommended

firms providing such consultation were contacted. A very useful meeting with one such consultant took place at the chancery on January 20. His Beatitude, Metropolitan Tikhon, the OCA officers, Gregory Shesko and the Archivist participated in this meeting. The consultant was given an extensive tour of the chancery building and provided much useful information including the possibility of a two-pronged comprehensive assessment of our facility and collections by an environmental engineer together with a conservator, who would evaluate the state of our collections and the life expectancy of the items preserved in the OCA Archives. He additionally suggested avenues for possible grant funding of the assessment and subsequent measures to be taken based on these evaluations. The consultant's suggestions will be fully discussed during the Committee's upcoming meeting on February 8-9.

Thanks to the efforts of Matushka Tamara Skvir, who graciously volunteers at the archives on a regular basis, sometimes even bringing other volunteers to assist in her work, which is coordinated with the Archivist, the compilation of a consolidated overview inventory of all collections in the OCA Archives has essentially been completed. This inventory will continue to be refined and updated on an ongoing basis. It must be noted that while finding aids, which enable the retrieval of needed material, have long existed for individual collections in the OCA Archives, the consolidated inventory is already being used to cull redundant holdings and will provide a better sense of preservation needs. It will also aid in publicizing our collections and in the procurement of grants and other funding.

Additionally, the possibility of hiring student interns (both paid and unpaid) from local colleges or OCA seminaries continues to be explored. Some fruitful developments are anticipated soon in this regard.

These issues, as well as the possibility of some off-site storage, will be discussed during the Committee's meeting on February 8-9. The Committee is looking forward to meeting with the Metropolitan Council on Tuesday morning, February 10.

The Committee requests the continued prayers and support of the Metropolitan Council for the success of its upcoming meeting and its ongoing efforts to preserve properly the Church's archival treasures.

Respectfully submitted,

Alexis Liberovsky
OCA Archivist
Secretary – Archives Advisory Committee

February 2015 report on technology services

Ryan Platte, Technical Manager, Orthodox Church in America

Dear members of the Metropolitan Council,

Working closely with Barry Migyanko, I have delivered the new internal Chancery database application. We have migrated all the old Access data to it, and the new system is now the authoritative home of Chancery data. It has a strong authentication system, provides service only inside the Chancery's private network, and backs up regularly to a zero-knowledge backup system. I continue to maintain it, streamlining its use and adding needed features as it sees daily use in production.

Two technical projects regarding our hosting arrangement have been approved and are under way.

The first project is to retire our old hosting services. Our old primary host was a useful reference for the first two years after our large redesign, but it is no longer useful. That service has now been cancelled. Additionally, there are two different Windows-based servers that have been necessary to maintain services that could not be ported over with the redesign project; I am presently doing the work needed to bring those services over to the current system and retire those servers as well.

The second project is to upgrade our hosting to a stabler and more reliable environment. Our current hosting arrangement suffers periodic slowdowns that affect our ability to work, and hampers access to some features of the site. These problems are due to other users of the host machine who are using its resources heavily. Our provider has migrated us to other host machines at no charge several times, but this has provided only temporary relief. There are better options available, but at a higher cost for file storage, a resource we use plenty. I am working both to streamline our file storage and further improve the service we offer all the sites we host, including oca.org, the education classrooms and departmental sites. We are now using Amazon's S3 file hosting as a way to archive important files inexpensively. In addition to archiving of old digital assets, several OCA liturgical musicians are collaborating on a common store of the Church's digital music files using space we've provisioned for them.

Another major activity has been assisting with our first online registration for an All-American Council. I have worked with our AAC team and the vendor, providing testing, fixes, and feedback. I will be attending the All-American Council, presenting a workshop on effective websites for parishes and other organizations, ensuring our badging system works smoothly, and helping as needed.

Other work has included

- launching support for the additional "Thou/Thy" version of liturgical texts,
- participating in a Department of Christian Service and Humanitarian Aid meeting to advise them on strategies to better gear their rich Resource Handbook toward online exposure, and
- responding to two different classes of attack that were affecting our servers.

Respectfully submitted,

Ryan Platte, Technical Manager

Proposal for "The Orthodox Church Journal 2015"

In light of the forthcoming 18th All-American Council, it is being proposed that what initially had been envisioned as an annual "year-in-review" publication be broadened into a 24- or 36-page "journal" highlighting the theme of the Council -- "How To Expand The Mission" for distribution before, at and after the AAC.

The journal will be organized into four broad sections detailing where we as the Church in North America have been, where we find ourselves today, and where we hope to be in the future -- a "past, present and future" schematic. The initial entry in the journal will consist of a message by His Beatitude, Metropolitan Tikhon. Subsequent sections will include the following.

I: PLANTING THE MISSION. This section will trace the "roots" of the Church in America and its mission from the arrival of the missionaries in 1794 through the move of the Church's headquarters from Sitka to San Francisco and subsequently New York.

II: NURTURING THE MISSION. This section will relate the period that begins with the consequences of the Russian Revolution for the Church in North America through the granting of autocephaly in 1970.

III: MAINTAINING THE MISSION. This section will trace the issues facing the Church from the granting of autocephaly to the present day.

IV: EXPANDING THE MISSION. This final section will offer a variety of considerations on where the Church is "going" in the immediate future.

In addition to a concise running narrative, other resources and features -- quotes from past AAC study papers on Stewardship, Mission, Church Growth and Evangelization; quotes from early North American Church pioneers related to "The Mission;" highlights of past All-American *Sobors* and Councils; etc. -- will be highlighted. Appropriate illustrations, photographs and other mementos will round out the volume.

If it be your pleasure, I will oversee the general editing and production of the publication, the coordination of writing assignments and authors, layout and presentation, and technical production and interfacing with the printer.

It is proposed that said publication would be distributed to all AAC participants, while bulk mailings for general distribution in all parishes would take place in conjunction with the AAC's opening. [Each parish will receive a pre-determined number of copies for distribution, in a manner similar to the bulk distribution of "The Orthodox Church" magazine.]

The "draft" of the publication will be ready by mid-May 2015. Printing will take place in early June, well before the AAC convenes. [Given delivery times, it is best to mail the bulk packets to parishes at the end of June, since deliveries can vary from one to several weeks depending on local post offices, as we know quite well from similar mailings of TOC in years past.]

Finally, any and all suggestions and recommendations with regard to content will be gratefully appreciated and may be sent to me directly at tocmed@hotmail.com and/or info@oca.org.

Respectfully submitted,
Archpriest John Matusiak
OCA web editor

**Orthodox Church in America
Treasurer's Report
February 2015**

Your Beatitude, Your Eminences, Your Graces, Reverend Fathers, and members of the Metropolitan Council:

This report presents the preliminary internal financial results for the year ended December 31, 2014, an update on the "Stewards of the OCA", a recap of Travel Expenses for 2014, and an update on various gifts and bequests.

Financial Results for the year ended December 31, 2014 (Exhibits A & B):

Preliminary 2014 Financial Results (Exhibits A & B)

Exhibit A – Comparative Balance Sheets: Our balance sheet as of December 31, 2014 shows:

- Total assets of \$3,211,503
- Total liabilities of \$627,244 (including deferred AAC revenue of \$280,763)
- Net Assets of \$2,584,259
- Total cash is \$979,293, of which \$104,202 is unrestricted.
- Assessments Receivable of \$327K include December assessments of \$75.6K (all received in January) and AAC assessments of \$250K due in Q1 2015.
- Bequest Receivable includes \$491K from the Weigel estate and the balance of \$68K from the Morse Missions bequest.
- Prepaid Expenses of \$47K include 2015 Blackbaud maintenance fee(\$11K), postage machine lease(\$3.4K) and Iconostas for the AAC \$32K.
- Liabilities include \$75K in payables and accrued expenses, \$21K due to the Diocese of the South on the Metropolitan JONAH loan, \$1984 in annuity liabilities, \$42K in retirement obligation to Mat Glagolev, and deferred AAC Revenue of \$280K.
- Our net assets at the beginning of the year were \$2,551,509, and with the net surplus for the year of \$32,750, the balance at December 31, 2014 is \$2,584,259.

Exhibit B – Detailed Actual versus Budget

The 2014 budget projected a net Deficit across all funds of \$103,325. Our actual result was a surplus of \$32,753, for a positive variance of \$136,078. Exhibit B-1 is a one-page Recap of the activity for the year. Exhibit B-2 presents the details by department for 2014.

Highlights of the results are as follows:

Unrestricted Funds:

- Revenues – Total revenues were under budget by \$7,574 due mainly to a decrease in general contributions.
- Expenses – Total expenses were under budget by \$155,860, with the bulk of this in the Administrative area due to lower Legal fees (\$81K) and lower salaries & benefits (\$32K). Other departments' variances were as follows:
 - Executive Expense was over budget by \$12K due to higher medical premiums on Met JONAH's insurance.
 - Holy Synod was over by \$13K all in the travel category.
 - Metropolitan Council expenses were under-budget by \$9.4K due to the change in venue to the Seminary.
 - Property Support was over budget by \$30K due to grounds upkeep (\$11K), Town Service fees (\$3K), Depreciation (\$3K) and Insurance (\$6.6K).
 - Communications and TOC was under budget by \$7.5K due to no additions of the TOC being printed.
 - External Affairs was over budget by \$3.5 due to travel and telephone expenses.
 - Other Special Commissions:
 - ORSMA – Expenses of \$86K were under budget by \$29K.
 - Strategic Planning, which includes the Office of Continuing Education, was under budget by \$56K.
 - Psychological Testing was under budget by \$16K.
 - Total Operating Results were a surplus of \$238,664 vs budget of \$90,377.
- Stewards of the OCA:
 - Revenues of \$41,209 include:
 - \$32K in Stewards donations;
 - \$8,825 in DVP and Liturgical Music Program fees.
 - Total revenues were under budget by \$7,714.
 - Expenses of \$107,336 were under budget by \$34,814 and include the following:
 - Conference and general expenses of \$1,048;
 - Departmental expenses of \$106,288.
- Net Operating Surplus of \$172,537 vs budget of \$(2,850).

Restricted Funds:

- Temporarily Restricted Funds: Total revenues were \$25,469. Expenses of \$173,020 included the required annuity payments, \$109,167 in Mission Planting Grants and \$9,780 in distributions to the Seminaries.
- Permanently Restricted Funds: We had revenues of \$12,664 and distributions of \$4,897 for a net surplus of \$7,767.

Stewards of the OCA:

For 2014 we had 66 stewards contributing a total of \$32,384 as compared with \$60,585 for 2013.

Other Gifts and Bequests:

In addition to the Stewards appeal, we received numerous other gifts for general purposes as well as gifts earmarked for other areas such as Charity, Seminaries, Church Planting Grants, Main Endowment, Clergy Care and Youth Dept Peter the Aleut Grant. **Exhibit C** includes a list of all of these other donations.

4rd Annual Chancellors/Treasurers Meeting:

The 4th annual Chancellors/Treasurers Meeting was scheduled to be held in Syosset on January 27, 2015. However, due to the winter storm this meeting was postponed until February 3rd. I will report on this meeting when we meet on February 10-12.

Respectfully submitted,

Melanie Ringa

Melanie Ringa

Treasurer

The Orthodox Church in America
 Condensed Balance Sheet
 For the Years 2005 - 2014

EXHIBIT A

Audit in
 Progress

AUDITED

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
ASSETS										
Cash	\$ 95,289	\$ 680,637	\$ 679,697	\$ 430,904	\$ 360,761	\$ 464,805	\$ 744,298	\$ 939,806	\$ 930,189	\$ 979,293
Accounts, Notes & Bequests Receivable	\$ 59,306	\$ 95,056	\$ 308,644	\$ 88,476	\$ 117,501	\$ 150,051	\$ 1,092,481	\$ 765,795	\$ 685,082	\$ 859,296
Prepaid and Inventory	\$ 40,668	\$ 113,187	\$ 28,877	\$ 23,708	\$ 6,677	\$ 13,017	\$ 16,235	\$ 14,742	\$ 23,027	\$ 47,332
Investments	\$ 2,741,333	\$ 2,941,212	\$ 2,784,831	\$ 1,640,669	\$ 1,446,382	\$ 1,378,305	\$ 1,189,570	\$ 1,129,770	\$ 1,053,629	\$ 1,060,574
Land, building and equipment	\$ 880,458	\$ 761,615	\$ 416,638	\$ 396,942	\$ 344,491	\$ 319,387	\$ 323,922	\$ 246,271	\$ 259,762	\$ 265,008
Total Assets	\$ 3,817,054	\$ 4,591,707	\$ 4,218,687	\$ 2,580,699	\$ 2,275,812	\$ 2,325,565	\$ 3,366,506	\$ 3,096,384	\$ 2,951,689	\$ 3,211,503

LIABILITIES										
Accounts payable and accrued expenses	\$ 490,587	\$ 207,452	\$ 218,019	\$ 193,360	\$ 355,380	\$ 96,221	\$ 154,935	\$ 121,201	\$ 215,859	\$ 162,160
Loans Payable	\$ 917,525	\$ 1,727,026	\$ 1,096,892	\$ 1,015,761	\$ 912,168	\$ 789,373	\$ 684,212	\$ 59,616	\$ -	\$ -
Deferred Revenue	\$ 188,300	\$ 151,863	\$ 66,158	\$ -	\$ -	\$ -	\$ 25,568	\$ -	\$ -	\$ 280,763
Annuity & unitrust agreements	\$ 478,507	\$ 521,213	\$ 830,579	\$ 624,254	\$ 537,758	\$ 456,329	\$ 368,116	\$ 286,014	\$ 184,321	\$ 184,321
Total Liabilities	\$ 2,074,919	\$ 2,607,554	\$ 2,211,648	\$ 1,833,375	\$ 1,805,306	\$ 1,341,923	\$ 1,232,831	\$ 466,831	\$ 400,180	\$ 627,244
NET ASSETS	\$ 1,742,135	\$ 1,984,153	\$ 2,007,039	\$ 747,324	\$ 470,506	\$ 983,642	\$ 2,133,675	\$ 2,629,553	\$ 2,551,509	\$ 2,584,259 (1)
Total Liabilities and Net Assets	\$ 3,817,054	\$ 4,591,707	\$ 4,218,687	\$ 2,580,699	\$ 2,275,812	\$ 2,325,565	\$ 3,366,506	\$ 3,096,384	\$ 2,951,689	\$ 3,211,503

(1) Unrestricted Net Assets	\$ 25,888	\$ 127,627
Temporarily Restricted Net Assets	\$ 1,502,372	\$ 1,427,232
Permanently Restricted Net Assets	\$ 1,023,249	\$ 1,029,400
	\$ 2,551,509	\$ 2,584,259

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2014 and December 31, 2013

EXHIBIT A

	December 31, 2014	December 31, 2013
ASSETS		
Current Assets		
<i>Unrestricted</i>		
Commerce Checking- Operating	\$ 57,020.00	\$ 18,037.00
Commerce Bank- Payroll	\$ 11,098.00	\$ 6,116.00
Astoria Bank- St.Sergius Chapel	\$ 18,920.00	\$ 22,687.00
Honesdale Bank Checking	\$ 15,701.00	\$ 15,701.00
Petty Cash- Chancery Office	\$ 1,463.00	\$ 1,219.00
	\$ 104,202.00	\$ 63,760.00
<i>Temporarily Restricted</i>		
Commerce Bank- All American Council	\$ 51,374.00	\$ 1,609.00
Commerce Bank - Restricted	\$ 40,260.00	\$ 84,261.00
Commerce Bank- Reserved	\$ 39,384.00	\$ 39,366.00
Honesdale Bank Money Market	\$ 744,073.00	\$ 741,193.00
	\$ 875,091.00	\$ 866,429.00
Total Cash	\$ 979,293.00	\$ 930,189.00
Accounts Receivable		
Assessments Receivable	\$ 327,209.00	\$ 146,946.00
Pledges Receivable	\$ -	\$ -
Desk Calendar Receivable	\$ -	\$ -
Total Accounts Receivable	\$ 327,209.00	\$ 146,946.00
Other Current Assets		
Bequest Receivable	\$ 525,025.00	\$ 525,025.00
Due from OCA Pension Dept	\$ 7,062.00	\$ 13,111.00
Prepaid Expense	\$ 47,332.00	\$ 23,027.00
Other	\$ -	\$ -
Total Other Current Assets	\$ 579,419.00	\$ 561,163.00
Total Current Assets	\$ 1,885,921.00	\$ 1,638,298.00
Fixed Assets		
Plant Fund - Real Estate	\$ 45,000.00	\$ 45,000.00
Plant Fund Building & Improve	\$ 531,783.00	\$ 531,783.00
Plant Fund Furniture & Equip	\$ 50,847.00	\$ 50,847.00
Plant Fund Auto & Garden Equip	\$ 96,171.00	\$ 64,423.00
Plant Fund Computer Equip	\$ 334,224.00	\$ 328,206.00
Plant Fund Software	\$ 33,000.00	\$ 33,000.00
Plant Fund Chapel Equip & Furn	\$ 25,000.00	\$ 25,000.00
Plant Fund Capitalized Closing	\$ 87,682.00	\$ 87,682.00
Accum Deprec Bld & Improvements	\$ (341,592.00)	\$ (328,297.00)
Accum Deprec Furn & Equip	\$ (50,847.00)	\$ (50,847.00)
Accum Deprec Auto & Garden Equi	\$ (75,006.00)	\$ (64,423.00)
Accum Deprec Computer Equip	\$ (325,572.00)	\$ (319,930.00)
Accum Deprec Computer Software	\$ (33,000.00)	\$ (30,000.00)

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2014 and December 31, 2013

EXHIBIT A

	December 31, 2014	December 31, 2013
Accum Deprec Chapel Equip & Fur	\$ (25,000.00)	\$ (25,000.00)
Accum Amort Capital Close Cost	\$ (87,682.00)	\$ (87,682.00)
Total Fixed Assets	\$ 265,008.00	\$ 259,762.00
 Restricted Investments and Trusts		
Fellowship of Orthodox Stewards	\$ 68,924.00	\$ 68,543.00
A & B York Trust	\$ -	\$ -
J McGuire Trust	\$ 209,563.00	\$ 209,085.00
Kavalenko Nimcrut	\$ 78,250.00	\$ 79,005.00
St. Andrew's	\$ 103,310.00	\$ 102,679.00
Honesdale Main Endowment	\$ 477,396.00	\$ 472,611.00
HVIZD Annuity	\$ 93,032.00	\$ 93,032.00
Wells Fargo - Quasi Restricted Bequests	\$ 30,099.00	\$ 28,674.00
 Total Restricted Investments and Trusts	 \$ 1,060,574.00	 \$ 1,053,629.00
 TOTAL ASSETS	 \$ 3,211,503.00	 \$ 2,951,689.00
 LIABILITIES & EQUITY		
Current Liabilities		
Accounts payable and accrued Expenses	\$ 75,809.00	\$ 123,978.00
Deferred Revenue	\$ 280,763.00	\$ -
Auto loan - Chase Auto Finance	\$ 22,048.00	\$ -
Accrued endowment distributions	\$ -	\$ 1,778.00
Retirement Obligation	\$ 42,778.00	\$ 54,178.00
Other (Loan Payable to Diocese of the South)	\$ 21,525.00	\$ 35,925.00
Current portion of Long term debt	\$ -	\$ -
Total Current Liabilities	\$ 442,923.00	\$ 215,859.00
 Long Term Liabilities		
Deferred Compensation and Annuities	\$ -	\$ -
Hvizd Annuity liability	\$ 83,315.00	\$ 83,315.00
Unitrust liability	\$ 101,006.00	\$ 101,006.00
York trust liability	\$ -	\$ -
Total Deferred compensation and annuities	\$ 184,321.00	\$ 184,321.00
 Total Liabilities	 \$ 627,244.00	 \$ 400,180.00
 Equity		
Unrestricted Net Assets, 12/31/11	\$ (705,117.00)	\$ (705,117.00)
Temporarily Restricted Net Assets, 12/31/11	\$ 1,818,363.00	\$ 1,818,363.00
Permanently Restricted Net Assets, 12/31/11	\$ 1,020,429.00	\$ 1,020,429.00
Total Net Assets	\$ 2,133,675.00	\$ 2,133,675.00
Current Year Activity - 2014	\$ 32,750.00	\$ -
Current Year Activity - 2013	\$ (54,794.00)	\$ (54,794.00)
Current Year Activity - 2012	\$ 472,628.00	\$ 472,628.00

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2014 and December 31, 2013

EXHIBIT A

	December 31, 2014	December 31, 2013
Total Net Assets	2,584,259.00	2,551,509.00
Total Equity	\$ 2,584,259.00	\$ 2,551,509.00
 TOTAL LIABILITIES & EQUITY	\$ 3,211,503.00	\$ 2,951,689.00
	\$ -	\$ -
Unrestricted Surplus/(Deficit) - 2012	\$ 783,039.00	\$ 783,039.00
Temp Restricted Surplus/(Deficit)	\$ (311,942.00)	\$ (311,942.00)
Perm Restricted Surplus/(Deficit)	\$ 1,531.00	\$ 1,531.00
	\$ 472,628.00	\$ 472,628.00
Unrestricted Surplus/(Deficit) - 2013	\$ (52,031.00)	\$ (52,031.00)
Temp Restricted Surplus/(Deficit)	\$ (4,049.00)	\$ (4,049.00)
Perm Restricted Surplus/(Deficit)	\$ 1,289.00	\$ 1,289.00
	\$ (54,791.00)	\$ (54,791.00)
Unrestricted Surplus/(Deficit) - 2014	\$ 172,537.00	\$ -
Temp Restricted Surplus/(Deficit)	\$ (147,551.00)	\$ -
Perm Restricted Surplus/(Deficit)	\$ 7,764.00	\$ -
	\$ 32,750.00	\$ -

The Orthodox Church in America
Condensed Statements of Activities
For the Years 2007 - 2014

EXHIBIT B

AUDITED

Audit in
Progress
2014

	2007	2008	2009	2010	2011	2012	2013	2014
Operating Revenues:								
Contributions	\$ 188,899	\$ 63,694	\$ 121,089	\$ 67,389	\$ 11,491	\$ 463,682	\$ 127,572	\$ 58,355
Assessments	\$ 2,630,530	\$ 2,538,076	\$ 2,447,061	\$ 2,400,989	\$ 2,304,772	\$ 2,281,079	\$ 2,001,762	\$ 1,957,962
Other	\$ 238,366	\$ 100,375	\$ 43,407	\$ 37,017	\$ 20,927	\$ 5,448	\$ 68,585	\$ 25,660
Release from Temporarily Restricted	\$ 278,362	\$ 479,896	\$ 174,258	\$ 61,801	\$ 320,830	\$ 192,804	\$ 129,825	\$ -
Total Operating Revenues	\$ 3,336,157	\$ 3,182,041	\$ 2,785,815	\$ 2,567,196	\$ 2,658,020	\$ 2,943,013	\$ 2,327,744	\$ 2,041,977
Operating Expenses:								
General Administration	\$ 2,457,890	\$ 2,650,071	\$ 2,010,626	\$ 1,657,114	\$ 1,788,555	\$ 1,767,710	\$ 1,989,449	\$ 1,656,811
Departmental Ministries	\$ 183,075	\$ 182,843	\$ 57,546	\$ 90,751	\$ 100,985	\$ 74,634	\$ 183,511	\$ 107,336
All American Council	\$ -	\$ 243,171	\$ -	\$ -	\$ 313,415	\$ 68,761	\$ -	\$ -
Depreciation & Amortization	\$ 86,427	\$ 59,082	\$ 52,550	\$ 33,463	\$ 25,465	\$ 90,877	\$ 28,433	\$ 32,521
Net Investment Income/Loss	\$ (21,401)	\$ 238,912	\$ (3,731)	\$ (2,536)	\$ (1,452)	\$ (13,966)	\$ (21,912)	\$ -
Professional Fees-Legal	\$ 100,225	\$ 220,017	\$ 453,627	\$ 143,356	\$ 139,489	\$ 158,829	\$ 155,367	\$ 24,310
Legal Settlement	\$ -	\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Fees-Audit	\$ 80,078	\$ 116,504	\$ 60,986	\$ 50,800	\$ 49,920	\$ 40,600	\$ 38,200	\$ 34,000
Professional Fees-Consulting	\$ 136,149	\$ 219,739	\$ 116,034	\$ 85,863	\$ 103,300	\$ 172,519	\$ 6,727	\$ 14,463
Total Operating Expenses	\$ 3,022,443	\$ 3,930,339	\$ 2,997,638	\$ 2,058,811	\$ 2,519,677	\$ 2,359,964	\$ 2,379,775	\$ 1,869,441
Net Surplus/(Deficit) from Operations	\$ 313,714	\$ (748,298)	\$ (211,823)	\$ 508,385	\$ 138,343	\$ 583,049	\$ (52,031)	\$ 172,536
Temporarily & Permanently Restricted Revenues:								
Contributions	\$ 239,188	\$ 153,898	\$ 112,771	\$ 67,533	\$ 1,014,432	\$ 30,086	\$ 122,204	\$ 38,134
Assessments	\$ -	\$ 243,171	\$ 6,649	\$ -	\$ 313,415	\$ 68,761	\$ -	\$ -
Investment Income/(loss)	\$ 104,876	\$ (428,590)	\$ (10,157)	\$ (982)	\$ 4,674	\$ 6,786	\$ 4,861	\$ (177,917)
Disbursements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Release to Operating Revenues	\$ (278,362)	\$ (479,896)	\$ (174,258)	\$ (61,801)	\$ (320,830)	\$ (192,804)	\$ (129,825)	\$ -
Net Change in Temp&Perm Restricted Funds	\$ 65,702	\$ (511,417)	\$ (64,995)	\$ 4,750	\$ 1,011,691	\$ (87,171)	\$ (2,760)	\$ (139,783)
Total Change in Net Assets	\$ 379,416	\$ (1,259,715)	\$ (276,818)	\$ 513,135	\$ 1,150,034	\$ 495,878	\$ (54,791)	\$ 32,753

Orthodox Church in America								EXHIBIT B - 1	
Statement of Activities vs Budget- RECAP BY DEPARTMENT									
For the Year ended 12/31/14									
	FINAL Budget 2014	Actual Q1 2014	Actual Q2 2014	Actual Q3 2014	Actual Q4 2014	Actual 12/31/2014	Budget 12/31/2014	Variance to Budget	
Unrestricted Funds:									
Assessments	\$ 1,905,742	\$ 480,203	\$ 493,944	\$ 493,089	\$ 490,726	\$ 1,957,962	\$ 1,905,742	\$ 52,220	
Contributions	\$ 10,000	\$ 140	\$ 870	\$ 2,280	\$ 600	\$ 3,890	\$ 10,000	\$ (6,110)	
Chapel	\$ 12,000	\$ 1,825	\$ 4,554	\$ 3,036	\$ 3,841	\$ 13,256	\$ 12,000	\$ 1,256	
Continuing Education Workshop Revenue	\$ 75,000	\$ -	\$ -	\$ 3,150	\$ 16,800	\$ 19,950	\$ 75,000	\$ (55,050)	
Other	\$ 5,600	\$ 2,089	\$ 2,015	\$ 280	\$ 1,326	\$ 5,710	\$ 5,600	\$ 110	
Total Revenues	\$ 2,008,342	\$ 484,257	\$ 501,383	\$ 501,835	\$ 513,293	\$ 2,000,768	\$ 2,008,342	\$ (7,574)	
Expenses:									
Executive Offices	\$ 450,007	\$ 110,170	\$ 117,156	\$ 114,057	\$ 120,775	\$ 462,158	\$ 450,007	\$ 12,151	
Administration	\$ 482,441	\$ 119,597	\$ 99,490	\$ 79,818	\$ 85,079	\$ 383,984	\$ 482,441	\$ (98,457)	
Metropolitan Expenses	\$ 63,345	\$ 8,877	\$ 14,654	\$ 16,646	\$ 18,668	\$ 58,845	\$ 63,345	\$ (4,500)	
Holy Synod	\$ 74,400	\$ 27,248	\$ 24,654	\$ 12,817	\$ 22,787	\$ 87,506	\$ 74,400	\$ 13,106	
Metropolitan Council	\$ 41,330	\$ 14,977	\$ -	\$ 15,636	\$ 1,265	\$ 31,878	\$ 41,330	\$ (9,452)	
Property Support	\$ 233,679	\$ 66,681	\$ 51,953	\$ 64,132	\$ 81,214	\$ 263,980	\$ 233,679	\$ 30,301	
Communications/TOC	\$ 103,735	\$ 16,829	\$ 27,542	\$ 26,107	\$ 25,716	\$ 96,194	\$ 103,735	\$ (7,541)	
External Affairs/ St Catherine's	\$ 127,901	\$ 31,599	\$ 30,243	\$ 32,822	\$ 36,807	\$ 131,471	\$ 127,901	\$ 3,570	
Archives	\$ 96,786	\$ 25,203	\$ 25,068	\$ 25,139	\$ 28,090	\$ 103,500	\$ 96,786	\$ 6,714	
St Sergius Chapel	\$ 14,850	\$ 2,839	\$ 4,585	\$ 4,311	\$ 4,005	\$ 15,740	\$ 14,850	\$ 890	
Ordination Candidate Testing	\$ 38,000	\$ 4,187	\$ 8,395	\$ 1,575	\$ 7,435	\$ 21,592	\$ 38,000	\$ (16,408)	
Office of Policy on Sexual Misconduct	\$ 116,491	\$ 21,269	\$ 22,553	\$ 19,428	\$ 23,557	\$ 86,807	\$ 116,491	\$ (29,684)	
Strategic Planning-Continuing Education	\$ 75,000	\$ -	\$ -	\$ -	\$ 18,450	\$ 18,450	\$ 75,000	\$ (56,550)	
Total Operating Expenses	\$ 1,917,965	\$ 449,476	\$ 426,293	\$ 412,488	\$ 473,848	\$ 1,762,105	\$ 1,917,965	\$ (155,860)	
Net Operating Surplus(Deficit)	\$ 90,377	\$ 34,781	\$ 75,090	\$ 89,347	\$ 39,445	\$ 238,663	\$ 90,377	\$ 148,286	
"Stewards of the Orthodox Church" and Departmental Ministries:									
Revenue (Appeals & DVP Program)	\$ 48,923	\$ 20,548	\$ 7,101	\$ 6,605	\$ 6,955	\$ 41,209	\$ 48,923	\$ (7,714)	
Expenses:									
Administrative Expenses	\$ -	\$ 1,048	\$ -	\$ -	\$ -	\$ 1,048	\$ -	\$ 1,048	
Institutional Chaplaincy	\$ 12,275	\$ 1,642	\$ 1,500	\$ 1,802	\$ 1,900	\$ 6,844	\$ 12,275	\$ (5,431)	
Evangelization	\$ 35,625	\$ 1,500	\$ 4,097	\$ 1,750	\$ 3,238	\$ 10,585	\$ 35,625	\$ (25,040)	
Liturgical Music	\$ 14,700	\$ 2,561	\$ 2,532	\$ 4,430	\$ 3,404	\$ 12,927	\$ 14,700	\$ (1,773)	
Christian Education	\$ 10,200	\$ 2,096	\$ 3,385	\$ 3,757	\$ 8,645	\$ 17,883	\$ 10,200	\$ 7,683	
Youth and Young Adults	\$ 38,500	\$ 5,606	\$ 11,341	\$ 7,182	\$ 10,599	\$ 34,728	\$ 38,500	\$ (3,772)	
Diaconal Vocations	\$ 18,475	\$ 3,000	\$ 3,235	\$ 3,001	\$ 3,000	\$ 12,236	\$ 18,475	\$ (6,239)	
Christian Service/Humanitarian Aid	\$ 12,375	\$ 1,500	\$ 2,126	\$ 1,500	\$ 5,959	\$ 11,085	\$ 12,375	\$ (1,290)	
Total Expenses	\$ 142,150	\$ 18,953	\$ 28,216	\$ 23,422	\$ 36,745	\$ 107,336	\$ 142,150	\$ (34,814)	
Net SOCA/Departmental Costs	\$ (93,227)	\$ 1,595	\$ (21,115)	\$ (16,817)	\$ (29,790)	\$ (66,127)	\$ (93,227)	\$ 27,100	
Net Operating Income	\$ (2,850)	\$ 36,376	\$ 53,975	\$ 72,530	\$ 9,655	\$ 172,536	\$ (2,850)	\$ 175,386	
Net Operating Income (GAAP Basis)	\$ (2,850)	\$ 36,376	\$ 53,975	\$ 72,530	\$ 9,655	\$ 172,536	\$ (2,850)	\$ 175,386	
Temporarily Restricted:									
Revenues	\$ 20,000	\$ 5,332	\$ 2,470	\$ 31,325	\$ (13,657)	\$ 25,470	\$ 20,000	\$ 5,470	
Expenses	\$ (121,000)	\$ (35,415)	\$ (35,579)	\$ (43,273)	\$ (58,753)	\$ (173,020)	\$ (121,000)	\$ (52,020)	
Net Surplus/(Deficit)	\$ (101,000)	\$ (30,083)	\$ (33,109)	\$ (11,948)	\$ (72,410)	\$ (147,550)	\$ (101,000)	\$ (46,550)	
Permanently Restricted:									
Revenues	\$ 5,000	\$ 3,698	\$ 4,266	\$ 1,430	\$ 3,270	\$ 12,664	\$ 5,000	\$ 7,664	
Expenses	\$ (4,475)	\$ (913)	\$ (2,050)	\$ (280)	\$ (1,654)	\$ (4,897)	\$ (4,475)	\$ (422)	
Net Surplus/(Deficit)	\$ 525	\$ 2,785	\$ 2,216	\$ 1,150	\$ 1,616	\$ 7,767	\$ 525	\$ 7,242	
Total Change in Net Assets	\$ (103,325)	\$ 9,078	\$ 23,082	\$ 61,732	\$ (61,139)	\$ 32,753	\$ (103,325)	\$ 136,078	

**Orthodox Church in America
Statement of Activities vs Budget
For the Year ended 12/31/14**

EXHIBIT B-2

	FINAL Budget 2014	Actual Q1 2014	Actual Q2 2014	Actual Q3 2014	Actual Q-4 2014	Actual Thru 12/31/2014	Variance to Budget	2013 Actual	2014 vs 2013
Unrestricted Funds:									
REVENUES									
Diocesan Assessments	\$ 1,905,742	\$ 480,203	\$ 493,944	\$ 493,089	\$ 490,726	\$ 1,957,962	\$ 52,220	\$ 2,001,762	\$ (43,800)
Contributions	\$ 10,000	\$ 140	\$ 870	\$ 2,280	\$ 600	\$ 3,890	\$ (6,110)	\$ 104,453	\$ (100,563)
St. Sergius Chapel	\$ 12,000	\$ 1,825	\$ 4,554	\$ 3,036	\$ 3,841	\$ 13,256	\$ 1,256	\$ 12,015	\$ 1,241
Investment Income	\$ 2,500	\$ 221	\$ 2,015	\$ 281	\$ 831	\$ 3,348	\$ 848	\$ 4,884	\$ (1,536)
Enthronement Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 31,675	\$ (31,675)
Continuing Education Revenues	\$ 75,000	\$ -	\$ -	\$ 3,150	\$ 16,800	\$ 19,950	\$ (55,050)	\$ -	\$ 19,950
Other (Yearbook/Desktop Calendar/OCPD Royalty)	\$ 3,100	\$ 1,868	\$ -	\$ -	\$ 495	\$ 2,363	\$ (737)	\$ 8,996	\$ (6,633)
TOTAL REVENUES	\$ 2,008,342	\$ 484,257	\$ 501,383	\$ 501,836	\$ 513,293	\$ 2,000,769	\$ (7,573)	\$ 2,163,785	\$ (163,016)
EXPENSES									
Executive Offices									
Salaries	\$ 304,993	\$ 76,248	\$ 76,248	\$ 76,248	\$ 76,248	\$ 304,992	\$ (1)	\$ 329,521	\$ (24,529)
Clergy Housing	\$ 41,216	\$ 10,304	\$ 10,304	\$ 10,304	\$ 10,304	\$ 41,216	\$ (0)	\$ 41,216	\$ -
Payroll Taxes	\$ 3,912	\$ 2,862	\$ 1,200	\$ 978	\$ 978	\$ 6,018	\$ 2,106	\$ 4,118	\$ 1,900
Benefits(Medical, Unemployment, Pension)	\$ 99,886	\$ 20,756	\$ 29,404	\$ 26,527	\$ 33,245	\$ 109,932	\$ 10,046	\$ 93,925	\$ 16,007
	\$ 450,007	\$ 110,170	\$ 117,156	\$ 114,057	\$ 120,775	\$ 462,158	\$ 12,151	\$ 468,780	\$ (6,622)
Administrative Offices									
Salaries	\$ 143,813	\$ 20,791	\$ 27,740	\$ 34,209	\$ 28,779	\$ 111,519	\$ (32,294)	\$ 139,813	\$ (28,294)
Payroll Taxes	\$ 11,002	\$ 643	\$ 1,960	\$ 2,178	\$ 1,972	\$ 6,753	\$ (4,249)	\$ 9,904	\$ (3,151)
Benefits(Medical, Unemployment, Pension)	\$ 46,521	\$ 12,396	\$ 13,387	\$ 13,222	\$ 11,119	\$ 50,124	\$ 3,603	\$ 68,436	\$ (18,312)
Legal	\$ 105,000	\$ 18,599	\$ 4,755	\$ 932	\$ 24	\$ 24,310	\$ (80,690)	\$ 155,367	\$ (131,057)
Outside contractors	\$ 15,500	\$ 5,780	\$ 2,951	\$ 2,951	\$ 2,951	\$ 14,633	\$ (867)	\$ 6,727	\$ 7,906
Mortgage interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,285	\$ (1,285)
Accounting/Audit	\$ 35,000	\$ 15,600	\$ 15,600	\$ -	\$ 2,800	\$ 34,000	\$ (1,000)	\$ 38,200	\$ (4,200)
Travel & meetings - central admin	\$ 17,592	\$ 16,738	\$ 2,632	\$ 4,871	\$ 6,540	\$ 30,781	\$ 13,189	\$ 29,871	\$ 910
Telephone	\$ 16,300	\$ 4,534	\$ 4,210	\$ 3,461	\$ 3,683	\$ 15,888	\$ (412)	\$ 17,892	\$ (2,004)
Equipment leasing	\$ 21,867	\$ 5,439	\$ 8,755	\$ 5,467	\$ 2,465	\$ 22,126	\$ 259	\$ 21,838	\$ 288
Postage, mailing services	\$ 6,000	\$ 2,367	\$ 2,135	\$ (266)	\$ 2,682	\$ 6,918	\$ 918	\$ 5,785	\$ 1,133
Computer expense	\$ 12,000	\$ 3,223	\$ 1,089	\$ 1,930	\$ 6,124	\$ 12,366	\$ 366	\$ 6,511	\$ 5,855
Stipends	\$ 23,400	\$ 5,850	\$ 5,850	\$ 2,750	\$ 5,050	\$ 19,500	\$ (3,900)	\$ 11,400	\$ 8,100
Office Supplies	\$ 6,000	\$ 903	\$ 828	\$ 1,038	\$ 5,210	\$ 7,979	\$ 1,979	\$ 11,801	\$ (3,822)
Food	\$ 3,400	\$ 1,274	\$ 1,318	\$ 2,180	\$ 728	\$ 5,500	\$ 2,100	\$ 6,311	\$ (811)
Other administrative expenses(inc Auto)	\$ 7,900	\$ 3,323	\$ 1,381	\$ 3,574	\$ 2,947	\$ 11,225	\$ 3,325	\$ 16,945	\$ (5,720)
Amortization expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,076	\$ (3,076)
Insurance - D&O	\$ 3,541	\$ -	\$ 3,541	\$ -	\$ -	\$ 3,541	\$ -	\$ 3,541	\$ -
Payroll processing fees	\$ 3,600	\$ 885	\$ 702	\$ 474	\$ 815	\$ 2,876	\$ (724)	\$ 3,207	\$ (331)
Bank fees, registration fees	\$ 4,005	\$ 1,252	\$ 656	\$ 379	\$ 1,190	\$ 3,477	\$ (528)	\$ 7,508	\$ (4,031)
Books, subscriptions, dues & other	\$ -	\$ -	\$ -	\$ 468	\$ -	\$ 468	\$ 468	\$ 6,466	\$ (5,998)
Total Administrative Offices	\$ 482,441	\$ 119,597	\$ 99,490	\$ 79,818	\$ 85,079	\$ 383,984	\$ (98,457)	\$ 571,884	\$ (187,900)
Metropolitan Expenses									
Metropolitan Travel	\$ 41,050	\$ 5,890	\$ 10,978	\$ 14,467	\$ 14,874	\$ 46,209	\$ 5,159	\$ 35,554	\$ 10,655
Office expense	\$ 10,295	\$ 1,287	\$ 1,626	\$ 679	\$ 1,464	\$ 5,056	\$ (5,239)	\$ 4,676	\$ 380
Office of Military Chaplaincy - Stipends	\$ 6,000	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 6,000	\$ -	\$ 6,000	\$ -
Office of Military Chaplaincy - Expenses	\$ 6,000	\$ 200	\$ 550	\$ -	\$ 830	\$ 1,580	\$ (4,420)	\$ 2,284	\$ (704)
Total Metropolitan Expenses	\$ 63,345	\$ 8,877	\$ 14,654	\$ 16,646	\$ 18,668	\$ 58,845	\$ (4,500)	\$ 48,514	\$ 10,331
Holy Synod									
Travel	\$ 34,500	\$ 17,035	\$ 15,044	\$ 12,217	\$ 16,157	\$ 60,453	\$ 25,953	\$ 30,484	\$ 29,969
Office expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 670	\$ (670)
Special Episcopal Stipends	\$ 14,400	\$ 3,600	\$ 3,600	\$ 3,600	\$ 1,800	\$ 12,600	\$ (1,800)	\$ 21,400	\$ (8,000)
Food	\$ 1,500	\$ 613	\$ 10	\$ -	\$ 30	\$ 653	\$ (847)	\$ 9,650	\$ (8,997)
Legal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Office supplies, Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 41	\$ (41)
Episcopal Salary/Benefits	\$ 24,000	\$ 6,000	\$ 6,000	\$ (3,000)	\$ 4,800	\$ 13,800	\$ (10,200)	\$ 53,326	\$ (39,526)
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Holy Synod	\$ 74,400	\$ 27,248	\$ 24,654	\$ 12,817	\$ 22,787	\$ 87,506	\$ 13,106	\$ 115,571	\$ (28,065)
Metropolitan Council									
Travel and Meetings - MC	\$ 40,000	\$ 14,977	\$ -	\$ 15,636	\$ 1,265	\$ 31,878	\$ (8,122)	\$ 41,071	\$ (9,193)
Internal Audit - Travel, Lodging and Meals, Supplies	\$ 1,330	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,330)	\$ 1,153	\$ (1,153)
	\$ 41,330	\$ 14,977	\$ -	\$ 15,636	\$ 1,265	\$ 31,878	\$ (9,452)	\$ 42,224	\$ (10,346)
Property Support									
Salaries	\$ 46,350	\$ 11,588	\$ 11,588	\$ 11,588	\$ 11,588	\$ 46,352	\$ 2	\$ 46,350	\$ 2
Payroll Taxes	\$ 3,546	\$ 1,134	\$ 914	\$ 886	\$ 886	\$ 3,820	\$ 274	\$ 3,546	\$ 274
Lawn/Grounds Upkeep	\$ 30,000	\$ 7,650	\$ 7,335	\$ 16,330	\$ 10,330	\$ 41,645	\$ 11,645	\$ 51,881	\$ (10,236)
Benefits(Medical, Unemployment, Pension)	\$ 12,976	\$ 2,998	\$ 3,007	\$ 3,006	\$ 3,977	\$ 12,988	\$ 12	\$ 13,145	\$ (157)
Insurance	\$ 30,000	\$ 7,597	\$ 8,250	\$ 11,829	\$ 8,949	\$ 36,625	\$ 6,625	\$ 29,870	\$ 6,755
Depreciation	\$ 29,100	\$ 5,091	\$ 5,091	\$ 5,091	\$ 17,248	\$ 32,521	\$ 3,421	\$ 28,433	\$ 4,088
Town Services Fee	\$ 30,000	\$ 7,500	\$ 7,500	\$ 7,500	\$ 10,495	\$ 32,995	\$ 2,995	\$ 31,277	\$ 1,718
Auto expense	\$ 5,000	\$ 2,285	\$ 157	\$ -	\$ 2,071	\$ 4,513	\$ (487)	\$ 8,009	\$ (3,496)
Electricity	\$ 14,000	\$ 4,096	\$ 2,738	\$ 3,369	\$ 3,494	\$ 13,697	\$ (303)	\$ 11,761	\$ 1,936
Heating oil	\$ 22,412	\$ 15,293	\$ 2,572	\$ -	\$ 5,514	\$ 23,379	\$ 967	\$ 19,658	\$ 3,721
Equipment Repairs and Rental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 349	\$ (349)
Garbage removal	\$ 1,920	\$ 575	\$ 633	\$ 750	\$ 660	\$ 2,618	\$ 698	\$ 2,108	\$ 510
General repairs	\$ 5,000	\$ -	\$ 1,349	\$ 2,658	\$ 5,200	\$ 9,207	\$ 4,207	\$ 9,524	\$ (317)
Janitorial	\$ 1,000	\$ -	\$ -	\$ 440	\$ -	\$ 440	\$ (560)	\$ 462	\$ (22)
Outside contractors	\$ 100	\$ -	\$ 79	\$ -	\$ -	\$ 79	\$ (21)	\$ 76	\$ 3
Gas & Water	\$ 275	\$ -	\$ 145	\$ -	\$ 86	\$ 231	\$ (44)	\$ 632	\$ (401)
Travel	\$ -	\$ -	\$ -	\$ -	\$ 209	\$ 209	\$ 209	\$ 186	\$ 23
Supplies	\$ 2,000	\$ 874	\$ 595	\$ 685	\$ 507	\$ 2,661	\$ 661	\$ 1,418	\$ 1,243

	FINAL Budget 2014	Actual Q1 2014	Actual Q2 2014	Actual Q3 2014	Actual Q-4 2014	Actual Thru 12/31/2014	Variance to Budget	2013 Actual	2014 vs 2013
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 395	\$ (395)
Total Property Support	\$ 233,679	\$ 66,681	\$ 51,953	\$ 64,132	\$ 81,214	\$ 263,980	\$ 30,301	\$ 259,080	\$ 4,900
Department of Communications and Ministries									
Printing, copying and postage "TOC"	\$ 18,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (18,000)	\$ -	\$ -
The Orthodox Church - Salaries	\$ 50,000	\$ 13,456	\$ 13,456	\$ 13,456	\$ 13,456	\$ 53,824	\$ 3,824	\$ 60,213	\$ (6,389)
Contract web master	\$ 30,000	\$ 1,680	\$ 9,755	\$ 11,190	\$ 10,560	\$ 33,185	\$ 3,185	\$ 34,055	\$ (870)
Website hosting and maintenance	\$ 1,200	\$ 422	\$ 3,298	\$ 455	\$ 696	\$ 4,871	\$ 3,671	\$ 2,952	\$ 1,919
Benefits(Medical, Unemployment, Pension)-TOC	\$ 4,535	\$ 1,271	\$ 1,033	\$ 1,006	\$ 1,004	\$ 4,314	\$ (221)	\$ 3,907	\$ 407
Internet/Telephone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel & Parking	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 42	\$ (42)
Office supplies & postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 260	\$ (260)
Equipment rental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Department of Communications and Ministries	\$ 103,735	\$ 16,829	\$ 27,542	\$ 26,107	\$ 25,716	\$ 96,194	\$ (7,541)	\$ 101,429	\$ (5,235)
Department of External Affairs									
Salaries - External Affairs	\$ 35,293	\$ 8,823	\$ 8,823	\$ 8,823	\$ 8,823	\$ 35,292	\$ (1)	\$ 35,293	\$ (1)
St. Catherines - Stipends	\$ 51,142	\$ 12,786	\$ 12,786	\$ 12,786	\$ 12,970	\$ 51,328	\$ 186	\$ 51,142	\$ 186
Interchurch travel	\$ 18,600	\$ 5,702	\$ 4,516	\$ 1,698	\$ 7,176	\$ 19,092	\$ 492	\$ 36,438	\$ (17,346)
St. Catherines - Benefits(Medical, Unempl, Pension)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Telephone & office expense	\$ 12,100	\$ 3,448	\$ 3,435	\$ 3,859	\$ 3,656	\$ 14,398	\$ 2,298	\$ 14,310	\$ 88
Benefits - External Affairs(Medical, Unempl, Pension)	\$ 3,166	\$ 840	\$ 683	\$ 656	\$ 672	\$ 2,851	\$ (315)	\$ 2,309	\$ 542
Bank Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 901	\$ (901)
Other interchurch organizations	\$ 7,600	\$ -	\$ -	\$ 5,000	\$ 3,510	\$ 8,510	\$ 910	\$ 7,724	\$ 786
Total Department of External Affairs	\$ 127,901	\$ 31,599	\$ 30,243	\$ 32,822	\$ 36,807	\$ 131,471	\$ 3,570	\$ 148,117	\$ (16,646)
Department of History and Archives									
Salaries	\$ 63,548	\$ 15,887	\$ 15,887	\$ 15,887	\$ 15,887	\$ 63,548	\$ (0)	\$ 63,548	\$ -
Payroll Taxes	\$ 4,861	\$ 1,542	\$ 1,254	\$ 1,215	\$ 1,215	\$ 5,226	\$ 365	\$ 4,861	\$ 365
Benefits(Medical, Unemployment, Pension)	\$ 24,876	\$ 7,727	\$ 7,719	\$ 7,743	\$ 10,696	\$ 33,885	\$ 9,009	\$ 29,270	\$ 4,615
Supplies/Travel	\$ 3,500	\$ 47	\$ 208	\$ 294	\$ 292	\$ 841	\$ (2,659)	\$ 3,762	\$ (2,921)
Total Department of History and Archives	\$ 96,786	\$ 25,203	\$ 25,068	\$ 25,139	\$ 28,090	\$ 103,500	\$ 6,714	\$ 101,441	\$ 2,059
Transfer from Repairs Reserve -									
Theological Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,500	\$ (11,500)
St Sergius Chapel	\$ 14,850	\$ 2,839	\$ 4,585	\$ 4,311	\$ 4,005	\$ 15,740	\$ 890	\$ 16,695	\$ (955)
Ordination Candidate Psychological Testing	\$ 38,000	\$ 4,187	\$ 8,395	\$ 1,575	\$ 7,435	\$ 21,592	\$ (16,408)	\$ 30,742	\$ (9,150)
Repayment of Perm Restricted Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75,000	\$ (75,000)
Repayment of 9/11 Funds to the Restricted Endowment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Policies and Procedures Regarding Sexual Misconduct	\$ 116,491	\$ 21,269	\$ 22,553	\$ 19,428	\$ 23,557	\$ 86,807	\$ (29,684)	\$ 89,266	\$ (2,459)
Strategic Planning-Continuing Education	\$ 75,000	\$ -	\$ -	\$ -	\$ 18,450	\$ 18,450	\$ (56,550)	\$ 24,125	\$ (5,675)
TOTAL OPERATING EXPENSES	\$ 1,917,965	\$ 449,476	\$ 428,293	\$ 412,488	\$ 473,848	\$ 1,762,105	\$ (155,860)	\$ 2,104,676	\$ (342,571)
NET OPERATING SURPLUS(DEFICIT)	\$ 90,377	\$ 34,781	\$ 75,090	\$ 89,348	\$ 39,445	\$ 238,664	\$ 148,287	\$ 59,109	\$ 179,555
Stewards Income & Expenses									
Stewards of the OCA Revenue	\$ 36,673	\$ 18,798	\$ 6,501	\$ 1,305	\$ 5,780	\$ 32,384	\$ (4,289)	\$ 60,585	\$ (28,201)
Diaconal Vocations Revenue	\$ 7,000	\$ 1,750	\$ 500	\$ 2,750	\$ 1,175	\$ 6,175	\$ (825)	\$ 6,975	\$ (800)
Program Fees	\$ 5,250	\$ -	\$ 100	\$ 2,550	\$ -	\$ 2,650	\$ (2,600)	\$ 21,035	\$ (18,385)
Dividends & Interest(net of investment fees)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total SOCA Income	\$ 48,923	\$ 20,548	\$ 7,101	\$ 6,605	\$ 6,955	\$ 41,209	\$ (7,714)	\$ 88,595	\$ (47,386)
Stewards of the OCA									
Ministries Conference	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 21,830	\$ (21,830)
SOCA Printing and Mailing Expense	\$ -	\$ 1,048	\$ -	\$ -	\$ -	\$ 1,048	\$ 1,048	\$ 152	\$ 896
TOTAL SOCA Expense	\$ -	\$ 1,048	\$ -	\$ -	\$ -	\$ 1,048	\$ 1,048	\$ 21,982	\$ (20,934)
Net SOCA Income(Deficit)	\$ 48,923	\$ 19,500	\$ 7,101	\$ 6,605	\$ 6,955	\$ 40,161	\$ (8,762)	\$ 66,613	\$ (26,452)
Departmental Expenses									
Department of Institutional Chaplaincy	\$ 12,275	\$ 1,642	\$ 1,500	\$ 1,802	\$ 1,900	\$ 6,844	\$ (5,431)	\$ 10,421	\$ (3,577)
Department of Evangelization	\$ 35,625	\$ 1,500	\$ 4,097	\$ 1,750	\$ 3,238	\$ 10,585	\$ (25,040)	\$ 17,271	\$ (6,686)
Department of Liturgical Music & Translations	\$ 14,700	\$ 2,561	\$ 2,532	\$ 4,430	\$ 3,404	\$ 12,927	\$ (1,773)	\$ 11,587	\$ 1,340
Department of Pastoral Life & Vocational Development	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Department of Christian Education	\$ 10,200	\$ 2,096	\$ 3,385	\$ 3,757	\$ 8,645	\$ 17,883	\$ 7,683	\$ 26,851	\$ (8,968)
Department of Youth and Young Adults	\$ 38,500	\$ 5,606	\$ 11,341	\$ 7,182	\$ 10,599	\$ 34,728	\$ (3,772)	\$ 33,216	\$ 1,512
Diaconal Vocations Program	\$ 18,475	\$ 3,000	\$ 3,235	\$ 3,001	\$ 3,000	\$ 12,236	\$ (6,239)	\$ 15,256	\$ (3,020)
Department of Christian Service	\$ 12,375	\$ 1,500	\$ 2,126	\$ 1,500	\$ 5,959	\$ 11,085	\$ (1,290)	\$ 7,706	\$ 3,379
Total Departmental Expenses	\$ 142,150	\$ 17,905	\$ 28,216	\$ 23,422	\$ 36,745	\$ 106,288	\$ (35,862)	\$ 122,308	\$ (16,020)
HONSDALE LOAN PRINCIPAL PAYMENTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 58,738	\$ (58,738)
Total Net Income(Deficit)	\$ (2,850)	\$ 36,376	\$ 53,975	\$ 72,531	\$ 9,655	\$ 172,537	\$ 175,387	\$ (55,324)	\$ 227,861
Extraordinary Items:									
-Loan Repayment to DOS/Land Value/Retirement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,579	\$ -
- Enthronement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (38,806)	\$ 38,806
Total Net Income(Deficit)	\$ (2,850)	\$ 36,376	\$ 53,975	\$ 72,531	\$ 9,655	\$ 172,537	\$ 175,387	\$ (43,551)	\$ 266,667
Unrestricted Funds:									
Net Operating Surplus/(Deficit)	\$ (2,850)	\$ 36,376	\$ 53,975	\$ 72,531	\$ 9,655	\$ 172,537	\$ 175,387	\$ (43,551)	\$ 266,667
Add Back Non-Cash Items (Depreciation & Amort)	\$ 29,100	\$ 5,091	\$ 5,091	\$ 5,091	\$ 17,248	\$ 32,521	\$ 3,421	\$ 31,509	\$ 1,012
Add Back Transfers (Not P&L Items)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Add Back Mortgage Principal Payment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 58,738	\$ (58,738)
Total Operating Surplus/(Deficit) - Unrestricted	\$ 26,250	\$ 41,467	\$ 59,066	\$ 77,622	\$ 26,903	\$ 205,058	\$ 178,808	\$ 46,696	\$ 208,941

	FINAL Budget 2014	Actual Q1 2014	Actual Q2 2014	Actual Q3 2014	Actual Q-4 2014	Actual Thru 12/31/2014	Variance to Budget	2013 Actual	2014 vs 2013
Temporarily Restricted Funds:									
Revenues:									
- Charity	\$ 5,000	\$ 512	\$ 25	\$ 25	\$ 754	\$ 1,316	\$ (3,684)	\$ 1,487	\$ (171)
- Missions & Church Planting Grants	\$ 5,000	\$ 1,481	\$ 165	\$ 1,050	\$ 903	\$ 3,599	\$ (1,401)	\$ 3,322	\$ 277
- Youth Ministry Bequest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Seminary	\$ 5,000	\$ 408	\$ -	\$ 150	\$ 9,805	\$ 10,363	\$ 5,363	\$ 27,144	\$ (16,781)
- North America Saints Project	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Kavalenko Trust	\$ 2,500	\$ 2,300	\$ 2,098	\$ (676)	\$ (329)	\$ 3,393	\$ 893	\$ 3,411	\$ (18)
- McGuire Trust	\$ 2,500	\$ 631	\$ 182	\$ 204	\$ 224	\$ 1,241	\$ (1,259)	\$ 53	\$ 1,188
- Rotko Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- York Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 72,245	\$ (72,245)
- All American Council	\$ -	\$ -	\$ -	\$ 27,571	\$ (27,514)	\$ 57	\$ 57	\$ -	\$ 57
- Other Bequests	\$ -	\$ -	\$ -	\$ 3,000	\$ 2,500	\$ 5,500	\$ 5,500	\$ 22,122	\$ (16,622)
Total Temporarily Restricted Revenues	\$ 20,000	\$ 5,332	\$ 2,470	\$ 31,324	\$ (13,657)	\$ 25,469	\$ 5,469	\$ 129,784	\$ (104,315)
Expenses:									
- Charity	\$ 5,000	\$ 1,896	\$ -	\$ 5,000	\$ -	\$ 6,896	\$ 1,896	\$ 10,000	\$ (3,104)
- Missions	\$ 100,000	\$ 26,667	\$ 24,000	\$ 26,200	\$ 32,300	\$ 109,167	\$ 9,167	\$ 91,000	\$ 18,167
- Church Planting Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Seminary	\$ 5,000	\$ -	\$ -	\$ -	\$ 9,780	\$ 9,780	\$ 4,780	\$ 26,247	\$ (16,467)
- Publications	\$ -	\$ -	\$ -	\$ -	\$ 3,397	\$ 3,397	\$ 3,397	\$ -	\$ 3,397
- Kavalenko Trust	\$ 4,000	\$ 1,721	\$ 910	\$ -	\$ 446	\$ 3,077	\$ (923)	\$ 4,530	\$ (1,453)
- McGuire Trust	\$ 4,000	\$ 707	\$ 661	\$ -	\$ (661)	\$ 707	\$ (3,293)	\$ 2,845	\$ (2,138)
- Rotko Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 325	\$ (325)
- York Trust	\$ -	\$ 325	\$ -	\$ 325	\$ (325)	\$ 325	\$ 325	\$ 53,425	\$ (53,100)
- All American Council (including PCC)	\$ 3,000	\$ 4,099	\$ 10,008	\$ 11,748	\$ 13,816	\$ 39,671	\$ 36,671	\$ 11,139	\$ 28,532
- Other (Release from Restrictions)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ (5,000)
Total Temporarily Restricted Disbursements	\$ 121,000	\$ 35,415	\$ 35,579	\$ 43,273	\$ 58,753	\$ 173,020	\$ 52,020	\$ 204,511	\$ (31,491)
Net Temporarily Restricted Surplus/(Deficit)	\$ (101,000)	\$ (30,083)	\$ (33,109)	\$ (11,949)	\$ (72,410)	\$ (147,551)	\$ (46,551)	\$ (74,727)	\$ (72,824)
Permanently Restricted Funds:									
Revenue:									
- St Andrew's Endowment	\$ 1,000	\$ 372	\$ 156	\$ 31	\$ 421	\$ 980	\$ (20)	\$ 1,182	\$ (202)
- Main Endowment	\$ 3,000	\$ 3,013	\$ 3,732	\$ 1,406	\$ 2,371	\$ 10,522	\$ 7,522	\$ 7,116	\$ 3,406
- FOS Endowment	\$ 1,000	\$ 313	\$ 378	\$ (7)	\$ 478	\$ 1,162	\$ 162	\$ 681	\$ 481
Total Revenues	\$ 5,000	\$ 3,698	\$ 4,266	\$ 1,430	\$ 3,270	\$ 12,664	\$ 7,664	\$ 8,979	\$ 3,685
Funds Released:									
- St Andrew's Endowment	\$ 400	\$ 146	\$ 949	\$ (492)	\$ 783	\$ 1,386	\$ 986	\$ 739	\$ 647
- Main Endowment	\$ 3,675	\$ 670	\$ 838	\$ 674	\$ 774	\$ 2,956	\$ (719)	\$ 2,906	\$ 50
- FOS Endowment	\$ 400	\$ 97	\$ 263	\$ 98	\$ 97	\$ 555	\$ 155	\$ 585	\$ (30)
Total Funds Released	\$ 4,475	\$ 913	\$ 2,050	\$ 280	\$ 1,654	\$ 4,897	\$ 422	\$ 4,230	\$ 667
Net Permanently Restricted Surplus/(Deficit)	\$ 525	\$ 2,785	\$ 2,216	\$ 1,150	\$ 1,616	\$ 7,767	\$ 7,242	\$ 4,749	\$ 3,018
Total Change in Net Assets	\$ (103,325)	\$ 9,078	\$ 23,082	\$ 61,732	\$ (61,139)	\$ 32,753	\$ 136,078	\$ (54,791)	\$ 87,544

Other Donations 2014

	Orthodox Church in America Other Donations - 2014	Exhibit C
Category	Donor Name	Amount
Clergy Care Fund	St Nicholas Russian Orthodox Cathedral	\$3,000.00
Clergy Care Fund Total		\$3,000.00
Earmark	Mr & Mrs Christopher Ambroze	\$100.00
Earmark	Mr. Barry Migyanko	\$500.00
Earmark	Mr. Barry Migyanko	\$500.00
Earmark	Mr. Barry Migyanko	\$500.00
Earmark	Mr. Barry Migyanko	\$500.00
Earmark	Mr. George Scouras	\$300.00
Earmark	V. Rev. Eric G Tosi	\$1,000.00
Earmark Total		\$3,400.00
Gen Donation	Anonymous	\$10.00
Gen Donation	Department of the Air Force	\$250.00
Gen Donation	Diocese of Western PA	\$80.00
Gen Donation	G3 Group	\$612.00
Gen Donation	Mr. Paul G Hodireff	\$250.00
Gen Donation	Mr & Mrs Nektary Lukianov	\$50.00
Gen Donation	Matushka Marilyn M Nedelkoff	\$10.00
Gen Donation Total		\$1,262.00
Lit Music Donation	Mr & Mrs Donald T Hill	\$25.00
Lit Music Donation	Holy Trinity Church Choir	\$100.00
Lit Music Donation	Mr & Mrs Anthony Kasmer	\$100.00
Lit Music Donation	Ms. Jean E Long	\$30.00
Lit Music Donation Total		\$255.00
Bequest	Koniag, Inc.	\$60.02
Bequest	Konig, Inc.	\$60.02
Bequest Total		\$120.04
ENDOW REV	Estate of Konstantine Sakovich	\$464.21
ENDOW REV	Estate of Konstantine Sakovich	\$107.95
ENDOW REV	Estate of Konstantine Sakovich	\$193.47
ENDOW REV	Estate of Konstantine Sakovich	\$310.49
ENDOW REV	Estate of Konstantine Sakovich	\$96.97
ENDOW REV	Estate of Konstantine Sakovich	\$275.71
ENDOW REV	Estate of Konstantine Sakovich	\$293.67
ENDOW REV	Estate of Konstantine Sakovich	\$98.35
ENDOW REV	Estate of Konstantine Sakovich	\$161.06
ENDOW REV	Estate of Konstantine Sakovich	\$288.95
ENDOW REV	Estate of Konstantine Sakovich	\$97.44
ENDOW REV	Estate of Konstantine Sakovich	\$91.59
ENDOW REV Total		\$2,479.86
Charity Appeal	All Saints Orthodox Church	\$65.00
Charity Appeal	Anonymous	\$100.00
Charity Appeal	Anonymous	\$200.00
Charity Appeal	Assumption of the Holy Virgin Church	\$285.00
Charity Appeal	Diocese of New England	\$152.00
Charity Appeal	Diocese of Western PA	\$134.00
Charity Appeal	Mr & Mrs Alan Dupay	\$25.00
Charity Appeal	Mr. Alan Dupay	\$25.00
Charity Appeal	Mr. Alan Dupay	\$25.00

Other Donations 2014

Charity Appeal	Holy Resurrection Orthodox Church	\$160.00
Charity Appeal	V. Rev. & Mrs. John Jillions	\$50.00
Charity Appeal	Mr & Mrs John Kozey III	\$100.00
Charity Appeal	Russian Orthodox Church of the Assumption	\$285.00
Charity Appeal	St Andrews Orthodox Church	\$25.00
Charity Appeal	St Mark Orthodox Church	\$25.00
Charity Appeal	St Michael Orthodox Church	\$110.00
Charity Appeal	United World Foundation Inc	\$200.00
Charity Appeal Total		\$1,966.00
Mission Appeal	All Saints Orthodox Church	\$20.00
Mission Appeal	Assumption of the Holy Virgin Church	\$389.00
Mission Appeal	Diocese of New England	\$195.00
Mission Appeal	Diocese of New England	\$107.00
Mission Appeal	Mr. Alan Dupay	\$25.00
Mission Appeal	Mr. Alan Dupay	\$25.00
Mission Appeal	Mr. Alan Dupay	\$25.00
Mission Appeal	Mr. Alan Dupay	\$25.00
Mission Appeal	Holy Resurrection Orthodox Church	\$165.00
Mission Appeal	Dr. & Mrs. Constantin H. Kallaur	\$100.00
Mission Appeal	Protection of the Virgin Mary	\$658.00
Mission Appeal	Russian Orthodox Church of the Assumption	\$389.00
Mission Appeal	St Andrews Orthodox Church	\$31.00
Mission Appeal	St Luke Serbian Eastern Church	\$1,000.00
Mission Appeal	St Michael Orthodox Church	\$225.00
Mission Appeal	St Stephen the Protomartyr Church	\$220.00
Mission Appeal Total		\$3,599.00
Peter the Aleut	Monastery of the Transfiguration	\$2,500.00
Peter the Aleut Total		\$2,500.00
Seminary Appeal	All Saints Orthodox Church	\$45.00
Seminary Appeal	Dr. James F Delansky	\$9,779.69
Seminary Appeal	Diocese of New England	\$167.00
Seminary Appeal	Diocese of New England	\$127.00
Seminary Appeal	Mr. Alan Dupay	\$25.00
Seminary Appeal	Mr. Alan Dupay	\$25.00
Seminary Appeal	Mr. Alan Dupay	\$25.00
Seminary Appeal	Mr. Alan Dupay	\$25.00
Seminary Appeal	Mr. Vladimir Kash	\$100.00
Seminary Appeal	St Andrews Orthodox Church	\$44.00
Seminary Appeal Total		\$10,362.69
Grand Total		\$28,944.59

Orthodox Church in America

Audit Committee

Michael S. Strelka, CPA, CVA, Chair
Karen L. Simons-Durkish, CPA, Member
Vera Bozko-Summer, Member

January 14, 2015

The Holy Synod of Bishops and Metropolitan Council
Orthodox Church in America
P.O. Box 675
Syosset, New York 11791

Your Beatitude, Your Eminences, Your Graces, Brothers and Sisters in Christ:

Most Blessed Master Bless!

The Audit Committee has not made any visits to the Chancery offices since our last visit August 12-13, 2014. At the request of Melanie Ring, Treasurer, we will make one last visit before our terms of office expire, probably in June, unless circumstances dictate otherwise. We have performed the following procedures since that visit:

BUDGETED ITEMS


Each income statement account for the 9 months ending 9/30/14, were reviewed in comparison with their respective budgets for 2014. No unusual or unexpected variances were noted.

STAVROPEGIAL SEMINARIES

Our committee is also mandated by the OCA Statute to review the audited financial statements of the two Stavropegial seminaries, and report any noted items. We have reviewed the audited financial reports of St. Vladimir Orthodox Theological Seminary for the year ended June 30, 2014, and have noted nothing unusual in their report. The audit report for St. Tikhon's Seminary has historically been released in April, and as such has not yet been reviewed by our committee.

On behalf of the Committee, please accept our thanks for allowing us to use our professional skills and abilities for the benefit of the Church.

Yours in Christ,



Michael S. Strelka, CPA
Chair