



**ORTHODOX
CHURCH in
AMERICA**

Metropolitan Council Meeting

Fall 2017

Committees/Departments Reports



**Meeting of the Metropolitan Council
September 19 to September 22, 2017
Committees/Departments Reports
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Charity Committee Report for Fall 2017 Metropolitan Council Meeting

Charity Committee members: His Eminence Archbishop Melchizedek, Episcopal liaison, Archpriest John Jillions, Chancellor, Melanie Ringa, treasurer, Archpriests John Dunlop, Thomas Moore, Antonio Perdomo, Alexander Kuchta, chair, Maureen Jury, and Lisa Mikhalevsky.

Balance as of December 31, 2016	\$8,146.76
Donations 1/1/17 - 8/16/17	914.00

Charity Distributions:

- Dental Surgery Bill	\$2,790.00
- Diocese of Eastern PA for injured clergy	1,000.00
- Church World Service - refugee resettlement	1,000.00
- Stripe Fees 1/1 - 8/16/17	13.78
Total Distributions and expenses	4,803.78
Balance as of August 16, 2017	4,256.98

Comments:

-The December 2016 is \$216.00 more than was cited in the Spring report due to some donations received before the close of last year.

-Eighteen donations were made by twelve individuals and three parishes.

-I would suggest posting a appeal letter from the Committee on oca.org early in November to capitalize on the OCA's tradition of charitable collections in the past.

-If anyone would like to become a member of this committee, please speak with Fr. Alexander Kuchta.

Respectfully submitted,



Archpriest Alexander Kuchta

Ethics Committee Report for Fall 2017 Metropolitan Council

No Written Report

Orthodox Church in America
Finance/Investment Committee
Report to the Metropolitan Council - September 2017

The following report will discuss the status of the OCA investment accounts. The four Investment Advisory Accounts were opened with the Philadelphia Trust Company (PTC) under the terms of Investment Advisory Agreements between the Orthodox Church in America (OCA) and the PTC dated December 4, 2014. Funds weren't moved to the PTC for actual investment management until sometime during 2015. OCA endowment funds are now fully invested with PTC.

The four investment accounts are: Main Endowment Account, St. Andrew's Endowment Account, FOS Endowment Account, and Mission Endowment Account. Under the terms of the Investment Advisory Agreements, PTC has been given **full discretionary authority** to, "make all investment decisions taking into account the Client's (OCA's) investment objectives as disclosed in writing to Advisor (PTC)." The OCA, however, doesn't have a written Investment Policy Statement. The goal of the Investment Committee is to have the Metropolitan Council adopt a formal Investment Policy Statement for the OCA. This will become more critical, providing direction to the investment manager, as the OCA endowment funds continue to grow. The PTC provides a daily update of the portfolio balances through the investment custodian, SEI Trust Company, PA, and provides notice of any sales or purchases of securities. On March 23, 2017, Melanie Ringa, OCA Treasurer, and Larry Skvir, Investment Committee member, met with Michael Crofton, CEO of PTC, for a review of the OCA's investment portfolio at the PTC corporate offices in Center City Philadelphia.

According to the Investment Advisory Agreements, the OCA portfolios are Balanced Portfolios, "a blend of high quality fixed income and equity securities selected to achieve the objectives of capital preservation, income, and long-term growth." PTC has historically outperformed the S&P 500. From PTC's inception in June 30, 1999 through December 31, 2016, its annualized equity performance composite return is 7.75% versus a return of 4.45% for the S&P during the same period. For the full year 2016, PTC's equity performance composite return was 14.14% against 11.95% for the S&P.

All four OCA accounts are heavily invested in equities as of July 31, 2017. The percentage of equities in the accounts ranges from 81% in the Main Endowment Account – the largest of the four accounts – to 92% in the FOS and St. Andrew's Endowment Accounts. The equity holdings are actively managed and there is a fairly high degree of turnover in the portfolio. The turnover was 41% in 2015 and 35% in 2016. The historic turnover, however, has been much higher. PTC invests in companies listed on American stock exchanges with quality management, demonstrated sales and earnings growth, and industry leadership. Holdings are diversified by eleven industry segments: Consumer Discretionary, Consumer Staples, Energy, Financials, Health Care, Industrials, Information Tech, Materials, Real Estate, Telecommunications, and Utilities. Information Tech and Financials currently represent a combined 45% of equity holdings.

The four OCA investment accounts have shown good gains since June 30, 2016.

(000)	6/30/2016	12/31/2016	7/31/2017	Gain
Main Endowment	\$ 938	\$1,072	\$1,262	+ \$324
St. Andrew's	\$ 99	\$ 113	\$ 112	+ \$ 13
FOS Endowment	\$ 66	\$ 74	\$ 79	+ \$ 13
Mission Endowment	\$ 744	\$ 852	\$ 948	+ \$214
Total Funds	\$1,847	\$2,011	\$2,411	+ \$564

Respectfully submitted,

Larry Skvir
Member
Finance/Investment Committee

Investment Policy Statement

1. **BACKGROUND, PURPOSE AND SCOPE**

- 1.1 The primary function of the Orthodox Church in America (“OCA”) investment assets is to provide financial resources to help underwrite and support -----
- 1.2 The investment policy of the OCA seeks to ensure prudent management by combining the goal of total return and preservation of capital with moderate risk tolerance in order to achieve Investment results consistent with the financial goals and objectives of the OCA.
- 1.3 This statement is intended to serve as an operating document to guide the OCA’s investment activities and:
 - 1.3.1 Define responsibilities among the various groups accountable for guiding the Investment process and supervising outside investment professionals,
 - 1.3.2 Determine an appropriate return and risk tolerance for the OCA,
 - 1.3.3 Establish allocation ranges for asset classes and suitable investment styles,
 - 1.3.4 Determine prudent diversification of assets, and
 - 1.3.4 Establish performance objectives and a review process.
- 1.4 The OCA is also the sole income beneficiary of several trusts held by outside corporate trustees. This policy does not address or apply to the management of investments held by these trusts.

2. **DELEGATION OF RESPONSIBILITIES**

2.1 **Responsibilities of the Metropolitan Council (“Council”)**

- 2.1.1 Direct oversight role regarding all decisions that impact the OCA’s invested funds. The Council has delegated operating and supervisory responsibility for the OCA’s invested funds to the Finance and Investment Committee (“Committee”).
- 2.1.2 Selection, appointment and removal of the Committee or Committee members.
- 2.1.3 Approve investment policies and objectives that reflect the long-term orientation of the OCA’s invested funds.
- 2.1.4 Oversee the OCA’s compliance with its investment policy.

2.2 **Responsibilities of the Committee**

- 2.2.1 Seek to ensure that the assets available for investment are managed:
 - 2.2.1.1 Exclusively for the benefit of the OCA and its mission.
 - 2.2.1.2 Prudently and in full compliance with all policies, applicable laws and regulations.
 - 2.2.1.3 Effectively, so as to protect the purchasing power over time of the assets of the OCA’s invested funds.
- 2.2.2 Recommend to the Council long-term investment policies and objectives for the OCA’s invested funds. This includes studying and selecting asset classes, determining asset allocation ranges and managers, and setting performance objectives for the OCA’s invested funds and fund manager(s).
- 2.2.3 Propose recommendations to the Council regarding the management of the OCA’s invested funds.

- 2.2.4 Determine that assets are prudently and effectively managed.
- 2.2.5 Monitor and evaluate the performance of all fund managers by review of reports provided to the Committee and by meetings with the fund managers.
- 2.2.6 **Retain or dismiss outside professionals.**
- 2.2.7 Receive and review reports from fund managers and investment consultants regarding the status of the OCA's Invested funds.
- 2.2.8 Meet periodically to evaluate whether this policy, the investment activities, the risk management controls and processes continue to be consistent with meeting the OCA's investment goals and objectives.

2.3 **Responsibilities of the Treasurer**

- 2.3.1 Oversee day-to-day operational investment activities of the OCA's invested funds subject to policies established by the Council and Committee.
- 2.3.2 Assist in establishing long-term investment policies and objectives for the OCA's invested funds.
- 2.3.3 Communicate the Statement of Investment Policy to outside professionals such as the custodian, fund manager, and investment consultants.
- 2.3.4 Work with fund managers, investment consultants, and other outside professionals to meet the overall goals and objectives of the OCA's invested funds.
- 2.3.5 Allocate and reallocate the OCA's invested funds among asset classes, investment styles and fund managers within allocation ranges previously approved.
- 2.3.6 Receive and review reports from outside professionals regarding the status of the OCA's invested funds.
- 2.3.7 Issue status reports to the Council and Committee on a periodic basis.

2.4 **Responsibilities of the Fund Managers**

- 2.4.1 The fund managers have full discretion to manage the assets of the OCA's invested funds in accordance with the investment objectives and guidelines expressed by this Statement of Investment Policy. For managers retained under a mutual fund or co-mingled fund agreement, it is expected that the OCA's invested funds operate under the specific guidelines outlined in its prospectus or offering memorandum.
- 2.4.2 Communicate promptly with Treasurer regarding all significant matters such as:
 - 2.4.2.1 Major changes in the firm's investment outlook and strategy,
 - 2.4.2.2 Shifts in the portfolio construction,
 - 2.4.2.3 Changes in the firm's ownership, organizational structure, or professional staff and,
 - 2.4.2.4 Other changes of a substantive nature
- 2.4.3 Adhere to the investment policies and guidelines prescribed for the OCA's invested funds. Any specific concerns about the appropriateness of an investment should be clarified in advance of purchase.
- 2.4.4 Comply with all laws, legislation, and regulations that involve the OCA's invested funds as they pertain to the manager's duties, functions and responsibilities as a fiduciary.
- 2.4.5 Secure, reconcile, and vote proxies on the securities in the portfolio in accordance with its fiduciary duties, professional judgment and in the best interest of the OCA.
- 2.4.6 Effect security trading on a best execution basis. Placement of orders should be based upon financial viability of the brokerage firm and the assurance of prompt and efficient execution.
- 2.4.7 Direct trades with best execution in mind at all times.

- 2.4.8 Issue monthly and/or quarterly reports, with regards to investment performance, to the staff and investment consultants.
- 2.4.9 Meet periodically with the Committee, staff, and/or investment consultants to report on the management of assets.
- 2.4.10 Fully disclose, annually, all fees and expenses.
- 2.4.11 Provide audited financial statements and **ADV (if applicable)**.

2.5 **Responsibilities of the Custodian**

- 2.5.1 Serve as custodian and act in a fiduciary capacity for the OCA's invested funds.
- 2.5.2 Provide safekeeping of securities entrusted to it; collect dividends and interest on these securities; make disbursements and manage cash flows as directed.
- 2.5.3 Arrange for timely settlement of all transactions made for the OCA's invested funds.
- 2.5.4 Provide complete and accurate accounting records including each transaction, income flow and cash flow by investment manager, asset class and OCA's invested funds.
- 2.5.5 Issue monthly reports of holdings and transactions priced in accordance with industry standards.
- 2.5.6 Meet periodically with staff and investment consultant to report on the administration of the OCA's invested funds.

2.6 **Responsibilities of Investment Consultants**

- 2.6.1 Act in a fiduciary capacity for the OCA's invested funds.
- 2.6.2 Monitor and communicate long-term capital market trends and recommend broad-based asset-mix policies to be considered by the Committee and to be implemented by the investment managers, if approved.
- 2.6.3 Review investment policies and objectives, and recommend changes, as appropriate.
- 2.6.4 Provide general advice concerning the allocation of new contributions as well as periodic asset allocation rebalancing.
- 2.6.5 Research and recommend investment management firms, which are appropriate to implement the OCA's investment policies and objectives.
- 2.6.6 Monitor and assess service providers (fund managers and custodian) and report on changes within the organizations.
- 2.6.7 Measure, evaluate and report the fund managers' performance results on a quarterly basis.
- 2.6.8 Meet periodically with the Council, Committee, and treasurer to report on the management of the OCA's invested funds.
- 2.6.9 Provide support to the Council, Committee, and treasurer.
- 2.6.10 Provide topical research and education on investment subjects that are relevant to endowment.

3. **SPENDING POLICY**

- 3.1 The Council has established a spending policy that attempts to balance the long-term objective of maintaining the purchasing power of the OCA's invested funds with the goal of meeting current and future cash flow requirements.
- 3.2 The Council has designated a portion of the OCA's invested funds cumulative investment return to be used for support of current operations. Under the OCA's spending policy, for any fiscal year, a portion of the average market value of the OCA's investment

balances for the previous 12 quarters is appropriated to support current operations. See Exhibit 1 for annual spending rates.

- 3.3 The Committee will review the spending policy annually. From time to time the OCA's Council-approved operating budget may include plans to utilize more than the approved return from the OCA's invested assets. Special situations (e.g. donor specifications) may necessitate an exception to the general spending policy as established herein.

4. RISK TOLERANCE

- 4.1 The following statements reflect the Committee's understanding of capital market risk as well as measures adopted to control undue portfolio volatility:
- 4.2 The Committee fully recognizes the likelihood of periodic market declines and is willing to accept the possibility of some short-term declines in market value in order to achieve potentially higher long-term investment returns.
- 4.3 The Committee will consider investments appropriate for the OCA's invested funds based on thorough research. Assets of the OCA's invested funds are to be diversified to protect against large investment losses and to reduce the probability of excessive performance volatility.
- 4.4 Diversification of assets may be achieved by:
 - 4.4.1 allocating OCA's invested funds to various asset classes and investment styles within asset classes.
 - 4.4.2 retaining fund manager (s) with complementary investment philosophies, styles, and approaches.
- 4.5 A reasonable time horizon for evaluating the OCA's investment performance shall be long-term (five to ten years). Time frames for evaluating the performance of investment managers should approximate a market cycle (three to five years).

5. ASSET ALLOCATION GUIDELINES

- 5.1 The Committee, with advice from investment consultants and managers, shall determine the asset allocation strategy for the OCA's investment funds. The Committee and treasurer will manage the asset allocation mix within the allocation ranges stated by this policy. To implement this strategy, the Committee will select an asset allocation mix which will diversify investments among asset classes, and which is designed to meet the objectives of the OCA's invested funds.
- 5.2 The asset allocation parameters, which will guide investment activities for the OCA's invested funds are presented in Exhibit II.
- 5.3 The Committee may diversify assets among multiple fund managers of varying investment styles to the extent that such diversification can be expected to reduce risk without sacrificing expected investment return, or that such diversification may produce greater investment return without incurring any greater risk.
- 5.4 Comingled invested funds and/or mutual funds, which meet general intent of the policy guidelines, may be utilized.
- 5.5 The Committee will continually evaluate the trend of investment results in relationship to investment expectations and establish different allocations among various asset classes and/or fund managers that appear likely to satisfy the requirements of the OCA's invested funds.

- 5.6 Cash inflows and outflows will be allocated in accordance with the asset allocation policy.
- 5.7 The Committee will review the OCA's invested fund's asset allocation at least annually.
- 5.8 The Committee may develop an interim asset allocation that incorporates the under and overweight positions that result from the slow, methodical approach to build private investments, i.e. private equity, real estate and private natural resources as listed in Exhibit III.
- 5.9 Special investment situations may necessitate an amendment to the Statement of investment Policy and Objectives as deemed appropriate by the Council and the Committee.

6. INVESTMENT OBJECTIVES

- 6.1 Investment objectives are necessary and appropriate to properly measure and evaluate the success of each OCA's investment program. Performance will be evaluated net of investment management fees.
- 6.2 For Total Invested Funds
 - 6.2.1 Achieve a total rate of return, over rolling ten-year periods, which exceeds the rate of inflation (C.P.I.) by 5% per year on average.
 - 6.2.2 Outperform a passive portfolio, consisting of a similar asset allocation to the OCA's invested funds, over rolling five-year periods.
 - 6.2.3 Risk, as measured by standard deviation, should be commensurate with a passive portfolio, consisting of a similar asset allocation to the OCA's invested funds, over rolling ten-year periods.
- 6.3 Fund Managers
 - 6.3.1 Outperform a passive, style-specific index over rolling five-year periods.
 - 6.3.2 Rank in the top half (top 50 %) in a style-specific peer-group universe over rolling five-year periods (specific style benchmarks and peer groups will be selected for each manager).
 - 6.3.3 The following fund manager guidelines may be used to begin discussion regarding manager termination or probation:
 - 6.3.3.1 Three-year relative performance drops below the 50th percentile of the peer group and remains there for the next three consecutive quarters.
 - 6.3.3.2 Most recent one-year ranking is in the bottom quartile of the peer group.
 - 6.3.3.3 A distinctive and recognizable departure from the investment style and/or philosophy from which the manager was selected.
 - 6.3.3.4 Significant organizational events such as a change in the portfolio manager, firm ownership, etc.
 - 6.3.3.5 Absence of any circumstances satisfactory to the Committee to warrant retention.
 - 6.3.4 NOTE: Exceptions to the manager guidelines may exist. Fund manager guidelines are meant to foster discussion and possible action. They are not meant to automatically trigger a termination.

7. INVESTMENT GUIDELINES

- 7.1 Each fund manager shall have full investment discretion with regard to security selection as set forth in this Statement of Investment Policy and Objectives.
- 7.2 Fund management firms are expected to act in an ethical manner and with Integrity in all phases of the investment process. It is expected that, as a minimum requirement, fund managers will comply with the Code of Ethics and The Standards of Professional Conduct as established by the Association for Investment management and Research (AIMR).
- 7.3 Equity Segment
 - 7.3.1 The equity segment should be diversified across a spectrum of market capitalizations by allowing investments in small-, medium-, and large capitalization stocks.
 - 7.3.2 Equity holdings should be readily marketable and diversified by issue, industry, and sector.
 - 7.3.3 Global equity holdings should be diversified among countries, geographic regions, and currencies in line with their specific mandate.
 - 7.3.4 The fund manager may use currency-hedging strategies to protect against adverse currency movements. Portfolios can be hedged back to the base currency (the U.S. dollar) or cross-hedged into other, more attractive, currencies.
 - 7.3.5 Equity managers may invest in commercial paper, other money-market investments and money-market mutual funds as well as bond investments as a surrogate for cash reserves from time-to-time. However, the intent is to have the fund manager remain fully invested.
- 7.4 Fixed income Segment
 - 7.4.1 The fixed income segment should be diversified by issue, industry, sector, coupon, and quality and be readily marketable.
 - 7.4.2 Global fixed income holdings should be diversified among countries, geographic regions and currencies in line with their specific mandate.
 - 7.4.3 The fund manager may use currency-hedging strategies to protect against adverse currency movements. Portfolios can be hedged back to the base currency (the U.S. dollar) or cross-hedged into other, more attractive currencies.
 - 7.4.4 Fixed income managers may invest in commercial paper, other money-market investments and money-market mutual funds as well as bond investments as a surrogate for cash reserves from time-to-time. However, the intent is to have the fund manager remain fully invested.
- 7.5 Alternative Investment Segment
 - 7.5.1 The Committee may review and approve alternative asset classes, strategies, and investments. Approved actions shall be thoroughly documented describing the asset class, security, or strategy, and provide a detailed explanation of the potential benefits and risks associated with it.
 - 7.5.2 Alternative investment holdings should be diversified by style, strategy and manager.
- 7.6 Conflict of Interest
 - 7.6.1 To avoid any potential conflicts of interest, no Council Member of the OCA may be a direct fund manager for the OCA. In the case of multiple manager pooled funds, this restriction is waived.
 - 7.6.2 If an outside consultant engaged by the OCA to guide fund manager selections recommends a fund manager with which a Council Member is any

way connected (including firms for which they may work), the Council Member must recuse himself or herself from participating in any decision by the Committee regarding said fund manager.

8. EVALUATION AND REVIEW PROCESS

- 8.1 The Committee will evaluate investment performance periodically. It will review the following:
- 8.2 The OCA's invested funds asset allocation relative to its Investment Policy and the capital market outlook.
- 8.3 The extent to which each fund manager has managed its portfolio consistent with that manager's stated investment philosophy and style.
- 8.4 Each fund manager's adherence to the guidelines and investment policies contained in this Statement.
- 8.5 The performance of the OCA's invested funds and each fund manager to determine whether the OCA's invested fund's objectives are being met. One such measure will be to compare the OCA's performance against its Total Portfolio Benchmark. The OCA's Total Portfolio Benchmark is based on its asset allocation parameters using suitable market indices to represent each asset class. This custom index is calculated monthly using the weights listed in Exhibit II. Managers within each asset class will be measured against a specific style benchmark along with the market benchmark for their asset class.
- 8.6 The Committee will review the Statement of Investment Policy and Objectives periodically to determine that it continues to be appropriate in view of changes within the OCA's invested funds and the capital markets. The Committee, as deemed appropriate, may consider exceptions to the Statement of Investment Policy and Objectives.

9. APPROVAL

- 9.1 The Statement of Investment Policy and Objectives was approved by the Council at its (?) meeting dated (?) with an effective date of (?).

Exhibit I – Spending Rate History

<u>Year</u>	<u>Spending Rate</u>
Prior to 2018	Spend yield only
2018 Forward	X%

Exhibit II – Asset Allocation and Benchmark Parameters

Asset Class	Target Allocation	Allocation Range	Market Index
Equities	51%	40-65%	
<i>US Large/Mid Cap Equity</i>	22%		S&P 500
<i>US Small Cap Equity</i>	5%		Russell 2000
<i>International Equity</i>	17%		MSCI EAFE
<i>Emerging Markets</i>	7%		MSCI EM
Fixed Income	17%	15-30%	
<i>Core (US) Fixed Income</i>	12%		Barclay's Aggregate
<i>Non-US Fixed Income</i>	5%		Citigroup World Gvt Bond Index
Alternatives	30%	10-40%	
<i>Hedge Funds</i>	15%		HFRI FoF
<i>Hard Assets</i>	5%		DJ UBS Commodity Index
<i>Private Equity</i>	5%		S&P 500
<i>Real Estate</i>	5%		NCREIF
Cash & Equivalents	2%		US Treasury Bills
Total	100%		

Exhibit III – Interim Asset Allocation and Benchmark Parameters

Asset Class	Target Allocation	Allocation Range	Market
Equities	55%	40-65%	
<i>US Large/Mid Cap Equity</i>	24%		S&P 500
<i>US Small Cap Equity</i>	5%		Russell 2000
<i>International Equity</i>	18%		MSCI EAFE
<i>Emerging Markets</i>	8%		MSCI EM
Fixed Income	16%	15-30%	
<i>Core (US) Fixed Income</i>	11%		Barclay's Aggregate
<i>Non-US Fixed Income</i>	5%		Citigroup World Gvt Bond Index
Alternatives	23%	10-40%	
<i>Hedge Funds</i>	15%		HFRI FoF
<i>Hard Assets</i>	5%		DJ UBS Commodity Index
<i>Private Equity</i>	1%		S&P 500
<i>Real Estate</i>	2%		NCREIF
Cash & Equivalents	6%		US Treasury Bills
Total	100%		

OCA ENDOWMENT FUNDS W/PHILADELPHIA TRUST COMPANY

	6/30/2016	9/14/2016	12/31/2016	1/31/2017	2/28/2017	3/23/2017	3/31/2017	4/30/2017	5/30/2017	6/30/2017	7/31/2017
#944 - MAIN ENDOWMENT	\$938	\$956	\$1,072	\$1,165	\$1,188	\$1,165	\$1,180	\$1,206	\$1,223	\$1,261	\$1,262
Growth - Period to Period		(+18)	(+116)	(+93)	(+23)	(-23)	(+15)	(+26)	(+17)	(+38)	(+1)
Growth - Cumulative			(+134)	(+227)	(+250)	(+227)	(+242)	(+268)	(+285)	(+323)	(+324)
#945 - ST. ANDREW'S ENDOWMENT	\$99	\$99	\$113	\$111	\$114	\$112	\$113	\$115	\$109	\$111	\$112
Growth - Period to Period		(+0)	(+14)	(-2)	(+3)	(-2)	(+1)	(+2)	(-6)	(+2)	(+1)
Growth - Cumulative			(+14)	(+12)	(+15)	(+13)	(+14)	(+16)	(+10)	(+12)	(+13)
#946 - FOS ENDOWMENT	\$66	\$66	\$74	\$73	\$75	\$74	\$75	\$76	\$76	\$78	\$79
Growth - Period to Period		(+0)	(+8)	(-1)	(+2)	(-1)	(+1)	(+1)	(+0)	(+2)	(+1)
Growth - Cumulative			(+8)	(+7)	(+9)	(+8)	(+9)	(+10)	(+10)	(+12)	(+13)
#947 - MISSION ENDOWMENT	\$744	\$761	\$852	\$843	\$894	\$878	\$888	\$903	\$915	\$949	\$958
Growth - Period to Period		(+17)	(+91)	(-9)	(+51)	(-16)	(+10)	(+15)	(+12)	(+34)	(+9)
Growth - Cumulative			(+108)	(+99)	(+150)	(+134)	(+144)	(+159)	(+171)	(+205)	(+214)
Total Cumulative Gains		(+35)	(+264)	(+345)	(+424)	(+382)	(+409)	(+453)	(+476)	(+552)	(+564)

Human Resources Committee Report for Fall 2017 Metropolitan Council

No Written Report

Internal Governance Committee Report for Fall 2017 Metropolitan Council

No Written Report

Report of the Metropolitan Council Legal Committee

Fall Meeting of the Metropolitan Council of the Orthodox Church in America
September 19-22, 2017

Introduction

The Metropolitan Council Legal Committee was created by Resolution of the Metropolitan Council, and blessed by the Holy Synod, at the Spring 2008 Metropolitan Council meeting.¹ That Resolution, which is set forth both in the meeting minutes and in the Metropolitan Council Member Handbook, provides as follows:

“The Metropolitan Council Legal Committee, consisting of at least three to five members, shall between meetings of the Metropolitan Council act for and on behalf of the Metropolitan Council to discharge its legal responsibilities. The Legal Committee shall work in conjunction with the General Counsel and members of the Central Administration. Responsibility for major policy and legal decisions, such as initiation of litigation and settlement of litigation, shall be retained by the Metropolitan Council as a whole. The Legal Committee shall fully and promptly report to the Metropolitan Council its activities and decisions between meetings. The Legal Committee shall act by majority vote. The Legal Committee may act by telephonic meeting or consent evidenced in writing or email, or such other means as means that the Legal Committee shall determine to be useful or appropriate.”

(The current Legal Committee consists of three (3) members.)

¹ 10.4. MOTION – G. Nescott / Fr. M. Searfoorce: Be it resolved, that a Metropolitan Council Legal Committee, consisting of at least three to five members is hereby established. Such committee shall between meetings of the Metropolitan Council act for and on behalf of the Metropolitan Council to discharge its legal responsibilities. The Legal Committee shall work in conjunction with the General Counsel and members of the Central Administration. Responsibility for major policy and legal decisions, such as initiation of litigation and settlement of litigation, shall be retained by the Metropolitan Council as a whole. The Legal Committee shall fully and promptly report to the Metropolitan Council its activities and decisions between meetings, and Be it further resolved, that the Legal Committee shall act by majority vote. The Legal Committee may act by telephonic meeting or consent evidenced in writing or e-mail, or such other means that the Legal Committee shall determine to be useful or appropriate.

CARRIED UNANIMOUSLY

10.5. MOTION – Fr. M Sherman / W. Peters: That Mr. Gregory Nescott be appointed the Chair of the Metropolitan Council Legal Committee. CARRIED UNANIMOUSLY

It has always been the goal of the Legal Committee to use its semi-annual reporting opportunities to ensure that each member of the Metropolitan Council is well-informed regarding matters of current legal interest or concern to the Orthodox Church in America, insofar as these matters reasonably relate to the function and role of the Metropolitan Council in the overall governance of the Church, as that role is defined in the Statute of the OCA.

The OCA Statute

Delegates to the 18th All-American Council overwhelmingly adopted the proposed revisions to the Statute of the Orthodox Church in America, in a 473 to 15 vote, during the AAC's Second Plenary Session on Tuesday morning, July 21, 2015. The Revised Statute became effective November 1, 2015. Under the terms of the Revised Statute, the competencies of the Metropolitan Council have been redefined and clarified. Article V, Section 7 of the Revised Statute reads in pertinent part,

“The following matters are within the competence of the Metropolitan Council. The Metropolitan Council shall:

- a. Implement the decisions of the All-American Council and continue the work of the All-American Council between sessions in the areas of its competence;
- b. Assist the Metropolitan and the Holy Synod in implementing decisions within its competence; ...
- k. Initiate, prosecute, and defend all legal matters affecting the interests of the Church ... “

With those competencies in mind, and continuing to follow the mandate given to the Legal Committee in its enabling resolution, the following report presents the current state of various legal issues now confronting the OCA.

1. OCA Statute

Dioceses, Parishes, monasteries, institutions, offices, and organizations of the Church have until December 31, 2017 to conform their governing documents and administrative practices to the Statute.

2. Status of Legal Committee

David Lane of Sacramento, CA joins Angela Parks and Donna Dimitri on the Legal Committee. David was appointed by Archbishop Benjamin to replace Wesley Smith.

3. Standing Committee on Canonical Procedure

To be added

4. Romanian Orthodox Episcopate of America

During their annual retreat held in Michigan on June 19-23, 2017, the members of the Holy Synod of Bishops of the Orthodox Church in America held a special session convening the Synodal Court which canonically deposed the Bishop Irineu [Duvlea], Auxiliary Bishop of the ROEA, from the status and all sacred functions of the episcopacy, removed him from the ranks of the clergy, and returned him to the status of a lay monk.

5. St. Tikhon's Orphanage Property

To be added

6. Other

Respectfully submitted,

Angela Parks, Chair

Department of Christian Education of the Orthodox Church in America
Report to the Holy Synod of Bishops and Metropolitan Council
September 2017

Members

Chair: Matushka Valerie Zahirsky

Mrs. Veronica Bilas, Matushka Myra Kovalak, Miss Maria Proch, Matushka Alexandra Safchuk, Mrs. Jewelann Stefanar, Matushka Christine Zebrun

New Departmental Offerings

--*Study Materials for The Orthodox Faith*: Sets of review questions and answers, with points for reflection, are available for **all four** of the volumes of Protopresbyter Thomas Hopko's revised series *The Orthodox Faith*. The four titles are Doctrine and Scripture, Worship, Church History, and Spirituality. The materials are available for free download, and the Department has already received many reports of their being used and found helpful.

--*Vacation Church School Program*: A five-day program for ages three to grade five, entitled "The Rest of the Story," is available on the Department's website. Department members edited and enhanced this unit which was originally created by Gail McIntyre from St. Michael Orthodox Church in Louisville, KY, and offered to the Department for others to share.

--"*Sisters on the Journey*": A new retreat for women that focuses on saints and women of the Bible as examples for the lives of contemporary Orthodox women. The retreat includes lecture, discussion and personal reflection on a psalm. The day-long program will be offered for the first time this fall at St. Tikhon's Orthodox Seminary.

Work in Progress and Ongoing Work

--Several new materials are now being worked on and will be introduced before or at the All-American Council in July 2018. These include materials about feast days, a fifth in the series of Activity Books produced by the Department, and a Vacation Church School program for third grade to high school.

--With the help of our webmaster John Pusey we plan to use the company Constant Contact as a means of connecting more promptly and frequently with announcements to those on our database, which now numbers approximately 1000.

--The Department continues to offer the retreat "Orthodox Surprises" which shows participants how the Septuagint version of the Bible offers many deep insights into both the Old and New Testaments.

--The Department continues to offer the workshop "Through the Years: Teaching a Single Concept at Various Age Levels" which engages church school teachers in activities that demonstrate how a concept

can be introduced in a child's early years, and then reinforced in following years by teaching it again but with new, age-appropriate lessons and examples.

--Seasonal materials for Nativity Lent will be posted in the fall of this year.

--Materials for the "Hymnographers" project undertaken by the Department of Liturgical Music and Translations have been sent to that Department; more materials are ready to be sent when requested.

--The Department continues to answer inquiries and requests for help concerning church school administration, curricular materials, and other educational matters.

Respectfully submitted,
Matushka Valerie Zahirsky
Chair, Department of Christian Education
Orthodox Church in America

**OCA DEPARTMENT OF CHRISTIAN SERVICE AND HUMANITARIAN AID (CSHA)
SUMMARY REPORT (February 1, 2017 – August 31, 2017)**

Chair: Donna Karabin

Members: Priest Timothy Yates, Popadija Kitty Vitko, Arlene Kallaur, Diana Pasca, Nancy VanDyken, and eight consultants

Diocesan Ministry Network: Diana Pasca (NY-NJ), Krystal Royer (Bulgarian) Skip Mersereau (WDC), Fr. Timothy Yates (DOS), Fr. David Lowell (West), Vera Proctor (Midwest)

Episcopal Liaison: His Eminence, Archbishop Melchisedek, Archbishop of Pittsburgh and W. PA

Ministry Focus:

Parish Ministries, Matthew 25 Charitable Outreach, Senior Life, Family Life

[CSHA](#) promotes compassionate and charitable ministries in all levels of OCA life.

In this 2017 reporting period, Donna Karabin represented CSHA at various events. She gave presentations at the February Metropolitan Council meeting and the March Holy Synod meeting. The opportunities to meet in person are most valuable for introducing department programs and resources with the benefit of discussion and feedback from the hierarchs, clergy and lay leadership.

Matushka Thekla Hatfield extended an invitation to Donna Karabin, to speak at St. Vladimir's Seminary to the women students and seminarian wives of the St. Juliana Society in March. Her presentation on the work of the department and its resources was followed by discussion of parish ministries and the varied roles of clergy wives. While at SVS, Donna met with Fr. Adrian Budica, Director of Field Education and CPE Supervisor, for a discussion on the Compassion in Action Ministry. She also met with Dr. Albert Rossi, long-time supporter of the department and author of several articles in Parish Ministry Resources.

Other events attended were IOCC, OCMC and OCPM gatherings in the Washington, DC area and a visit to Holy Trinity Church in Overland Park, KS with the opportunity to discuss CSHA with Fr. Timothy Sawchak and parishioners.

There have been changes in status in two areas. The first is that of CSHA member, Fr. Timothy Yates, who left St. Basil the Great Orthodox Church in Wilmington, NC for Air Force Chaplaincy Training. His expectations are to continue serving with the department concurrent with his military duties.

The second is CSHA's previously reported plans to host a Parish Ministries Conference this past summer. Locating an available, affordable and suitable site was one of many obstacles in follow through on the plans. CSHA is most appreciative of the support and encouragement of the Most Reverend Melchisedek, the Most Reverend Mark and the Most Reverend Michael during the 2017 conference speculations. Intentions are now focused on a PMC in the summer of 2019.

Parish Ministry Resources (PMR)

Two new articles were introduced in the [Community Service](#) section of [Parish Ministry Resources](#):

[Combating the Storm as a Frontline Responder](#)

V. Rev. Thomas Moore writes about his experience as a parish priest and IOCC Frontline Responder during the tropical storm that devastated Columbia, SC in the Fall of 2015. Parish life at Holy Apostles Church was drastically changed when their facilities served as headquarters for the various ecumenical

volunteer groups who came to clean-up and rebuild. Fr. Thomas recalls the full year of shared labors, "We worked closely together to house, feed, and coordinate workers from every imaginable religious background and age, including two teams of Orthodox Christians organized through IOCC ... Visitors, many of whom had never heard of the Orthodox Church before or thought it was a church for immigrants, were fascinated to visit our services, take tours of the Church, and learn about our beautiful heritage."

[Serving the Poor -- Orthodox Christians Coming Together as Community in Southwest Detroit](#)

The second inspiring new PMR article features Orthodox Detroit Outreach (ODO), an inner-city inter-Orthodox outreach ministry. The Orthodox Churches in and around Detroit, Michigan partnered to establish ODO with SS Peter and Paul Orthodox Cathedral (OCA) as the hub of the ministry. V. Rev. Paul Albert is the pastor and ODO Spiritual Advisor. As Janet Damian writes in the article, "We are working hard at Ss Peter & Paul with a new vision and paradigm of urban ministry for Christians to serve, providing a venue for people who are called to be missionaries in the city through prayer and service."

Additional new articles are in process thanks to the efforts of Arlene Kallaur. Other department members make recommendations on topics, especially Diana Pasca who reports on active innovative ministries. The ongoing work to review and update older articles will benefit by the addition of a professional editor and new volunteer joining the effort this Fall.

CSHA made a request to Ryan Platte for a report of the PMR's on line activity. He provided a twelve month summary by unique page views and raw analytical data with the previous twelve month period also provided for comparison. The data provides insight to the department's promotion of specific articles and also reveals the volume of readers accessing the PMR through independent searches. All eight sections of the PMR saw activity.

The main sources of PMR articles are clergy and lay men and women in local parishes. We encourage rectors and parish leaders to contact csha@oca.org about possible submissions from their communities on any of the PMR themes, e.g. Community Service, Parish Development, Family Life, Youth, Senior Life, Witness and Mission, Stewardship and Theology of Lay Ministry.

Compassion in Action: Parish Ministry Training (CiA)

Fr. Gabriel Bilas, Deacon Michael Schlaak and the core group of volunteers continue in the CiA pilot program at St. Mary Magdalene Orthodox Church in Fenton, MI (Bulgarian Diocese). They make regular visits to a soup kitchen and healthcare facilities such as hospices, a local veteran's hospital and nursing homes. They say that "CiA is made of up individuals who want to practice being 'the gentle presence of Christ' to the suffering in this world. This program allows our parish family an organized place to live out the calling which Christ spoke about in Matthew 25."

Fr. James Parnell and All Saints Orthodox Church in Hartford, CT (Archdiocese of New England) have completed the CiA application process. Nancy VanDyken has been assigned as their mentor for the discernment process and their work on the Development Kit website. Fr. Timothy Yates will later follow with CiA training and mentoring.

Compassion in Action is being explored by St. Mark Orthodox Church in Bethesda, MD (Archdiocese of Wash., DC) with clergy support from Fr. Gregory Safchuk and lay leadership from Skip Mersereau.

CSHA and Fr. Steven Voytovich (Institutional Chaplains) are planning for Mentor development to support the potential growth of parish programs in other dioceses. Read the [Compassion in Action Brochure](#).

Orthodox Living Will – Advance Directives for Healthcare and Funeral Care

CSHA continues to promote the two documents offering an Orthodox Christian approach to living wills and end-of-life issues. OCA dioceses and their parishes are encouraged to post them on their websites to make them accessible to clergy and laity of all ages. Of note, His Beatitude, Metropolitan Tikhon requested several sets for use by retired bishops and others. The documents are found on the OCA website and here:

- [A Gift for my Loved Ones](#) includes a Health Care Power of Attorney and Advance Directive for Health Care—Living Will.
- [Another Gift for my Loved Ones](#) This package contains everything necessary to know to arrange a burial and funeral—an Advance Directive for Funeral Care.

Diocesan Ministry Network

CSHA has six representatives serving as liaisons between the department and their dioceses to exchange program information and resources. Popadija Kitty Vitko met in the summer with Matushka Vera Proctor from the Diocese of the Midwest. The dioceses of Alaska, Canada, Eastern PA, New England, Western PA and the Albanian and Romanian dioceses are invited to appoint representatives. Sharing the Good News of successful outreach and ministry programs will build up new parish initiatives throughout the OCA.

Church World Service (CWS)

The department continues to promote CWS programs, e.g. CROP Hunger Walks & Gift of the Heart Kits (with IOCC) as part of the longstanding relationship in humanitarian efforts. The CSHA budget allows for an annual \$500 donation to CWS. Arlene Kallaur expressed her concerns with the increased numbers of refugees coming from various countries needing assistance. She said that in spite of diminished funding, CWS and other agencies continue to settle refugees who have completed the vetting process.

Communications

CSHA's internet presence through its Facebook page is kept active. PMR articles, department resources and charitable outreach programs by parishes and Orthodox agencies, e.g. IOCC, FOCUS, OCPM, are featured in postings. The number of people reached, the number engaged and the number of "Likes" is growing. We invite members of the Holy Synod and Metropolitan Council to visit [OCA Parish Ministry](#).

News features on the homepage of the OCA website have included the announcements of the new PMR articles and Prison Ministry Awareness Sunday with links to nine PMR articles.

CSHA member, Nancy Van Dyken, has designed a template and set up a MailChimp email service to share CSHA news of resources, ministry developments and events with the faithful. The email list has been finalized and awaits completion of content by CSHA members for the first issue with a target date in mid-September.

2018 19th All American Council Planning

CSHA eagerly anticipates the opportunity to host workshops and a display at the 19th AAC.

The Orthodox Church in America
Department of Continuing Education

V Rev Ian G Pac-Urar, PhD, Director

The Department of Continuing Education reports directly to the Holy Synod of Bishops, carrying out the Holy Synod's mandate to provide for the ongoing development of clergy and lay leaders.

Five-Year Curriculum

The Department has developed a five-year sequence of short courses in Professional, Legal and Ethical Topics. These courses were presented to OCA clergy over the past five years and are now available online for on-demand viewing, for use in facilitator-led groups and classes, or as live presentations.

The Department will recommend to the Holy Synod of Bishops that all new OCA clergy be required to complete the sequence in the first five years of their pastorates.

Year 1: Professional, Legal and Ethical Dimensions of Clergy Sexual Misconduct

Sexual misconduct is one of the most destructive forces in the Church. This course examines the nature of the pastoral relationship, and surveys the ethical, professional, legal and interpersonal issues involved.

Year 2: The Church and the Law

Clergy must be able to see the law as an ally rather than an adversary. This course provides an overview of the relationship between the Church and American civil law.

Year 3: Parish Advancement: The Stewardship Model

Parish Funding was identified as a top priority in the 2013 Needs Assessment. This course surveys the scriptural foundations of stewardship and offers practical tools to promote stewardship in parishes.

Year 4: Professional, Legal and Ethical Dimensions of Working with Addictions

This topic was identified as a top priority in the 2013 Needs Assessment. With the rise of the national opioid addiction crisis, pastors must have basic pastoral response tools and skills. They must know the limits of their own expertise and understand when to engage clinical specialists.

Year 5: The Pastoral Life Cycle

This course was developed out of a felt need for working clergy to understand their own developmental cycles as pastors. Models of the clergy life cycle are presented, with exercises for proactive engagement with the future.

Clergy Peer Learning Groups

The Department cooperates with the Department of Pastoral Life to promote and facilitate Clergy Peer Learning Groups. Clergy may report their Peer Learning Group hours for Continuing Education credit, although this does not supplant such

continuing education as may be required by the Holy Synod or the Diocesan Bishop. More detailed information is available from the Department of Pastoral Life.

Looking Forward: Challenges

Compliance: The Department continues to work for full compliance by clergy and bishops. We look to the success of those dioceses that provide a full twenty-hour program annually as inspiration for those that still struggle to do so.

Funding: The Department remains underfunded, largely due to under-compliance.

Time: Constraints imposed by the existing levels of funding and staffing mean that insufficient time and manpower is dedicated to the work of the Department.

Looking Forward: Opportunities

Cooperation with other providers: The Department presently works together with dioceses and seminaries, and employs presenters from outside the OCA to provide educational experiences for clergy. These efforts bring opportunities for mutual learning and growth, and are *de facto* areas of inter-jurisdictional collaboration.

Parish development: While current offerings, especially in the area of small parish development, are excellent, there is a vast, unexplored field of specific skill sets and approaches to parish growth that need to be nurtured in clergy and lay leaders. Offerings might include in-depth training and coaching for parish level, lay leaders in youth work, Bible study, stewardship and group dynamics.

In-Church expertise: The level of education and expertise among OCA clergy and faithful far surpass that of a few generations ago. This offers the opportunity to engage our own people in providing educational experiences, while it presents the challenge of identifying and recruiting those people.

Looking Forward: Goals

The Department has identified the following goals for the near term:

1. *Build compliance* by improving and intensifying communication with diocesan bishops, clergy and parish leaders.
2. *Build online delivery* by continuing to collaborate with other entities.
3. *Enhance learning materials* for the existing Five Year Curriculum, and seek to have the curriculum required of all new OCA clergy.
3. *Begin training in Bible Study leadership for clergy and laity.* This was identified as a top priority in the 2013 Needs Assessment.
4. *Begin Lay Leadership Development* by offering Bible Study training first, and simultaneously conducting a Lay Leadership needs assessment to identify further areas of study.

Department of Evangelization
Priest John Parker, Chair
Report reviewing Spring/Summer 2017

Planting Grants

St James, Beaufort, SC;
St John the Evangelist, Tempe, AZ;
St Nektarios in Waxahachie, TX;
St Juvenaly and His Companion, Wasilla, AK.
Annunciation Mission, St James, MO

As of this report: reviewing Planting Grant applications which are due on August 31. Two parishes will graduate the grant in December: Tempe, AZ, and Beaufort, SC. St Katherine's in Encinitas, CA, graduated mid-year (June) as they began mid-year, three years ago. Parish was gifted a hand-painted icon (Petro Lufta, iconographer from Holy Resurrection Cathedral, Tirana, Albania) of the Equal-to-the-Apostles Evangelizers at a personal meeting with Fr Andrew Cuneo in California on August 21, 2017.

Grant Retreats

Fr Jason Foster gave a Grant Visit to St John the Evangelist, Tempe, AZ, on June 21, 2017.

I have met on several occasions for formal and informal discussions with Fr James Bozeman, St James, Beaufort.

Diocesan Work

- Diocese of Western PA: formal conversations with His Eminence, Abp Melchisedek concerning clergy brotherhood and evangelism.
- Diocese of New England: in/formal conversations with His Eminence, Abp Nikon concerning implementation of a Revitalization Grant, perhaps to be offered as soon as January 2018.

Teaching/Retreats/Talks

- Taught at 3rd Annual OCA Missions School, Long Island, NY; August 23-25, 2017.
- Led Retreat for Holy Ascension Antiochian Orthodox Church, West Chester, PA, March 23-25.

Assembly Evangelization Study

Finalized my portion of Assembly's study on Evangelism. Study was published on April 24, 2017: <http://www.assemblyofbishops.org/news/2017/evangelization-study-report>

Gave interview for an ecumenical study on Orthodox Parishes and Spiritual vitality.

OCCMC

Attended board meeting April 24-26 in St Augustine, Florida.

International

- First-Annual Pilgrimage, Department Co-sponsored with Archbishop Michael and Diocese of NY/NY—to Holy Land. June 4-16. Intention is to build pilgrimage each year, to live the Living Tradition of the Church, and to see the connection between our Church and the wider Orthodox World.
- Significant, in-depth conversations, with the blessing of the Patriarch of Jerusalem, regarding the possibility of short-term mission teams from the USA (OCMC, OCA) for the purposes of direct evangelism in Jerusalem, Youth and Campus Ministry, Pastoral/Educational support of local Clergy, and the provision of Arab-language materials for the local churches.

Correspondence and Conversations

Sporadic emails from inquires (both individual, and for church-planting requests). Ongoing in some cases; Church planting requests are farmed to nearest OCA dean.

MEDIA

Monthly (scheduled) posts on oca.org—from each of the Planting Grant Missions.

Website

Preparing for overhaul of www.goodnews.oca.org. First-stage conversation with Fr Joel Weir to manage the site.

Ancient Faith Radio

Re-launched podcast with new focus on Discipleship and deepening our spiritual roots. Ancient Faith Radio: Lord Send Me

Orthodox Christian Network (OCN)

Occasional essays for OCN

5 Sees

Reviewed the film “Becoming Truly Human” and formed a small committee of Mission Grant Parish Priests to review the film; fostered inter-Orthodox Cooperation for the viewing and distribution of the film. Proposed OCA financial support for the production company to produce further films which foster evangelism among millennials, nones, and dones.

OUTREACH EFFORTS

Saddleback Church/Megachurch Pastors

Attended and participated in a gathering of 55 of America’s largest megachurch pastors at Saddleback Church on Monday, August 21. Offered an Orthodox Christian perspective (alone among 45 non-denom pastors) on Racism/Bigotry. Personal meetings with 4 of the pastors for ongoing conversation about Orthodoxy.

Anglican Church in North America

Meeting postponed to to scheduling conflicts among the Anglicans.

Planting Grant Recommendations
Calendar Year 2018
Priest John Parker
Chair, Department of Evangelization

Summary

TOTAL PLANTING GRANT REQUESTED FOR 2018: \$100,000

TOTAL RETURNING: \$80,000

USA: \$52,000

\$20,000	Rolla, MO	Diocese of the Midwest
\$16,000	Waxahachie, TX	Diocese of the South
\$16,000	Wasilla, AK	Diocese of Alaska

NEW in 2018: \$48,000

USA: \$48,000

\$24,000	<i>St John of Chicago</i>	Rogers, AR	Diocese of the South
\$24,000	<i>St Nikolai</i>	Louisville, OH	Bulgarian Diocese

Three new grant applications, three returning applications. New applications from:

Diocese of the South: 2

Bulgarian Diocese: 1

Explanation of Recommendations—Returning:

Annunciation of the Virgin Mary Rolla, MO
Diocese of the Midwest Fr Joel Wilson

Annunciation is a very vibrant mission with an active liturgical life and a commitment to beauty. Planned visit Winter 2017/2018. Recommend second year grant.

St Nektarios Waxahachie, TX
Diocese of the South Fr David Bozeman

St Nektarios Mission has been capably pastored by the talented Fr David Bozeman. Recommend to receive third and last year grant.

St Juvenaly and His Companion Wasilla, AK
Diocese of Alaska Fr Mikel Bock

St Juvenaly is stable. News from last year's visit from Fr David Rucker indicate that there are many adjustments that can be made at St Juvenaly that may fare them better (attitude against congregational singing at all, for example). St Juvenaly has a strong and active prison ministry. Recommend to receive third and last year grant.

Explanation of Recommendations—New:

St John of Chicago Rogers, AR
Diocese of the South Fr John Wehling

St John's applied last year, but was just an edge weaker than Annunciation in Rolla, who received the only grant last year. Fr John had been splitting his time between two missions, and this year served just

Orthodox Church in America
Department of Liturgical Music and Translations
Report to the Holy Synod and the Metropolitan Council – Fall 2017

A. Music Downloads

Continuing the project of making available music for the Lenten Sunday evening Vespers, the Department posted 46 pages of music for the saints commemorated on the 1st, 2nd, 3rd, 4th, and 5th Sunday evening Vespers in 2017; in addition to 20 pages of the penitential stichera in Tones 6, 7, and 8 for Sunday evening Vespers.

As indicated in the 2016 report of the Department, we began to scan and make available on our website music for the feast of the Nativity of Christ, taken from the booklet published by the Department of Liturgical Music in 1987. We hope to complete this project in 2017.

The services (music setting of all sung parts plus texts of prayers and litanies) for Baptism, Matrimony, and the Burial of a Priest have been completed and posted on the website. This year the Department is in the process of completing the music setting of all sung parts plus the texts of prayers and litanies for the Burial of a Layperson. This project is in its final phrase as approximately 100 pages of music and texts are currently being proof-read. It is expected that this service will be posted on the website before the end of the current year.

Texts that are set to music and posted on the website are reviewed, corrected, and revised when necessary by competent translators who are fluent in Greek, Slavonic, and English. Translators include Father Benedict Churchhill, Dr Elizabeth Theokritoff, and Archimadrite Juvenaly (Repass). Proofreading and grammatical corrections are done by Dr. Vladimir Morosan. Setting of music in *finale* is done by Deacon Gregory Ealy, Dr Vladimir Morosan, Fr Lawrence Margitich, Kevin Lawrence, and others.

A major goal of the Department of Liturgical Music and Translations is to provide the necessary musical resources for a parish choir in order to be able to chant the responses to all the liturgical services that are called for in the Typikon and celebrated in the local church. These musical resources are posted on the website of the Orthodox Church in America and made available as a free download. Approximately 200 pages of music will be added during 2017, bringing to a total of more than 6,300 pages of music available on the website of the Orthodox Church in America for free downloading and use by our choirs and singers.

B. Texts for Liturgical Services

As of August 31, a total of 123 liturgical services containing the so-called *Propers* of Vespers, pointed to be sung according to the Common Chant, has been posted on the website. By the end of the 2017 calendar year, this number will increase to approximately 200. These include services for all feasts and saints that call for a Vigil in the “official” Liturgical Calendar, in addition to the services of the Presanctified Liturgy during Lent, the services of Holy Week, and the services of Great Compline, Vespertine Liturgy of St Basil the Great, and Matins for Holy

Saturday, the Nativity of Christ, and the Theophany (with the Great Blessing of Water). These services are put together by the Chairman, rubric outlines are provided by Archimandrite Juvenaly and the texts are proofread by Dr. Vladimir Morosan. As in the past year, two versions, TT (Thee/Thou) and YY (You/Your) for each posted service are regularly provided. Dr Vladimir Morosan is responsible for the adaptation of the TT texts.

As the postings are in Microsoft Word, the texts can be downloaded and then easily adapted for local and particular use. These texts are not only being used by choir directors and singers, but many parishes are making them available for non-singers so that worshippers who do not sing in the choir can easily follow the texts as they are being chanted during the services.

C. On-line Course in Choral Conducting

For the sixth consecutive year the on-line course for Beginning Choir Directors will be offered by the Department to interested and beginning choir directors. The course will begin on September 11 and include 12 (twelve) weekly sessions, each session consisting of both video and textual teaching demonstrations to go along with daily exercises and weekly assignments. As in the past, each student will be required to meet weekly on-line via the *skype videosystem* with the teacher of the course, Prof David Drillock. Following each skype session, written evaluations will be presented to each participant. Registration for this year's course was posted on the website on August 9 and was over-subscribed and closed (with 14 registrants) on August 23.

The first part of the course places special emphasis on the relationship between text and music, accented and non-accented syllables; exercises are focused on learning the beat patterns. The second half concentrates on techniques of conducting chant, singing in phrases, analyzing examples of both metered and unmetered music, and preparing the music for conducting.

Music examples used in the course were sung by choir members of St Paul Orthodox Church, Dayton, Ohio. Video recording for the sessions was done by Dr Mark Pearson. Dr Pearson, formerly Instructional Technologist and Designer at Earlham College, also designed the course, using the Moodle Learning Management System, and provided technical support and program assistance throughout the twelve sessions.

Respectively submitted,

David Drillock, Chairperson
Department of Liturgical Music and Translations
Orthodox Church in America
September 4, 2017

Department of Pastoral Life

The Department of Pastoral Life is charged with examining, identifying, and working to resolve those topics of concern and need that arise in the lives and ministries of the Orthodox Church in America's clergy and clergy families. This broad call routinely comprises both projects of perennial, general attention as well as areas of particularly assigned exploration and elaboration made at the behest of the Holy Synod. Because it is at that place of vocation for the Church's priests, deacons, and their families that the Church qua institution consistently intersects with the lives of the faithful, the work of this department is sometimes more varied than comfortable. The needs of the laity and the needs of those who would or do serve them cannot help but be diverse, many, and challenging. Thus, the work of the Department of Pastoral Life, occasionally seems broad, the problems presented it for attention and resolution sometimes strangely mixed for fixing, yet little by little, with devoted consistency, the members of this department strive so to do.

After a process of recruitment and interview, Fr. Kirill Sokolov eagerly agreed to assume a supervisory role overseeing composition of new clergy guidelines for the OCA, the previous version of these left largely unaltered since their drafting in 1998. In compiling this guide, we seek to meet two outstanding needs. First, this will be an educational resource for those who are preparing for or newly engaged in parish pastoral practice. Second, it will be a reference for those who already serve in that capacity, replying to some of those irregular situations that do occasionally arise and answering these needs with the accrued insights of others' experience. In preparing this document, attention to the subtleties of difference and the breadth of practices present within the Orthodox Church in America will be included. In this diversity, the OCA should be justifiably proud, encompassing, as it does, numerous ethnic, regional, and historical backgrounds, perhaps more so than any other Orthodox jurisdictions extant on this continent. The new clergy guidelines will express the harmony of this difference, coupling it with practical strategies for implementation.

Moral, spiritual, and material support for clergy wives has been raised repeatedly as a subject long overdue for attention, yet securing a means for such inquiry has historically proven to be a challenge. The voices of clergy wives need badly to be heard, but a mechanism which assures trust and confirms a certain confidence to these conversations has, heretofore, been lacking. As this department has, from its most recent revival, remained committed to listening first, we are very glad at last to be making some progress in this area. A first series of private interviews with clergy wives is now underway. Once completed, these findings will begin to fill in this previous deficit of knowledge with concrete details which can then guide strategies of redress.

Answering a call from both diocesan and seminary leadership, the department is now at work on a project of bringing together data to assess the needs of the Church for future clergy. This clergy projection will evaluate present numbers of parish priests, their statistically likely retirement dates, and superimpose these findings against current and future diocesan expectations of anticipated pastoral openings and placements. To the best of our knowledge, this is a first in the history of the OCA. The mechanisms for this process are simple: a short questionnaire to be completed by the bishop or his chancellor and some crunching of the OCA's databases. As the so-called 'baby-boomers' age and may be inclined to move from active ministry, there is some concern at finding adequate numbers of candidates to succeed them. This new tool will give Church administrators an additional perspective with which to plan; it may also highlight the

need to secure future vocations and, thereby, provide the seminaries with a better picture of the Church into which they will be sending their graduates.

The HOPE (Honoring Orthodox Pastoral Excellence) Program, an initiative of the Diocese of Eastern Pennsylvania, continues in its work of supporting priests and their wives by offering them constructive and intentional venues in which to explore the challenges of their lives and vocations. Meeting, at minimum, four times per annum and each of these sessions with a trained, vetted, and paid facilitator, such groups have proven to be a rewarding routine for their participants, providing them with the comfort of a safe place in which to speak and be heard, to offer and to receive from the benefits of supportive community. Although centered in Eastern Pennsylvania and benefitting from the generous support of that diocese, these groups are open to and utilized by clergy and clergy wives from numerous dioceses both within and outside of the OCA. More groups are planned as the interest in this program grows, and the training of facilitators to serve those who do not live in the northeast region of the United States is now becoming a marked need—one which the directors of this program look forward to resolving in the coming months.

As sexuality and sexual identity continue to be more pronounced and discussed topics of the moment, the Holy Synod requested an opening examination on the pastoral responses to these timely concerns. After a series of interviews with the members of the Synod, a paper for their review is now in preparation addressing this. This document does not seek to espouse any particular way forward but to elaborate the need and to provide an introductory summary of what are now the expected, projected, and practiced responses within the OCA.

The departmental committee was asked to explore the idea of a clergy mutual aid fund. This would be a resource to augment those other forms of support that exist within parish, deanery, and diocese but which are found at times to come to the end of their abilities while needs still remain. In essence, it would function as an additional safety net for clergy and clergy families that would come into effect when others have been exhausted. Though the precise parameters for its use are still nascent and under discussion, some proposed utilizations have been for funeral costs, medical bills, counseling services, and emergency housing. Simply put, these dire needs continue to exist within the Church and there seems little chance of their abatement soon. A fund such as this, particularly if administered by clergy and for clergy, could offer some assistance, helping brothers in Christ and in service help brothers in Christ and in service. A preliminary proposal is slated to be presented to the Holy Synod at its next meeting.

After a review of clergy compensation policies published by dioceses of the OCA and after consideration of the great wealth of anecdotal accounts of these policies' implementation, the departmental committee has with great enthusiasm and excitement observed the Diocese of the West engage in a detailed, comprehensive, yet pastorally sensitive examination of its own clergy compensation practices. Fr. David Lowell continues to guide that process there, but the pastoral life department has requested that he also help distill both his findings and his technique into a program of self-assessment in which other dioceses may engage. He will be addressing the next meeting of gathered OCA chancellors and treasurers this fall. Additionally, although the 1995 OCA clergy compensation guide still retains much of its initial merit and wise counsel, there yet remains a gap between the principles it outlines and the Church's practices. Although the assignment of clergy and their maintenance remains explicitly a matter for local hierarchs, chancellors, and deans, the department is exploring ways to aid all involved in making this a more consistent process and one in which clergy feel they have a voice. Bluntly, too numerous are the voiced concerns from priests and their families that the communities they serve need

encouragement to help look out for the interests of their pastors, supporting them ably so that they can continue in that work to which God has called them.

“Discerning Celibacy”, a paper prepared last year and delineating issues of celibate clergy within the OCA, was presented to the Synod. Since that presentation, the plight and support of these clergy has remained an ongoing topic of conversation and concern.

The Department of Pastoral Life committee meets monthly via telephone and videoconference. His Grace, Bishop Paul, is the episcopal liaison, Archpriest John Jillions, the departmental chair, and Priest Nathan Preston, the administrator of the department. The hardworking and generous-with-their-time members of this committee are Archpriests David Lowell, Dennis Rhodes, Gregory Safchuk, Nicholas Solak, and Stephen Vernak, and Cindy Heise, LSW; great thanks is due to them for their patience and commitment.

Respectfully submitted,
Rev. Nathan Preston

Orthodox Church in America - Department of Youth, Young Adult, and Campus Ministries
Fall 2017 Report to Holy Synod and Metropolitan Council

His Grace, Bishop David, *Episcopal Liaison*
David Lucs, *Temporary Administrator*
Priest Christopher Rowe, *Department Project Manager*

Introduction

On May 11 of this year, I was appointed the temporary administrator of the Department by His Beatitude, Metropolitan Tikhon, to succeed Andrew Boyd, the previous director.

I would like to begin this report by humbly expressing my gratitude to God for this opportunity to serve in His Church, and to His Beatitude for placing his trust in my abilities for this appointment.

His Grace, Bishop David has been an outstanding mentor, always thinking of what is in the best interest of our youth when providing guidance and feedback to ensure a firm foundation as our Department team starts this new chapter of ministry.

Over the past four months, I have learned a lot about recent and ongoing programs and projects from Fr Christopher Rowe, our Department project manager. He is an invaluable source of insight on many topics and I hope will continue to serve the Department in many ways. Archdeacon Joseph Matusiak has not only been instrumental in strengthening connections both nationally and internationally for future Department work, he has provided valuable counsel to ensure our Department aligns with His Beatitude's four pillars, the mission and vision of the OCA, and connects with other Departments and Commissions.

Finally, I would also like to express my gratitude to Andrew Boyd along with the rest of the past directors, chairpersons, interns and volunteers of the Department, whose love of the church and youth has provided us with the wealth of resources and experiences, and expectations for this Department.

Department Work

As we begin writing this new chapter for the OCA's Department of Youth, Young Adult and Campus Ministries (YYACM), I want to provide you with an overall assessment of the Department's work, which makes this report longer than normal or future reports I will submit. It will include updates for each project, organized in four categories: Content, Staffing, Events / Programs, and Inter-Orthodox Relations.

My prayer is that the following information about the work accomplished over the past four months will inspire you to greater support, funding, and involvement to help young people across the OCA to draw closer to God through the events, activities and resources provided by the Department.

In Christ,
-David

Content

- A **Master Calendar** was created to help the Department work strategically while creating and providing content in a timely and proactive manner as it potentially relates to: major feasts, fasts, saints, civil holidays and commemorations, annual and floating OCA events, non-OCA events/activities, and youth-specific events.
- The Department continues to have a presence on **Social Media**, however the focus has shifted from **Facebook** and **Twitter** to specific **Instagram** postings designed to generate followers among our target age groups (15-25). Those postings are then shared to Facebook and Twitter. These postings have resulted in nearly 200 new followers on Instagram and between 250-2,500 views on Facebook.

A **Pinterest account** was opened for the Department and each of the existing YYACM accounts were reviewed for consistent branding and messaging. The passwords now meet security standards to ensure a higher level of safety for youth who connect with the Department on social media. More refinements will be taking place in the coming months.

The **YYACM Facebook page** has been officially verified by Facebook meaning we're a recognized youth organization (and not an individual with a general Facebook account). Having a verified account has the potential to help raise our presence in search results and as a valid representative of a church youth organization on Facebook.

The existing social media team has not met recently, but will have an informal conversation before the end of the year to plan for 2018.

- The **wonder Blog** website continues to host new content, generated by a variety of individuals – both clergy and laity – who are writing short reflections on current events and timely topics geared for our target audience of teens and young adults.

Rebekah Moll, a parishioner of St. Mary's Cathedral in Minneapolis and new Department member has been appointed Content Manager for the blog, aligning topics with the YYACM master calendar to solicit, edit and post reflections.

New **Reflections** are being posted on a near-weekly basis, instead of en masse once a month. Once posted, the reflections are then featured on the YYACM social media pages to drive traffic to the content. The ability to comment on the blog has been deactivated, and our goal is to eventually incorporate previous blog postings and new reflections into the Department's future web presence.

- Extensive planning and work has been under way over the past three months to develop a new stand-alone **YYACM Website** designed for youth and young adults ages 10-25. The site will be reflect our mission of serving young people across North America from diverse backgrounds, while providing a cohesive, attractive, and engaging website that draws them in without being too radically at odds with the OCA's more conservative position.

The site will begin with three main components:

- **Today in Orthodoxy** – a calendar of feasts, saints, historical events, daily scripture readings and curated social media postings which use the hashtag #iamorthodox
- **Reflections** – content from the former **wonder blog** along with new articles and reflections curated by our content team.
- **Perspectives** – a series of thematic videos and articles produced on a seasonal basis in a mini-series format. Possible topics include: sacraments, North American saints, etc.

Additional content including resources for the 19th AAC youth program will be built in over time, based on current events, and the needs of and feedback from youth and young adults who will be engaged in use testing.

The current YYACM web presence (oca.org/about/departments/youth-young-adult) will be maintained in some form with the wealth of resources and content for youth ministry activities.

- The use of **video** is an area of content development which has great potential to engage young people. The medium could be used for education, entertainment and outreach to Orthodox and non-Orthodox youth alike.

Two initial short-format projects are in currently discussion – The **ABCs of Orthodoxy** – a series of 3-4 minute live-action videos/reflections on different topics organized by their first letter. The second, is the creation of a 3-4 minute animated iconographic videos recounting the **Lives of the North American Saints**.

It's also possible to create **podcast** versions of informational/education videos for downloadable listening by youth and young adults for daily content access from the Department. Both video and podcast resources will need financial grants or dedicated funding to move into the initial phases of production.

- While much content has been produced by the Department over the past four decades, the most popular being in the form of two magazines: **On the Upbeat** and **Young Life**. Evergreen content from past issues of Upbeat in the mid-1980s has been scanned as readable text, and is ready for editing, formatting, and placement into new resources from the Department.

Initial discussions with representatives of the Youth League for the Orthodox Church of Finland resulted in ideas for possible collaboration of creating an English language version of the Finnish magazine *Candlelight* which is published quarterly for elementary school aged children. The project, if realized, would be the first of a re-established working relationship between the Finnish Orthodox Church and the OCA.

- The Department is willing to partner with the Department of Christian Education to develop **educational resources and curricula**. Department members are already involved with the church school program at St. Mary's Cathedral in Minneapolis and partnering with staff to explore ways to leverage existing curricula and for the development of new resources including **vacation bible programs** and **camp** curricula.

As the Department reorganizes and expands the available resources, one goal is to serve as a clearing house for camp curricula and vacation bible program content. This would help smaller and larger parishes alike, by providing curated Orthodox educational resources and programs which could be '**plug n' play**' saving time and effort in developing excellence for summer church experiences for young people.

Staffing

- In the summer of 2017, the Department had a **seminarian intern** work with the temporary administrator to develop resources and plans for future YYACM projects. Alexander Norton, a first year student at St. Tikhon's spent two months in Minneapolis, working on a variety of content related projects. He also had the opportunity to work first-hand with clergy at St. Mary's Cathedral, within the Minneapolis deanery, and those from other local Orthodox churches.

Alex spent a week at the cathedral's Vacation Bible School, a week at the pan-Orthodox summer camp with nearly 200 youth, a week with the **IOCC Serv-X-treme** participants from across North America, volunteered at the local FOCUS North America center, and engaged in parish life at the cathedral.

The experience was beneficial for Alex's growth and development as a seminarian and possible future leader in the church, for the Department and its pending projects, as well as for St. Mary's community, to have the opportunity to meet and connect with a seminarian.

A goal for 2018 would be to have at least one seminary intern for the summer, and possibly additional support staff for the **19th All-American Council** in St. Louis, MO.

- The Department has representation from nearly every OCA Diocese, however there are a number of open positions. A goal for 2018 would be to have **diocesan representatives** from across the OCA, and not in name only, but those who would be willing to collaborate, work on shared projects, eliminating duplicate efforts, and partner on key initiatives for greater awareness by youth and young adults of available programs and resources from the Church.
- Like diocesan representatives, the Department is looking to engage with individuals who are interested in working on projects outlined in this report. **Members of the Department** are encouraged to see their role as being actively engaged in the ongoing development of resources and programs which can be made available across the continent, and more importantly, used locally. To accomplish this, more volunteers are needed.
- The broad spectrum of projects and resources outlined in this report require **Project Leaders** to ensure their ongoing development and distribution. Likewise, the creation of a **Content/Speakers Bureau** would enable the Department to field questions and requests for speakers and presenters who can be invited to attend or lead local events.

Currently, such a resource doesn't exist, which limits how the Department can support or be involved with local parish youth events or programs.

- The role of a **National Director** for the Department of Youth, Young Adult and Campus Ministries is one which needs to be further developed and defined. The need to maintain

communication with representatives from each diocese, other Orthodox jurisdictions across North America, as well as attend and participate in national and regional events makes it vital to have someone with the right skills, education and experience to effectively represent the Orthodox Church in America and the YYACM Department.

Ideally, the Director would have at least some seminary educational experience, youth leader training, experience as a parish or diocesan youth leader, and the ability commit at least 15-30 hours a week to the needs of the Department.

Department Events / Programs

- Plans for the **Youth Program for the 19th All-American Council** are being organized under the leadership of Priest Benjamin Tucci of Minneapolis. Father Ben has been coordinating efforts with Dn. Peter Ilchuk and members of the Pre-Conciliar Commission to ensure a dynamic and engaging program for youth in Kindergarten through 11th grade.

The program will be centered on the theme of “For the Life of the World,” and explore the sacramental life of Orthodox Christians and how young people can be in the world but not of the world. Morning sessions will focus on educational opportunities, including a **Teaching Liturgy**, while the afternoon sessions will include activities in and around St. Louis.

Building upon the success of previous AAC youth programs, including the Atlanta AAC and leveraging the proximity of St. Louis to other metropolitan areas, our goal is to at least double the number of youth participants who attended the 18th All-American Council in 2015 (approximately 75.)

- The **St. Peter the Aleut Grant** program continues to provide opportunities for young people to apply for financial assistance to attend youth events. A number of individuals have received grants in 2017 to attend the recent **Syndesmos** gathering in Samos, Greece, camp programs and retreats from Alaska to Florida, and music and training programs hosted by OCA parishes and other Orthodox communities.

The Grant program will be undergoing a thorough review and restructuring in 2018 to streamline the application process, ensure accountability for recipients and to raise awareness of this generous program enabling young people to attend events they might not otherwise consider attending.

- The **St. Peter the Aleut Award** was established in the late 1990s as a to recognize and celebrate youth who participated in social responsibility projects or organized activities which benefitted their local communities.

It is hoped that in 2018, the Award program will be reviewed and restructured to provide young people across the OCA with an opportunity to receive credit and recognition for their service and contributions to help others in their local communities.

Inter-Orthodox Collaboration

- The Department is committed to greater collaboration with the other **Departments, Boards, Commissions, Committees and Offices** of the Orthodox Church in America to partner on projects, developing resources and opportunities to share costs and efforts.

In particular, my initial contact with the **Department of Christian Education** has been extremely positive, and despite the difficult circumstances the members of that Department face, we look forward to partnering on a new of projects in the coming years.

- The Department will also work to partner with faculty and staff at our three **seminaries**. For instance, Department member and Diocesan Youth Representative (New England), Archpriest John Hopko will be leading the Teen Retreat at the annual Education Day on the **St. Vladimir's Seminary (SVS)** campus in early October. Our hope that this is but the first of many opportunities for greater collaboration with SVS, and St. Tikhon's, and St. Herman's Seminaries for youth programs, activities and resource development.
- The Department is faithfully represented by Deacon Alexander Cadman at the national **Orthodox Christian Fellowship (OCF)**. His involvement provides us with a capable voice and effective communicator to ensure the OCA has a respected and engaging presence at the table.

The OCA provides some of the strongest support for the national OCF program by any of the local Orthodox Churches in North America. Our financial commitment and support as contributors to programs and resources provides a balanced and focused vision for the future of campus ministry. Our hope is to nurture this relationship further, which can only help our young people remain committed to the Faith during this critical period of their lives.

- The Department looks forward to re-energizing its relationship with the **Fellowship of Orthodox Christians in America (FOCA)**, partnering on common events and opportunities for young people to remained engaged and involved in the life of the Church. The FOCA's annual "*Celebrations of Faith*" art contest, sporting events, and annual convention are a few examples of opportunities to bring Orthodox youth together for fellowship and spiritual nourishment.
- Father John Bacon continues to represent the Department at the national level of **Scouting programs**. It is hoped that in 2018, the Department will be able to feature more information and resources about Orthodox Scouting badges, awards and opportunities for those involved in local Scout programs such as the Boy Scouts, Girl Scouts and Sea Scouts.
- With the North American regional office for The **International Orthodox Christian Charities (IOCC)** based in Minneapolis, the Department hopes to strengthen and nurture plans and collaboration on future projects such as the Serv-X-treme retreat.

As noted above, Alex Norton, this year's seminarian intern served as a counselor for the program, and was impressed with what the youth accomplished. Participants must be nominated by their diocesan hierarchy, and a number of OCA youth participated in the event.

Future opportunities to support the good work of IOCC across the continent will enable youth and young adults to serve their neighbors locally, as well as international opportunities.

- Like IOCC, a local **FOCUS North America** chapter exists in Minneapolis, led by Vera Proctor, who's husband Archpriest Jonathan Proctor is rector of Holy Trinity Church, St. Paul. The established relationship between myself and Vera has the potential to lead to greater collaboration at the local level, as well as to make connections with those chapters of FOCUS across North America, again providing young people with opportunities to make service projects a regular part of their Christian lives.
- Two members of the Orthodox Church in America attended this year's **Syndesmos** gathering in Samos, Greece at the end of June: Victor Lutes of the Archdiocese of Washington, DC and Anastasia Serdsev of the Diocese of New York and New Jersey. While the frequency of Syndesmos events has decreased in recent years, the relationship and shared mission of both the YYACM and Syndesmos is vital for greater collaboration among young adults at the international level.
- Youth Department directors and chairs from each of the **Orthodox jurisdictions in North America** meet quarterly via teleconference to review a variety of topics and on-going plans for future events.

The leaders also plan and host the annual college conference, the 2018 event to be held Jan. 31 – Feb. 4, 2018 in Atlanta, GA. Topics to be discussed at the fall meeting during the third week of September will include plans for the college conference, an annual Orthodox Youth Day, tentatively slated for February 2018, and the creation of a website to host shared resources for youth workers and leaders.

- In June 2017, while attending the 7th Conference of The **International Society for Orthodox Church Music** (ISOCM), I had the opportunity to meet with Deacon Jaso Pössi, organization secretary, for the **Orthodox Youth League of the Orthodox Church of Finland** to discuss at length, opportunities for collaboration on projects, resource development, and events.

During our meeting, I was also able to speak with His Eminence, Archbishop Leo of Karelia, the ruling primate for the Finnish Church who had signed an agreement with His Beatitude, Metropolitan Tikhon two years ago to encourage discussions like the one I had with Deacon Jaso.

In following exchanges with Maria Kauppila, Youth Director for the Church of Finland, there are opportunities which can be leveraged between the two churches – including camp exchange programs and sharing of resources, like their diocesan youth magazine (referenced above).

While the Finnish Church's Youth Department has paid full time staff members, they are also limited by time and resources to achieve all of their goals as quickly as they want. However, there was a sincere enthusiasm to take advantage of our shared interest in developing common resources for youth and young adults in multiple languages.

**Fellowship of Orthodox Christians in America (FOCA)
Report to the Metropolitan Council
September 2018
Respectfully Submitted by President Marge Kovach**

EXECUTIVE BOARD

Spiritual Advisor - V. Rev. Theodore Boback
President - Marge Kovach
Vice President - Allison Steffaro
Recording Secretary - Danielle Ilchuk
Treasurer - Michael Bowan
Immediate Past President - Becky Tesar

OUTREACH

Gifts of Love:

2017 campaign – raised over \$12,500 for the repair and restoration of the St. Nicholas Chapel, which is part of the Holy Assumption Russian Orthodox Church complex in Kenai, Alaska. This church is one of the oldest in Alaska – completed in 1896 – and the entire complex (church, chapel, rectory and cemetery) was declared a National Historic Landmark in 1970. The FOCA is sponsored an Alaskan cruise in May with all proceeds going toward the 2017 Gifts of Love campaign.

Seminarian Assistance Programs:

Adopt a Seminarian program - chapters and parishes are providing financial assistance to seminary students in need during this academic year.

St. Nicholas Wish List project – will distribute gifts to the children of married seminarian families at STOTS and SVOTS for St. Nicholas Day. Given the logistics, gift cards will be collected and distributed to the families at SHOTS.

Members of our Executive Board plan to visit both STOTS and SVOTS to continue familiarizing these future leaders of our churches with the FOCA, and its goals and mission. St. Tikhon's re-established the chapter in 2015 and had a complete slate of delegates at this year's national convention.

NATIONAL CONVENTIONS

2017 - The 91st National Convention, sponsored by our New Jersey District, was held at the Sheraton Harrisburg/Hershey Hotel in Harrisburg, Pennsylvania from September 1st through the 4th. We are thankful that the FOCA's spiritual leader, His Beatitude, Metropolitan Tikhon, His Eminence Archbishop Michael, and His Grace Bishop David were able to attend. In particular, we are grateful for the letter issued by His Beatitude in support of the goods works of the Fellowship of Orthodox Christians in America. The convention weekend events included business session as well as a number of opportunities for fun and fellowship such as the President's golf outing and a live performance by the Tamburitians, a multicultural song and dance company. Area Clergy and faithful joined the Saturday evening Vespers at the hotel. Sunday Hierarchical Divine Liturgy was followed by a banquet and dance that evening. A youth program included religious education sessions, a trip to Hersheypark, and a service project which involved the assembly of back-to-school bags. Highlights from the weekend also included the presentation of a \$12,500 check to Bishop David and Mrs. Dorothy Gray of Kenai, Alaska from the 2017 "Gift of Love" campaign as well as \$4,000 in educational scholarships.

2018 - The FOCA will hold our 92nd National Convention in conjunction with the OCA's 19th AAC at the same venue in St. Louis, MO from July 20-23. Becky Tesar, Immediate Past President, is representing the FOCA on the OCA Preconciliar Commission.

2019 Convention – Planning is underway for the Ohio District to host the FOCA's 93rd National Convention at the Hyatt Regency Hotel in Downtown Columbus, Ohio over the Labor Day weekend.

JUNIORS

Members of the FOCA Junior Department continue to coordinate our efforts with the OCA's Department of Youth and Young Adults.

Celebration of Faith Contest:

The creative arts contest is open to ALL youth who are communicants in a parish or mission of a canonical Orthodox Church in North America. Participants are encouraged to express themselves by submitting projects within the categories of Literature, Musical Composition, Photography, or Visual Arts.

The 2018 topic will align with the theme of the AAC. Advertising will begin shortly to allow for the contest to be incorporated into Sunday school programs.

Junior Olympics:

Each July we attract Orthodox youth from a number of districts for Junior Olympics, our annual sports camping week, at St. Vladimir's Camp and Retreat Center in Ohio. Record numbers of campers continue to register for the week long session under the direction of Dn. Daniel and Mat. Catrina Kovalak. His Grace, Bishop Paul presented the Kovalaks with a Gramota in recognition of their ten years of service to the FOCA Ohio District camping program. Camp is an excellent opportunity for youth to get away from daily routines and to grow spiritually while living within an Orthodox community. As the campers have said, camp is a place where they feel comfortable just being who they really are; a place where they don't need to pretend to be somebody or explain themselves.

UPCOMING EVENTS:

National Basketball Tournament	April 20-22, 2018 Cleveland, Ohio
National Bowling Tournament	May 18-20, 2018 Campbell, Ohio
Junior Olympics Summer Camp	July 8-14, 2018 Farmdale, Ohio
National Golf Tournament	TBD
92st National Convention	July 20-23, 2018 St. Louis, MO

Thank you for the opportunity to share this update on the Fellowship of Orthodox Christians in America with you. We are grateful for your support and humbly ask you to keep the FOCA, its members, and our good works in your prayers.

Respectfully Submitted,



Marge Kovach
FOCA President

Fall 2017 Report

[Office of Institutional Chaplaincy]

1. OFFICE MANDATE

The Office of Institutional Chaplaincies supports the ministry of full and part-time hospital, hospice, long-term care, prison, fire, police chaplains, and those in other settings.

The Orthodox Church in America is a member of the Commission for Ministry in Specialized Settings (COMISS Network) and endorses chaplains to serve in specific institutional settings and toward certification with the Association of Professional Chaplains (APC), the Association for Clinical Pastoral Education (ACPE), and the College of Pastoral Supervision and Psychotherapy (CPSP).

Archpriest Steven Voytovich serves as the Office's Director, supporting the formal endorsement process for institutional chaplains and facilitating dialogue among those ministering in a variety of institutional settings.

2. OFFICE MEMBERS & RESOURCE PEOPLE

Chair: V. Rev. Dr. Steven Voytovich

Resource People: V. Rev. Theodore Boback

Members: Frs. Paul Fetsko, Alexandre Ioukhaevskikh, Michael Medis, Timothy Hasenecz, Christopher Stanton, Dn. David Neff, Sarah Byrne, Logan Johnson, Elaine Mayol, Anna Nikitina, Jessica D'Angio, Larisa Waya, Brett McKey

V. Rev. Sergei Bouteneff

Website: www.orthinc.org

3. BUDGET REVIEW

- 2017 Budget: \$6,000 stipend, \$1,850 expenses

4. HIGHLIGHTS AND PROJECTED FUTURE INITIATIVES

- Transitions: we ask for continued prayers for Fr. John Maxwell who continues to battle cancer. We have again new chaplains endorsed during this year.
- Our Facebook page has been growing in interest and is now included on the OCA's website front page. We are grateful for this visibility!
- So far the efforts to reach out to emergency response chaplains has not netted many responses. Will continue the outreach for yet a little while.
- Have met briefly with several of our chaplains while traveling for other purposes.
- Several chaplains met at the November OCAMPR meeting in Boston, though no coordination occurred through this office.
- A new credentialing body has been created, Spiritual Care Association (SCA) by The Healthcare Chaplaincy in New York. This body appears to be competing with current credentialing bodies with an eye toward further solidifying engagement in the medical treatment model.
- Changes are also occurring in current credentialing bodies (see below in comments)
- Fr. Steven attended annual endorser meetings in Alexandria, VA (January 2017: COMISS and AREB).

Future Developments:

- We will continue to post opportunities for exchange on our www.orthinc.org website during the year.
- With the advent of now two jurisdictions having similar endorsement processes, we need to continue dialogue toward implementation of uniform approach to institutional chaplaincy endorsement.
- A Compassion-in-Action (CiA) implementation is currently underway, with one of our chaplains assisting in this regard.

- Support the Strategic Plan:
 - Our chaplains are assisting with clergy continuing education; seminarian training. Fr. Steven began a dialogue with Fr. Ian, now in charge of continuing education about the ongoing continuing education chaplains are already undertaking (at least 50 hours each year). We hope to come to some kind of understanding so that chaplains are not having to duplicate continuing education in chaplaincy and church settings.
 - Continue to represent our OCA in the greater pastoral care and counseling arena
- Hopefully opportunities will arise to continue the dialogue begun two years ago with our Orthodox Campus Fellowships (OCF) to support their chaplains.

5. COMMENTS

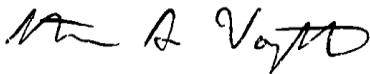
The Spiritual Care Association (SCA) is a body that has established itself for the purpose of credentialing chaplains. Their explicit goal is to utilize political influence to have chaplaincy recognized in medicare procedure payments that are moving to a “bundled” approach. Currently no reimbursement is attached to pastoral care. As such they are highly “data” driven. In meeting with Eric Hall, their leader, during our AREB meeting, however, it is also clear that they do **not** require theological education nor faith tradition affiliation (related through endorsement). The gathered endorsers indicated that much work needs to be undertaken to expand the small amount of common ground now visible between current credentialing bodies and SCA, and again between SCA and endorsers. This conversation continues, but little progress has thus far been made.

Given this development, it should probably be indicated that OCA chaplains are not encouraged at present to seek credentialing with this body, especially if they are presently endorsed for ministry for current positions and other credentialing bodies. It is the position of this office that we should not be endorsing chaplains for certification in this body for the same reasons. It is the concern of endorsers that legal issues may arise for this group, the liability for which is likely real and a threat to all parties connected to it.

Changes in current credentialing bodies are also significant. The Association for Clinical Pastoral Education (ACPE) had regional leadership (like dioceses within the OCA), that are being dissolved. All administrative functionality will be with national office, and centers will be able to join together in what will be called “Communities of Practice.” Also the Association of Professional Chaplains (APC) has discontinued their practice of having new endorsement letters included in five-year peer review process. This has been thus far unsuccessfully argued against by the endorsing community. We should continue to require check in from our chaplains at the five-year review process, and the Office Director will develop language around this and other policies related to ongoing chaplaincy function.

In closing, I once again ask for your prayers on behalf of the men and women serving as chaplains in our institutional settings, bearing witness to the light of Christ to many who are hungry, sick, incarcerated, and in danger.

Respectfully submitted,



The V. Rev. Dr. Steven Voytovich, Director
Office of Institutional Chaplaincies

**Office of Orthodox Church in America Military and Veterans Affairs Medical Center
Chaplaincies Fall Report 2017**

Very Rev. Theodore Boback, Jr. –
Dean/Executive Director OCA Military and VA Chaplaincy
Very Reverend Joseph Gallick -
Assistant Dean/Deputy Director OCA Military and VA Chaplaincy

His Beatitude, Metropolitan Tikhon, serves as Ecclesiastical Endorser for the US Military and Veterans Affairs Medical Center Chaplains;
His Grace, Bishop Daniel serves as the OCA Episcopal Liaison,
His Eminence, Archbishop Nikon, serves as the liaison to the Assembly of Canonical Bishops

Vision

The Orthodox Military Chaplain is an Orthodox Priest in uniform serving in the Armed Forces of the United States of America. The Veterans Affairs Medical Center Chaplain serves in the Department of Veterans Affairs in a medical center. They are active members of the respective chaplaincy and share a common core of professional responsibilities for worship services, personal counseling, administrative duties, pastoral visitations, cultural activities, humanitarian projects, moral leadership, and appropriate collateral duty assignments.

They in addition to fulfilling the disciplines, dogmas, doctrines of faith and other canonical directives required of all Orthodox Priests, comply with the administrative requirements of their Ecclesiastical Endorsing Agency.

They exercise their priestly mission in three ways: to those of the Orthodox Faith, to those of other faiths, and to those who have no religious affiliation.

Mission

The mission of the OCA's military chaplain is the propagation of the Orthodox Faith; to serve, worship, and love our Lord and Savior Jesus Christ; and to bring spiritual nourishment and enlightenment to thousands of Orthodox military personnel and their families serving their country throughout the world.

The mission of the Veterans Affairs (VA) Chaplains is to counsel and to bring spiritual nourishment through the Holy Sacraments to hundreds of Orthodox veterans in VA Medical Centers throughout the United States of America.

Operation

The Office of Military (VAMC) Chaplaincies currently operates directly under the supervision of the Metropolitan and forms a unique deanery of the Church. According to the Statutes of the Orthodox Church in America (Article XI section 4 a.) The Dean of Orthodox Military and Veterans Administration Chaplains is appointed by and directly responsible to the Metropolitan.

The Executive Director and Dean of Chaplains is the chief administrator for the Metropolitan in all matters concerning the OCA chaplains in the Air Force, Army, Navy, Marines, Coast Guard and the Veterans Administration. The Executive Director/Dean is the representative of the Metropolitan to the National Conference of Ministry to the Armed Forces (NCMAF) and the Endorsers Conference for Veterans Affairs Chaplaincy (ECVAC). The Assistant Executive Director works together with the Executive Director. The Executive Director/Dean and the Assistant Executive Director recruit and screen candidates for the chaplaincy, prepare ecclesiastical endorsement for the Metropolitan and maintain contact with all Orthodox chaplains and with the Executive Director of the Armed Services Chaplains Board, Military Chief of Chaplains and the VA National Staff Chaplain and chaplain staff. . They do this through telecommunications, email, correspondence, and by participating in various meetings and site visitations throughout the world. The Executive Director/Dean provides guidance to chaplains serving throughout the world on spiritual matters and ensures that Orthodox personnel, regardless of where they are stationed can freely exercise their religious beliefs. The Executive Director/Dean attends all conferences and executive board committee meetings of the NCMAF and ECVAC.

The Military chaplains from the Orthodox Church in America serve in the United States Armed Forces in the United States, Germany, Korea, Japan, and the Middle East. The Veterans Affairs Medical Center Chaplains serve within the United States at VA Hospitals.

Endorser's Conferences:

The annual National Conference on Ministry to the Armed Forces(NCMAF), the Endorsers Conference for Veterans Affairs Chaplaincy (ECVAC) and the Armed Forces Chaplains Board with the three branches Chief of Chaplains will be conducted 8 – 12 January 2018. Additionally, the OCA Office of Military and VA Chaplaincy is a member of the Commission on Ministry in Specialized Settings (COMISS) which is in session 7 – 8 January 2018. Both the Military and Institutional Chaplaincy have a delegate representative for the COMISS, Very Reverend Steven Voytovich, Director of the OCA Institutional Chaplaincy Department attends the COMISS meetings.

Military Chaplains Association Institute and Veterans Affairs Medical Center

Chaplains Conference – October 2017. The Military Chaplaincy Association (MCA) will hold a conference 23 -26 October 2017 at Newport News, VA. The training sessions will be in conjunction with presentations by the VA Chief of Chaplains Office..

The workshops will include the following presentations: VA Chaplaincy – ministry to veterans; Clinical Pastoral Education no just hospitals anymore; the professional military chaplain; civil air patrol chaplaincy – emerging response; the VA Chaplaincy and suicide prevention; why religion matters; safe and sacred spaces; and Evidence Based – Person Centered Chaplain Care – results of spiritual performance based survey. Chaplain and behavioral health counseling – report of the VA Study will be presented by Chaplain Keith Ethridge of the VA National Chaplain Center and Past VA Chief of Chaplains. The keynote speaker will be Chaplain (BG) Kenneth “Ed” Brandt, Senior Army National Guard Chaplain and US Army Deputy Chief of Chaplains, Guard. Also there will be a business session and a welcome reception.

Chaplain Candidate: Rev. Matthew Fuhrman who graduated St. Tikhon Orthodox Theological Seminary is in the Chaplain Candidate Program of the US Army.

Chaplaincy Kits: The Fellowship of Orthodox Christians in America had a “Gifts of Love” Project for collecting monies for the buying of religious materials and articles to give to our chaplains for service members and veterans. The FOCA had also conducted such projects several years ago. Remaining packets with other religious materials will be distributed to the chaplains this fall.

Military Chaplains:

Orthodox Military Chaplains perform a full cycle of liturgical services including Vespers, Matins, Divine Liturgy, Feast Days, and services during Advent, Great Lent, the Dormition and Apostles Fasts, Liturgy of Pre-Sanctified Gifts and administering the Sacraments of the Church.

Our Orthodox Priests have been deployed in support of the Global War on Terror. Our priests provided worship Services during holy Week and Pascha in tandem with other Orthodox Chaplains from other branches of the services. Others have served with coalition forces for example from Estonia, Georgia, and Romania and others have mentored and have served with the first Orthodox Chaplain in the Canadian Forces since WWII. Others have advised on various issues and concerns such as those who served with the Coast Guard in Alaska where they advised on coastal Alaskan communities which are indigenously Orthodox.

Included among the continued Ministry Concern of our chaplain are: Spiritual Renewal, Ministry of Present, Readiness, Interfaith and Ecumenical Ministries Programs, outreach programs, service on various boards such as family action; biomedical ethics, advisory councils.

Military and VA Chaplain Personnel Strength

Personnel Statistics have changed through the years and continues to change based on requirements of the United States Armed Forces and the Veterans Affairs Medical Centers in fulfilling its missions.

PROMOTIONS and ASSIGNMENTS: Fr. Thaddeus Werner will report to his new duty station at Elmendorf AFB, Anchorage, Alaska in mid September. Fr Timothy Yates was accessioned to active duty in the US Air Force; he reported in August to Lackland AFB, Texas. Fr. Sean Levin will graduate with his training in family life in December and he is projected for a follow on assignment at Fort Belvoir, VA.

Fr. Stephen Duesenberry was selected to promotion in the United States Navy to the rank of (O-6) CAPTAIN and Fr. Peter Dubinin was selected for promotion in the United States Army to the rank of (O-6) COLONEL. Fr. Peter returned recently from his assignment in the Middle East. We pray that God grant His Grace and Blessings upon each of them and their families. **MANY YEARS!**

Orthodox Church in America Military Personnel Strength.

Active Duty

United States Air Force

Father Eugene Lahue, Chaplain, Lieutenant Colonel, USAF, Oklahoma
Father Thaddeus Werner Chaplain Captain USAF Elmendorf AFB, Anchorage, Alaska
Father Timothy Yates, Chaplain, USAF, Joint Base Lackland, San Antonio, TX

United States Army

Father. George Hill, Chaplain (MAJ), USA JAG School
Father Sean Levine, Chaplain (MAJ), USA Fort Hood Texas (Family Life Training)
Father George Oanca, Chaplain (CPT),

United States Navy

Father Stephen Duesenberry CDR-P CHC USN Camp Lejeune, NC

Reserve Component

United States Air Force

Father Oliver Herbel Chaplain, Captain, USAFR
Father Gregory Bruner, Chaplain, Captain, INANG

United States Army

Father Peter Dubinin, Chaplain (LTC-P) USAR
Father Danut Palanceau Chaplain (CPT) USAR
Father James Parnell, Chaplain (CPT) USAR
Father James Sizemore Chaplain (MAJ) USAR

United State Navy

Father Herman Kincaid, LT, CHC, USNR

Retired Military Chaplains

There are over 30 retired Orthodox Priests from the United States Armed Forces with over of them serving within the OCA in various ministries. There is one OCA retired VAMC Chaplain. The retired chaplains have a range of special skills and are an additional asset within our Orthodox Church.

Veterans Affairs Medical Center Chaplains

Father Joseph Martin, VAMC, Wilkes-Barre, PA and Father Sergei C. Bouteneff VAMC Newington, CT serve as the Chief of Chaplain Service at their respective VAMC. Father Philip Reese serves as a full time position at the Miami VAMC recently. We are grateful for their continued ministry.

VA Chaplains might attend training that equips them to perform specific tasks and or to fill certain positions such as Post Traumatic Stress, palliative care, substance abuse; etc.

Nine OCA Priests serve our VAMCs

Father Sergei C. Bouteneff – Newington, CT
Father Igor Burdikoff – Albany, NY
Father Daniel Degyansky – Manhattan, NY
Father John Klembara – Brecksville, OH
Father Joseph Martin – Wilkes-Barre, PA
Father James Parnell – New Haven, CT
Father Philip Reese, Miami, FL
Father Paul Suda – Pittsburgh, PA
Father George York, Pittsburgh, PA

Need for military chaplains

Recruitment of seminarians in the various branches of our US Armed Forces continues to be conducted. Also, continued discussion with the Holy Synod of Bishops reference the need for chaplains continues.

ENDORISING CONFERENCES

The Orthodox Church in America continues to be an active member and participant in the National Conference of Ministry to the Armed Forces (NCMAF) and the Endorser Conference for Veterans Affairs Chaplaincy (ECVAC).

The Orthodox Church in America is recognized by each of these organizations and the Military Chief of Chaplains and the VA National Chaplain Center as the endorser for OCA priests. To be considered for the military or veterans affairs medical center chaplaincy, a candidate must first have his Diocesan Bishop's Blessing, then an ecclesiastical endorsement from the Metropolitan, which is prepared by the Dean/Director of the OCA Chaplaincies as well as the candidate must meet the

requirements of the United States Armed Forces or the Veterans Affairs Medical Center National Chaplain Office.



Pension Office
P.O. Box 675
Syosset, NY 11791
Tel: 516-922-0550
Fax: 516-624-3153
Email: pension@oca.org

August 31, 2017

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

On behalf of the OCA Pension Board, I take this opportunity to update you on the status of the Pension Plan as of July 31, 2017.

The net time-weighted return for the period January 1 through July 31, 2017 was 9.02% compared to our benchmark of 9.35% for the same period. This improvement in the net return was due in large part to the change in strategy that the Plan initiated this year. Markets globally continued to gain in the second quarter of 2017. Led by international markets, it appears we are in the midst of the most simultaneous global economic upturn since 2009. We are, however, watching the Federal Open Market Committee, which hiked rates for the third meeting in a row in the second quarter and signaled one further hike in 2017. The ending market value of plan assets at July 31, 2017 was \$24,946,610.

In the interim since the last Metropolitan Council Meeting, the Pension Plan has been audited and the draft report includes an unqualified (clean) opinion. We also received notice from the IRS that the plan is now finally under review by a specific agent for the determination we requested last year. Plan counsel reviewed a recent Supreme Court decision regarding the status of Church Plans with reference to health benefits. The decision clarifies the meaning of "church plan" for tax purposes to include entities with a principal purpose of carrying out the church's mission. Work continues on the effort to obtain endowments to the Plan as well as the continuing discussions regarding retired priests serving what is being called "distressed parishes".

With regard to participation in the Pension Plan, there are currently 339 active participating members (the highest number to date) and 178 monthly benefits recipients.

Respectfully Submitted,

Priest Gleb McFatter, Chairman