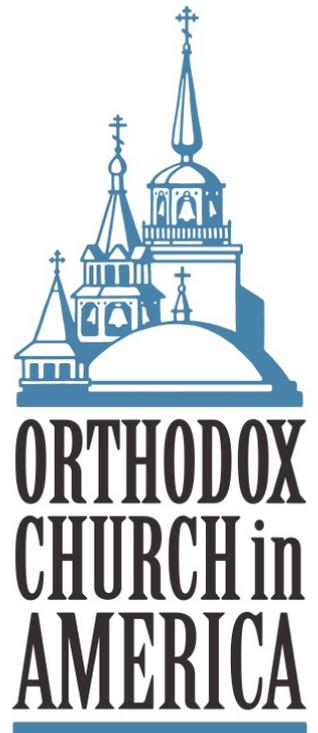

METROPOLITAN COUNCIL of the ORTHODOX CHURCH IN AMERICA

REPORTS
2025 Spring Session



Tuesday, February 25 – Thursday, February 27, 2025
Conducted by video conference

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**TENTATIVE SCHEDULE and AGENDA ITEMS
REGULAR SPRING SESSION OF THE METROPOLITAN COUNCIL
February 25 & 27, 2025**

TO BE HELD VIA TELECONFERENCE

Tentative Agenda – Tuesday, February 25, 2024, 1:00-4:00 pm EST

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call– Archpriest Alessandro Margheritino
5. Approval of the Minutes of the Regular Fall 2024 Session
6. Report of the Metropolitan – His Beatitude Metropolitan Tikhon
7. Report of the Acting Chancellor & Secretary – Archpriest Alessandro Margheritino
8. All-American Council – Protodeacon Peter Ilchuk
9. Property Committee – Gregory Honshul
10. Chancery Feasibility Study – Igor Dabik
11. Legal Report – Mark Hamilton
12. Report of the Treasurer – Mr. Andrew Smith
13. Concluding Remarks – His Beatitude
14. Prayer – His Beatitude

Tentative Agenda – Thursday, February 27, 2024, 1:00-4:00 pm EST

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call– Archpriest Alessandro Margheritino
5. Internal Audit – Matushka Sharon Hubiak
6. Pension Board – Matushka Mary Buletza-Breton
7. Pension Committee – Donna Dimitri
8. HR & Ethics Committee – Lisa Mikhalevsky
9. Report of the Office of Pastoral Life – Archpriest Nicholas Solak
10. OCA Departments – Archpriest Thomas Soroka
11. Concluding Remarks – His Beatitude
12. Prayer – His Beatitude

METROPOLITAN TIKHON COMPLETE LOG OF TRAVEL AND EVENTS
In chronological order by category
09/2024-02/2025

A. Archdiocese of Washington Pastoral Visits. *This category contains a list of all the liturgical and pastoral visits that I made to the communities of the archdiocese of Washington. This list includes occasions when I simply attended but did not serve, occasions when I celebrated in the presbyteral manner, and occasions when I served in the hierarchical manner.*

- 24.09.22: Divine at All Saints in Alexandria
- 24.10.06: Divine Liturgy at Saint John the Theologian with elevation to full mission status
- 24.10.13: Divine Liturgy at Saint Luke in McLean
- 24.10.27: Divine Liturgy at All Saints in Alexandria
- 24.11.03: Divine Liturgy at Saint Mark in Bethesda
 - Synodal Gramota for Archpriest Gregory Safchuk (40th anniversary)
- 24.11.10: Divine Liturgy at All Saints in Alexandria
- 24.12.05-06: Vigil and Divine Liturgy at St Nicholas Cathedral for the feast of St Nicholas.
- 24.12.08: Divine Liturgy at Holy Archangels Mission
- 24.12.13: Divine Liturgy at All Saints in Alexandria
- 24.12.29: Divine Liturgy at Saint Mark in Bethesda
- 25.01.01: Divine Liturgy at All Saints in Alexandria
- 25.01.05-06: Vigil and Divine Liturgy at St Nicholas Cathedral
- 25.01.05-06: Vigil at St Nicholas Cathedral for the feast of Theophany
- 25.01.07: Vigil at St Nicholas Cathedral for the feast of Nativity (OS)
- 25.01.18: Vigil at St Nicholas Cathedral
- 25.01.26-27: Great Vespers and Liturgy at All Saints in Alexandria
- 25.02.01: Vigil at St Nicholas Cathedral for the feast of the Meeting
- 25.02.02: Divine Liturgy at All Saints for the Meeting of the Lord
- 25.02.15: Vigil at Saint Nicholas Cathedral
- 25.02.16: Divine Liturgy at Saint Nicholas Cathedral
- 25.02.22: Great Vespers at Saint Mark in Bethesda
- 25.02.23: Divine Liturgy at Saint Mark in Bethesda

B. Archdiocese of Washington Events. *This category records all those events to which the entire diocese was invited to participate. Although this year's list includes primarily liturgical events, it is intended to also include social events.*

- 24.09.21: Archdiocesan Divine Liturgy followed by Archdiocesan Assembly at Saint Matthew in Columbia
- 24.11.10: "The Gate Facing East" Concert by the Archdiocesan Choir at Ss. Peter and Paul Antiochian Church in Potomac, MD.
- 24.12.07: Retreat on grieving at All Saints in Alexandria

C. Archdiocese of Washington Administration. *This list is not exhaustive but notes some of the more important administrative meetings, many of which are held on a regular basis. This list does not include occasions when I discuss administrative or pastoral matters with the clergy or faithful on the telephone or via electronic mail.*

- 24.10.23: Meeting of Clergy Brotherhood of the Greater DC area

- 25.01.07: Meeting with Director of Archdiocesan Choir
- 25.01.16: Meeting with Archdiocesan Metropolitan Council representatives, Dn. Matthew Prentice and Gregory Honshul
- 25.02.13: Archdiocesan Council meeting
- 25.02.16: Annual Meeting St Nicholas Cathedral

D. Primatial Travel. *The following are the major events that I participated in as the primate of the Orthodox Church in America. They include visits to gatherings of entire dioceses and visits to individual parishes for significant events.*

- 24.10.4-5: Vespers and Divine Liturgy for the 50th Anniversary of Saint Stephe's Cathedral in Philadelphia.
- 24.10.15-17: Diocese of the West Assembly in Milwaukie, Oregon.
- 24.10.19: Divine Liturgy at Saint Gregory the Theologian in Wappingers Falls, NY for the 60th anniversary of the parish
- 24.10.29-30: Diocese of the South Assembly in Richmond, Virginia
- 24.12.24-25: Vigil and Divine Liturgy for the Nativity at St Gregory of Nyssa in Columbus, OH.
- 25.01.10-13: Annual visit to the Diocese of Mexico
- 25.02.08: Great Vespers at Holy Theophany in Colorado Springs, CO
- 25.02.09: Consecration of the Temple and Divine Liturgy at Saint John the Baptist in Colorado Springs, CO.

E. Orthodox Church in America Chancery. *This category refers to the various administrative meetings that I preside at or hold in my capacity as the primate of the Orthodox Church in America and that are coordinated through the chancery office. These include meeting of the Holy Synod, the Metropolitan Council, and various church-wide boards and committees.*

- 24.10.09-11: Autumn meeting of the Metropolitan Council
- 24.10.21-23: Phone calls with retired/former bishops of the Orthodox Church in America
- 24.10.28: Interview for clergy reception into the Orthodox Church in America
- 24.11.04-08: Autumn Session of the Holy Synod
- 24.12.12: Monthly Standing Synod meeting
- 24.12.17: Retreat on fasting offered to the quarterly Synaxis of the OPL
- 25.01.03: Chancery Christmas party
- 25.01.08: Monthly Standing Synod meeting
- 25.02.12: Meeting of the Preconciliar Commission
- 25.02.25: Spring meeting of the Metropolitan Council
- 25.02.27: Spring meeting of the Metropolitan Council
- *Ongoing*
 - Daily meetings with officers and staff of the Orthodox Church in America

F. Stavropegial Institutions. *As the Metropolitan, I have oversight of the stavropegial institutions, including the monasteries (Saint Tikhon's Monastery, Holy Myrrhbearers Monastery, and the New Skete Monasteries), the seminaries (Saint Tikhon's Seminary and Saint Vladimir's Seminary), and the military and institutional chaplains. Also included in this category is Saint Catherine's Representation Church in Moscow and the*

various clergy who serve directly under my omophorion but are located in other places (such as OCMC missionaries).

- 24.07.29: SVS President Search Committee Meeting
- 24.07.30: Phone call with Dean and Representative at Saint Catherine Representation Church in Moscow.
- 24.08.09: SVS Full Board meeting
- 24.08.19: SVS President Search Committee Meeting
- 24.08.22-23: SVS Orientation and meeting with faculty, staff, and seminarians
- 24.09.06: Pastoral visit to the Holy Myrrhbearers Monastery in Otego, NY.
- 24.09.07: Meeting with STS seminary leadership
- 24.09.07-08: Vigil and Liturgy at Saint Tikhon's Monastery Church for the feast of the Nativity of the Theotokos and the beginning of the academic year.
- 24.09.13: Meetings with SVS faculty, staff and administration
- 24.09.13-14: Vigil and Liturgy at Three Hierarchs Chapel for the feast of the Exaltation of the Cross and the beginning of the academic year. Ordination to the priesthood of Vitaly Permiakov.
- 24.10.03: Meeting of the SVS Board of Trustees
- 24.10.18: Divine Liturgy at Saint Vladimir's Seminary
- 24.10.25: STS Board of Trustees meeting
- 24.10.25: Burial services for Archpriest Peter Telencio
- 24.10.25-26. Burial services for Archpriest Dionysius Swencki
- 24.11.01: Funeral for Monk Nicodemus at Saint Tikhon's Monastery
- 24.12.07: SVS President Search Committee meeting
- 24.12.12: SVS President Search Committee meeting
- 25.01.07: SVS President Search Committee meeting
- 25.01.08: SVS President Search Committee Interviews
- 25.01.22: SVS President Search Committee Interviews
- 25.01.14: SVS Executive Committee meeting
- 25.01.29: Vigil for Three Hierarchs at SVS
- 25.01.30: Liturgy for Three Hierarchs at SVS with Annual Schmemmann lecture
- 25.02.06: SVS President Search Committee meeting
- 25.02.11: SVS Executive Committee meeting
- 25.02.23: Special SVS Board meeting

G. External Affairs. *According to the Statute of the Orthodox Church in America, the Metropolitan has care for both the internal life of the Church and her external relations with other churches. The following is a list of my activities in the area of external relations, that is interactions with other Orthodox Churches both locally and globally, as well as various ecumenical activities.*

- 24.09.12: Meeting with Metropolitan Saba of the Antiochian Orthodox Archdiocese
- 24.09.28-10.01: Assembly XIII of the ACOB in Atlanta
- 24.10.12: Meeting with Sam Brownback, former Ambassador for Religious Freedom
- 24.10.24: Interview with Soyuz TV (Moscow)
- 25.01.09: Funeral for President Jimmy Carter at the National Cathedral
- 25.01.10-13: Concelebration with Metropolitan Iakovos of the EP and Metropolitan Ignatios of the Antiochian Church during annual visit to the Diocese of Mexico

- 25.01.23: Meeting with leadership of Orthodox Christians for Life
- 25.01.23: Attendance at Mass for Life at Basilica with ACOB delegation
- 25.01.24: Annual March for Life with molieben
- 25.01.28: Screening of movie “El Tonto Por Christo”
- 25.02.04: Panelist at the International Religious Freedom Summit and meeting with Richard Halverson from the National Prayer Breakfast Foundation
- 25.02.06: Meeting of the Executive Committee of the Assembly of Bishops
- 25.02.18: Meeting with Archpriest Daniel Andrejuk, Dean of Saint Catherine’s in Moscow

H. Personal time. *In an effort to emphasize the importance of clergy health, as well as the health of our faithful, I include here a list of some of my activities related to my physical health which also have an impact on my mental and spiritual health.*

- 24.11.13-30: Winter Vacation in the French Alps and Columbus, OH
- 24.12.24-28: Personal time with family in Columbus, OH
- Ongoing
 - Hiking 3-4 miles in the morning (4 days/week)
 - Weekly check-in with nutritionist

Report of the Acting Chancellor and Secretary of the Orthodox Church in America
Regular Spring 2025 Session of the Metropolitan Council
February 25 & 27, 2025

1. **Introductory Remarks.** I present this report in my capacity as both the Acting Chancellor and the Secretary of the Orthodox Church in America.

In early December, the Chancery entered a new period of transition with the announcement that Archpriest Alexander Rentel would step down as Chancellor after six years of faithful service. He would be resuming his teaching responsibilities at St. Vladimir's Orthodox Theological Seminary while also assuming an administrative role as Chief Operating Officer.

At the same time, His Beatitude Metropolitan Tikhon appointed me Acting Chancellor, effective January 1, in addition to my ongoing responsibilities as Secretary. I am deeply grateful for the trust His Beatitude and the Holy Synod have placed in me during this period of transition as a permanent Chancellor is considered.

Given our already minimal staff, the departure of a key full-time employee adds further strain to an already delicate balance. This is particularly significant as we prepare for several major events in the coming months, most notably the canonization of St. Olga and the 21st All-American Council.

At present, the Chancery has only three full-time employees: Priest John Mikitish, Deacon Alexander, and myself. With the additional responsibilities I have taken on, I have asked Fr. John and Dn. Alexander to assist with various projects that generally fall under the Office of the Secretary, and I am deeply grateful for their support and dedication.

Additionally, recent administrative changes within the Archdiocese of Washington have required our office to provide increased support for His Beatitude's diocesan responsibilities, serving the eleven parishes of the Archdiocese.

Under the direction of His Beatitude, we have implemented an even more focused work schedule aimed at maintaining order and ensuring that, despite this transitional period, the essential work of the Chancery continues for the glory of God and the strengthening of His Holy Church in North America. While this arrangement is only sustainable for a limited time, we remain committed to carrying out our responsibilities with diligence and faith.

2. **Chancery.** In my temporary role as Acting Chancellor, I have been entrusted with full responsibility for the operation of the Chancery. Thankfully, in my role as Secretary over the past few years, I worked closely with Archpriest Alexander Rentel on most aspects of Chancery operations. However, assuming this new role has significantly increased my workload and level of responsibility.

Previously, I shared duties with Fr. Alexander in communicating with priests, bishops, and various other stakeholders in the Church. Now, a substantial—if not the majority—of my time is spent in meetings via Zoom, in person, and over the phone.

I am grateful to His Beatitude for his guidance and constant presence. Even when one of us is traveling, we remain in contact daily. I also remain in touch with the former Chancellor, Fr. Alexander, who is readily available whenever questions arise.

As I mentioned earlier, the work at the Chancery is highly focused and intense, yet it continues to progress positively. Though we are a small team, we are fortunate to have a dedicated and highly efficient group of workers.

While Chancery operations are now solely based in Springfield, VA, our Archivist, Alexis Liberovsky, continues his work in Syosset. The Westwood property is currently under contract for sale, and we are actively managing the various steps outlined in the purchase agreement. Our office continues to prepare for the closing of Westwood. I have also been in touch with a parishioner from one of our Long Island parishes who is willing to assist with this project.

3. **Activities and Initiatives.** Since December, I have continued to be engaged in my normal round of activities as Secretary but also added most of the normal activities of the Chancellor.

Some of the new areas which I now more directly oversee are clergy transfers, external affairs, and ORSMA. Though in the past I was not completely estranged from those aspects of Chancery work, they were not areas where I was principally involved as Secretary. As such, I have spent quite a bit of time familiarizing myself with processes and established policies, as well as spending time making contacts with other churches to continue strengthening relationships.

Among other things, I maintain regular contact with Fr. Daniel Andrejuk, the Dean of St. Catherine in Moscow and Representative of the Orthodox Church in America to the Patriarchate of Moscow.

Here is a list of some of the most noteworthy activities since January:

- a) On January 9, I accompanied His Beatitude to the National Cathedral in Washington for the funeral of President James Carter, where His Beatitude was present as the Orthodox representative.
- b) I traveled with His Beatitude to Mexico for his yearly visit to the Diocese on January 10-13.
- c) On January 17-18, I traveled to Dallas with Protodeacon Peter Ilchuk, Council Manager, to visit two hotels as possible sites for the 22nd All-American Council in 2028.
- d) I accompanied His Beatitude to the International Religious Freedom Summit in Washington, DC, on February 4.
- e) On February 8-9, I traveled with His Beatitude to Colorado Springs for the consecration of the newly built St. John the Baptist Church.
- f) On February 19, I began an 11-day international trip on behalf of His Beatitude and will be returning back to Washington on March 1.

In my temporary role as Acting Chancellor, I became ex officio members of a number of boards, including the boards of our two Stavropegial Seminaries. In that capacity, I have already attended two board meetings of St. Vladimir's Seminary via teleconference.

On February 11, I convened a meeting of the Holy Myrrhbearers Monastery's board to continue assessing the next steps for its well-being as it navigates ongoing challenges.

In my secretarial duties, the last few weeks have been especially busy with the preparation of the Spring Sessions of both the Metropolitan Council and the upcoming Holy Synod next month. Additionally, as we get closer to the 21st All-American Council, my work with Pdn. Peter and the Preconciliar Commission has entered a busier phase as we have begun selecting leaders and chairs of the various local committees as well as the teams needed for the functioning of the Council. I will refer you to Protodeacon's report for further information.

Following some of the discussions at the Fall Session of the Metropolitan Council, with the blessing of His Beatitude, I put together an *ad hoc* working group that we called "Chancery Feasibility Study Group." This group has been tasked with evaluating the needs, opportunities, and challenges for a future permanent Chancery office. Besides me, joining this *ad hoc* group were Mr. Andrew Smith, Treasurer of the Orthodox Church in America, Mr. Joshua Godbold, member of the Metropolitan Council from the Diocese of the South, and Mr. Igor Dabik, a member of the Archdiocese of Washington who works in corporate investment and merge and acquisition. Mr. Dabik will offer a report to the Metropolitan Council on the initial findings of our group.

Similarly, following up on the discussion on salary levels at the last Metropolitan Council, Ms. Lisa Mikhalevsky, Chair of the HR and Ethics Committee, and I have begun working with our HR Consultant, Ms. Laura Detke, and a non-profit consultant, Mr. Nicholas Chakos, on a study of the Chancery employees' salary guidelines.

Among the ongoing projects and initiatives, I want to report on the significant progress with the new icon of All Saints of North America. For your convenience, I posted some pictures on BOX. The icon will be displayed at the Council in Phoenix.

4. **Personnel Matters.** Since the Fall 2024 Session, four personnel matters are worth noting. The most significant event—already indicated earlier—is the stepping down of Fr. Alexander Rentel as Chancellor. We are grateful for the six years of devoted and faithful service to the Orthodox Church in America. I would refer everyone to the press release issued on the feast of St. Nicholas and the remarks made by His Beatitude.

At the end of December 2024, with the blessing of His Beatitude and with the support of ORSMA and SMPAC, Ms. Cindy Heise and I signed a contract that appointed her the new Coordinator for the Office for Review of Sexual Misconduct Allegations (ORSMA). Cindy is well known to many around the Church since she served in this capacity for several years previously, effectively acting as the very first

ORSMA Coordinator for the Orthodox Church in America. Her appointment has, no doubt, brought stability and continuity to this office. As the Acting Chancellor, I continue to serve as the Director of the Office, and any questions and reports of allegations can be addressed to either of us.

A few weeks ago, with the blessing of His Beatitude, and in light of the relocation of the Archives to St. Vladimir's Seminary, we agreed on a retirement date for Alexis Liberovsky from his position of Archivist. We are grateful to Alexis for his many years of service as the historian and archivist of the Orthodox Church in America. Alexis and I have indicated the possibility of continuing working together on some projects where he can be engaged as a contractor. His last day of full-time employment will be July 31, 2025.

Starting January 1, 2025, we have engaged Matushka Jennifer Levine as a part-time administrative assistant. Jennifer, who has worked with the Office of Pastoral Life for the past few years, began helping the Chancery in November and December 2024 for a few hours a week. In her new role, she supports the office with clerical tasks, hospitality, and a few administrative projects.

5. **SMPAC.** The Sexual Misconduct Policy Advisory Committee serves in an advisory role, offering guidance on enhancing the content and effectiveness of the Policies, Standards, and Procedures on Sexual Misconduct. It also reviews the implementation of the Church's PSPs and ensures compliance with these policies.

The current members of SMPAC are Archpriest Alessandro Margheritino, Acting Chancellor and Secretary; Ms. Cindy Heise, ORSMA Coordinator; Archpriest David Mezynski; Archpriest Justin Patterson; Protodeacon Peter Danilchick; Deacon Ken Liu, Esq.; and Mr. Robert Koory, Esq.

SMPAC continues to hold regular monthly meetings, each centered on a specific topic. These meetings are conducted via teleconference, typically on the second Thursday of each month. In recent meetings, we continued our discussion on how to support the Dioceses that are especially struggling with the implementation of the PSPs and supporting their clergy and parishes with educational initiatives.

SMPAC has recently appointed a subcommittee that has been tasked with drafting a revision of the abbreviated PSPs that would use more precise language and that could more easily be employed by our parishes.

6. **Additional operations.** As the Secretary, I continue to oversee several important ongoing tasks in which I am actively involved. I continue to manage the 501(c)(3) master list and assist various parishes with their tax-exempt status, oversee the insurance needs of the Orthodox Church in America, maintain the Church's documents and database, provide support to the Holy Synod, and serve in an advisory role to the Metropolitan as an officer of the Church. Additionally, I am responsible for maintaining the compliance of the Stavropegial institutions with the PSPs. For these and several other tasks, I work closely with our General Counsel, Mr. Mark Hamilton.

As indicated above, much of my attention over the past few months has turned to the preparation of the All-American Council. The PCC has met and communicated several times working on the schedule, agenda, youth program, budgetary issues, and several other aspects of the council.

Fr. Kyle Parrott, Direct of Communication, continues to work with the *ad hoc* group charged with receiving the reflections in response to the Call dor Reflections issued by His Beatitude Metropolitan Tikhon. The deadline to submit the reflections was February 18. At this point, the *ad hoc* group led by Priest Andrew Smith of the Diocese of the West will review all the reflections and begin preparing what will, hopefully, become a white paper to publish on the website and in the AAC Delegate Handbook. This white paper will present the voice of various corners of our Church regarding the state, the challenges, and the opportunities of the Orthodox Church in America today.

7. **Archives.** As is generally known, the Archives of the Orthodox Church in America now have their most fitting home in decades, as they are housed in a beautiful space within St. Vladimir's Seminary's Rangos Building.

However, there are still unsorted documents in the Westwood basement that belong to the Archives and need to be relocated to St. Vladimir's. Their preparation continues to be slow and will likely require the hiring of a team that can accomplish this after the All-American Council. This is necessary also to address the several items in the basement that do not belong to the Archives and, as decided more than three years ago, must be disposed of as soon as possible.

8. **Final remarks.** I am happy to report that in December, I submitted my final project and have officially received my Doctor of Ministry degree from St. Vladimir's Seminary. His Beatitude conferred this degree on me on the feast of Three Hierarchs on January 30. The title of my completed work is "The Experience of Applied *Sobornost*: The Metropolitan Council of the Orthodox Church in America."

I continue my ministry as the rector of All Saints of America Orthodox Church in Alexandria, VA. During my appointment as Acting Chancellor, I have secured partial pastoral assistance, especially during my additional travels. I am grateful to Archpriest Sean Levine for offering his support while he continues his important work as a Chaplain at the Pentagon.

I am grateful to His Beatitude for his archpastoral care and the confidence he has in me as I continue to serve our beloved Church. I also extend my gratitude to all those who work for the Chancery as employees or contractors, and especially to my colleagues Mr. Andrew Smith, Fr. John Mikitish and Deacon Alex Woodill.

Archpriest Alessandro Margheritino

Acting Chancellor & Secretary of the Orthodox Church in America

PROPOSED STATUTE AMENDMENT
21st ALL-AMERICAN COUNCIL
Phoenix, AZ – July 14-18, 2025

PROPOSED STATUTE AMENDMENT

Rationale

This amendment to Article V, Section 3.b provides essential clarity and standardization to the terms of office for Diocesan Representatives serving on the Metropolitan Council. While the current statute establishes a three-year term length, it does not specify when these terms begin and end, which has led to inconsistent practices across dioceses and potential confusion about exact dates of service. By establishing January 1 as the universal start date and December 31 as the end date, the amendment creates a clear framework that aligns with the calendar year and enables smoother transitions between representatives. This standardization is particularly important for ensuring consistent diocesan representation at Metropolitan Council meetings that often occur around the time of diocesan assemblies, when new representatives are typically elected. The clear delineation of term dates eliminates any ambiguity about which representative—outgoing or incoming—should attend these meetings.

The proposed standardization of term dates also offers practical administrative benefits for both diocesan and central church operations. It allows for better planning of council activities and facilitates more orderly elections and transitions of leadership in Metropolitan Council's committees.

Current Statute: Article V, Section 3.b—Metropolitan Council

Terms of office

- b) Diocesan Representatives to the Metropolitan Council are elected for a term of three (3) years.

Proposed Amendment

Terms of office

- b) Diocesan Representatives to the Metropolitan Council are elected for a term of three (3) years. This term begins on January 1 of the year immediately following their election and concludes three years later, on December 31.

21st All American Council Report
Metropolitan Council Spring Session 2025
Protodeacon Peter Ilchuk

Introduction

Since my last report, work has continued in planning the 21st All American Council slated to be held in Phoenix this summer. The dates will be Monday July 14th to Friday July 18th, 2025 at the Arizona Grand Resort. As you all know, the Preconciliar Commission has continued its work as well as the Chairpersons of local Committee.

The Executive Board of the FOCA has also begun planning for their 98th National Convention, which is scheduled to take place during the Council from Tuesday, July 15th to Thursday, July 17th, 2025, also at the Resort in Phoenix.

Preconciliar Commission

The Preconciliar Commission recently met to review its work and the work of the local committee. During this meeting, recommendations were made for the schedule and agenda to be approved by the Metropolitan Council and the Holy Synod.

The next meeting of the Preconciliar Commission will take place sometime during Great Lent.

Local Committee

I travelled to Phoenix during the first week of February to meet with the local committee chairpersons and the subcommittee chairs. I also had the opportunity to meet with the Hotel as well as some local vendors that we will be using for the operation of the council. The local committee, Co-Chaired by Dn. John Weiss and Ms. Lydia Osolinsky, continues its work on recruiting volunteers and working on their various tasks assigned to them to ensure a successful Council operation. Once again, they are very excited to start up their work and look forward to welcoming the Hierarchs, Clergy, and Faithful of the Orthodox Church in American back to the Diocese of the West.

General Updates

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

The Council Webpage is live on OCA.org and there will be a direct link on the homepage for easy access. Council Registration opened in January, and we have had a wonderful and predicted response thus far. As of the time of this report we have 144 Delegates, and 30 Observers registered. This is on target from previous Councils. We expect numbers to continue to rise as we get closer to the Council.

On the hotel side of things, registration is also on par with previous years. We have a total of 2785 Room nights contracted. Our minimum rooms nights to reach for our contracted concessions is 2144 Room nights. At the time of this report, we have approximately 950 room nights booked. I anticipate reaching our minimum as in previous years.

If we fill our total block of 2785 room nights, the City of Phoenix has generously offered us 1\$ per actualized room nights up to \$2,785, which will be applied to our master account. This is for appreciation for coming to Phoenix for our Council.

The youth program has also begun its preparations. Under the direction of Fr. Jason and Matushka Ashley Foster, the team has started to create its program and build their volunteer and staff numbers that will be needed to ensure a successful and fun program for our children and young adults. As of the time of this report, we have had about 15 youth, and 30 volunteers/staff registered. I once again expect those numbers to continue to rise as well.

The original plan for the youth program was to have a high school/college age component as well. Unfortunately, due to limited resources and availability, this aspect of the program will not take place in an official manner.

The youth program will consist of youth from K – 8th grade.

Mandated Timeline (Per Statute)

- Official All-American Council Agenda to be approved by the Holy Synod and Metropolitan Council at the 2022 Spring Sessions (February – March 2025)
- Proposed Statue Revisions 90 days prior (April 14th, 2025)
- PCC to publish agenda, notices, and arrangements 60 days prior (May 14th, 2025)
- Chancery to publish credentials and certification 30 days prior (June 14th, 2025)
- Council reports to be posted by Chancery 30 days prior (June 14th, 2025)
- All statute changes or amendments, resolutions, etc. to be posted 30 days prior (June 14th, 2025)

General Timeline for AAC

- Hotel Reservations Cut-Off date will be **Friday, June 13th, 2025.**
- Council Registration and Youth Program Registration Cut-Off date will be 30 days prior, which is **Friday, June 13th, 2025.**
- Chancery Team and Local Staff will arrive on **Saturday, July 13th, 2025,** to begin setup and load-in.

- The 98th FOCA National Convention will take place on **Tuesday, July 16th – Thursday, July 18th, 2025.**
- The Council will begin Monday and finish on Friday. Tear down and load-out will take place throughout the afternoon and evening.

Conclusion

One final topic that will be discussed during your meeting will be the dates and location of the 22nd All American Council. Over the past few years. The convention and conference industry has seen a tremendous amount of growth and demand as we enter the post-covid era. Hotels are still in recovery mode and are expected to continue operating in that mindset for the foreseeable future.

What does that mean for us? Traditionally we begin planning the next All-American Council at the conclusion of the previous Council. Due to these new circumstances within the hotel industry, we need to start the site planning earlier. Therefore, Fr. Alessandro and I traveled to Dallas last month to review two hotel sites upon recommendation of ConferenceDirect, our partner in Council site negotiations. We looked at two properties, the Hyatt Regency Dallas at Reunion Tower, and the Sheraton Dallas Hotel.

Based on our site visit, it is our recommendation to move forward and select the Hyatt Regency Dallas as the site of the 22nd All American Council. The final draft proposal and contract are being completed. I expect to have a final version ready for review by the Metropolitan Council and the Holy Synod. We would ask you to keep this information confidential with negotiations still ongoing.

Some highlights of the current offer are:

- 22nd All American Council Dates: Monday, July 23rd to Friday, July 28th, 2028.
- Room rate will be 189.00, Staff Rate will be 139.00
- Reduced daily parking of \$15.00 down from \$30.00
- City of Dallas Incentive: \$10.00 per room night actualized. Potential of 26,080.00 credit to the master account.

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

Respectfully Submitted,

Pdn. Peter Ilchuk, Council Manager

The Orthodox Church in America

Metropolitan Council

Property Committee Update

25 February 2025

Your Beatitude, Reverend Fathers and Brothers and Sisters in Christ,

Background

We are approaching the one-year anniversary of our contract agreement with Kochar and Associates and significant progress continues towards achieving all necessary milestones. The following list of activities is confirmed through our real estate counsel, Harris, Bloom and Archer.

Activity

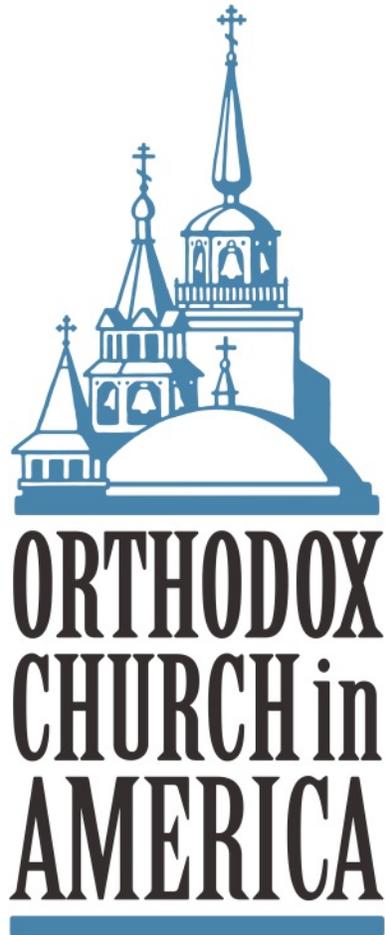
- Completion of initial 60 day due-diligence period – during which time – the buyer may withdraw from the sale without penalty, for any reason.
- With the due diligence period completed, the buyer met scheduled milestones with two payments of \$25,000 each (earnest monies) to the Orthodox Church in America. Next \$25,000 payment is expected in June of 2025.
- Cronin & Cronin are tax attorneys who are working with our real estate attorney team, to continue efforts to mitigate Westwood’s property tax burdens. They do so by filing annually a Property Tax Appeal challenge and these efforts are viewed positively by the buyer resulting in small but appreciated reductions.
- Anticipating the requirement for approval by the New York Attorney General for the sale of Westwood, our real estate attorney team have initiated preparations for this process by completing an appraisal evaluation of the Westwood property to determine current market valuation. This was completed in May of last year with a favorable determination of value noted below the contract sale price.
- Buyers have finalized their five-lot subdivision plan which was forwarded to and approved by the Orthodox Church in America. The plan is now with the Village Planning Board for their review and expected approval(s).
- It is reported to us that the buyer has expended significant funds to date (estimated ~ \$250K), which contributes to our confidence that this deal will proceed to closure as anticipated.
- Final approval by the Village Planning Board will trigger next approval steps including Health Department (septic) and State Roads Commission approvals, followed by submission to the New York State Attorney General for approval of the contract & closure.

Please contact Greg Honshul for any questions you may have regarding the sale of Westwood.

Requesting Your Beatitude’s Blessing!

Respectfully Submitted:

Gregory Honshul, Chairperson



OCA Chancery Feasibility Study

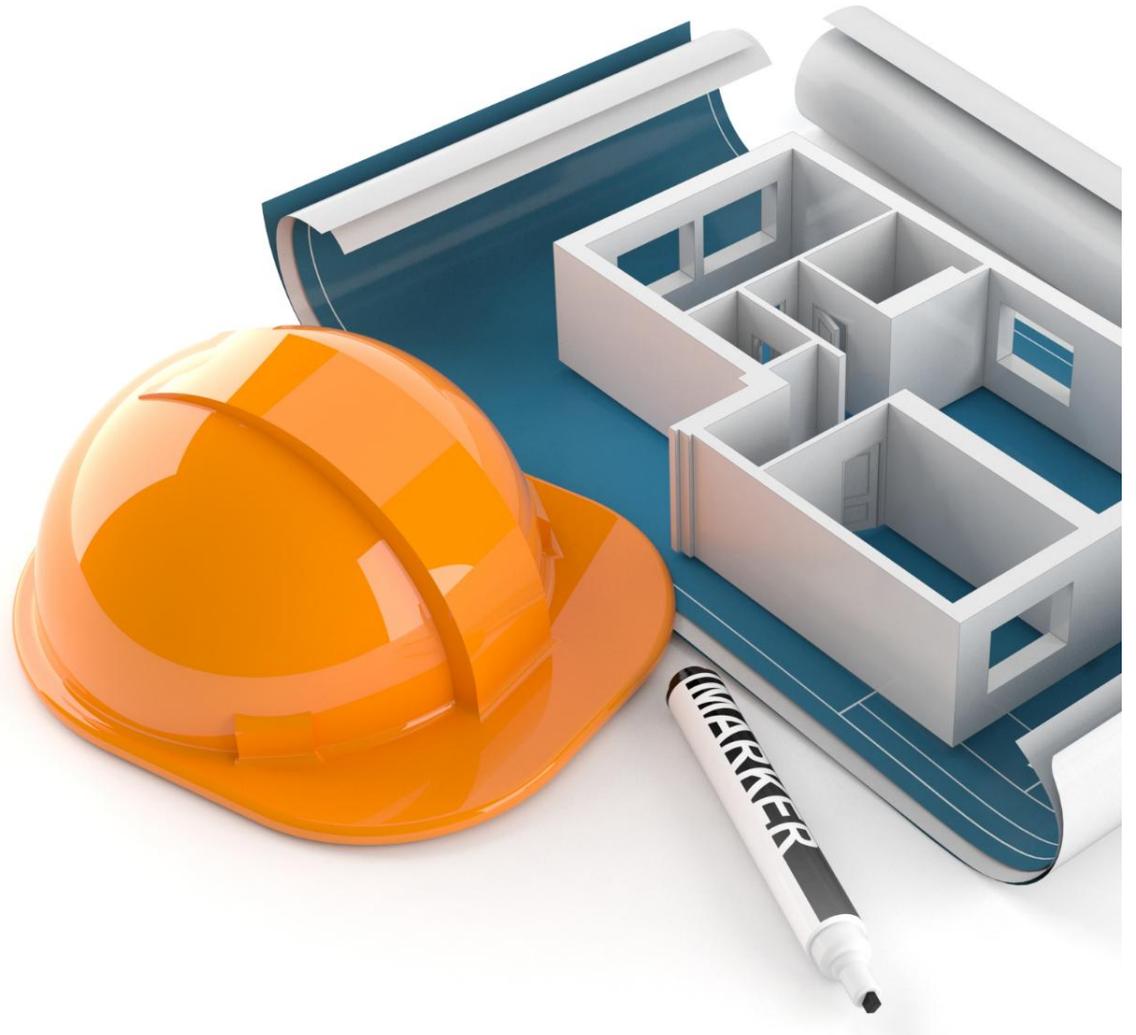
*Assessing options for the Church's new
Chancery*

Prepared by:

- Fr. Alessandro Margheritino
 - Andrew Smith, OCA Treasurer
 - Joshua Godbold, Engineering and OCA Metropolitan Council member
 - Igor Dabik, Consultant
-

Presentation Contents

- Introduction and Objectives
- Criteria for New Property
- Constraints of the Northern VA / Washington DC Metro Area
- Recent Examples of Viable Properties
- Real Estate Market Analysis and Property Options
- Financial Feasibility Considerations
- Zoning Considerations
- Partnership Possibilities
- Implementation Plan



Introduction and Objectives

Introduction and Objectives

- Facilitate a focused discussion on the new OCA Chancery, which includes type of facility, location, and other considerations
- Bring the Metropolitan Council and the Church as a whole a step closer to identifying a viable Chancery property and successfully bidding on it
- Understand the market opportunities and constraints of the Northern Virginia / Washington DC Metro area
- Understand the financial opportunities and constraints of the OCA at this time

Requests

1. Authorize an agent of OCA (e.g., Fr. Alessandro Margheritino) to contract the Realtor we have been informally using
2. Authorize an agent of OCA to sign and submit an offer on identified properties
3. Authorize an agent of OCA to negotiate terms and enter into a loan agreement for the acquisition of property
4. Authorize an agent of OCA to enter into a Purchase Agreement

Note: The final execution of a Purchase Agreement will be conditioned on a customary due diligence period and final approval by the Metropolitan Council and Holy Synod

Criteria for a New Property

Current State – Temporary Chancery Office

Inadequate space, limiting size, accessibility issues, and maintenance concerns, market risk for lease pricing beyond active term

Desired Size

- 6,000-9,000 square feet for ~8 office staff
- Minimum of 5-10 parking spots available
- Conference room to host the Holy Synod (up to 20 people)
- Space for storage and a small chapel, within the facility or on the ground

Desired Location

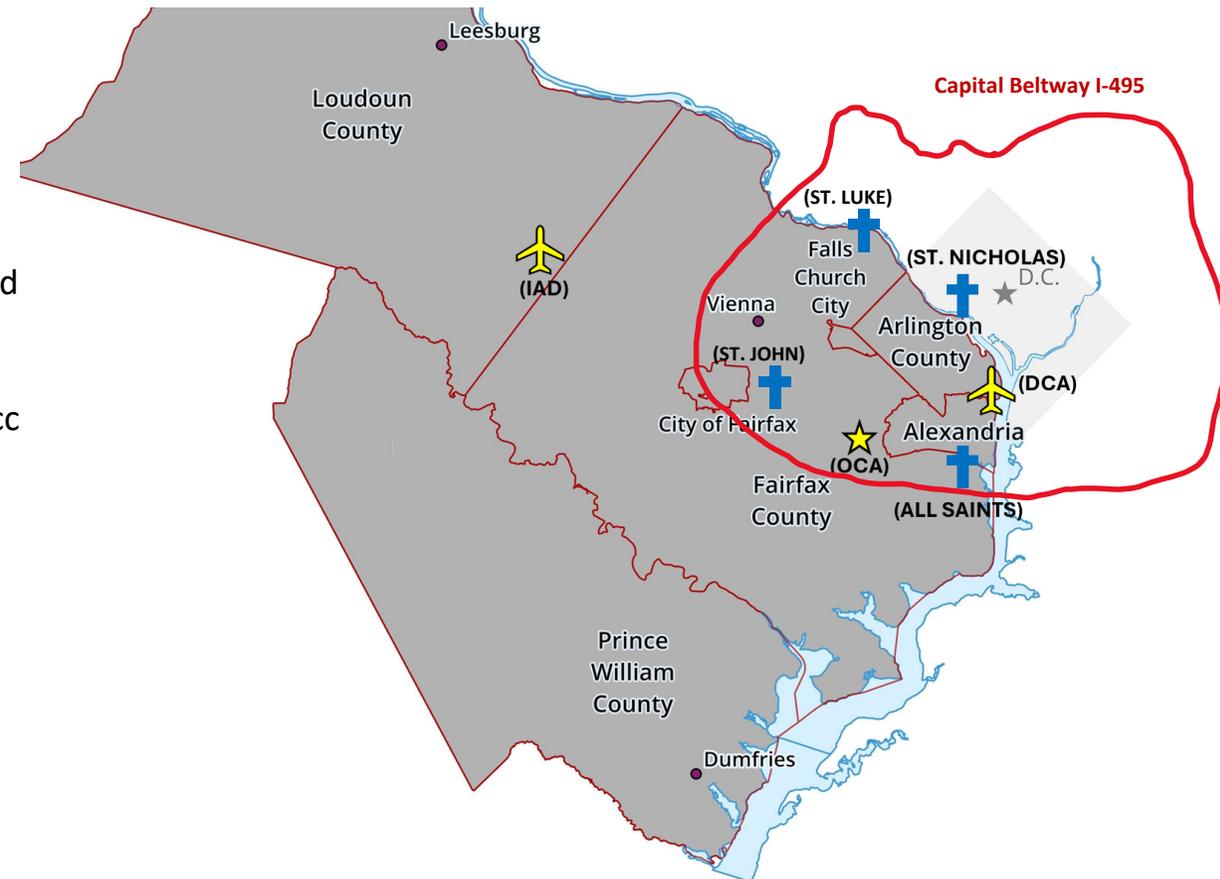
Safe area in proximity (within 45 minutes) to airports, train, and highway access as well as to the Archdiocesan Parishes.

- City of Alexandria, VA
- Fairfax County, VA
- Arlington County, VA
- City of Fairfax, VA
- Prince William County, VA
- Loudoun County, VA

Type of Property that is Viable

- Religious facilities (Churches, Religious Offices, etc.)
- Social infrastructure facilities (Schools, Daycares, Non-profits)
- Large residential mansions where zoning allows Church use

Northern Virginia / Washington DC Metro Area



Constraints of the Area

- Its materially more expensive than most other places in the United States
- Properties listings move fast, and inventory is constrained
- Federal government as principal employer or client continues to grow directly (as principal employer) or indirectly (as client to contractors)
- Northern Virginia is spatially constrained, so plots available to build come with steep competition from developers
- Competitors are often developers or high-income individuals, making it challenging for deliberative bidders
- OCA is unlikely to find a perfect property, and the biggest impediment when finding a viable property will be the ability to move fast through the competitive offer process

Northern Virginia/ Washington DC Metro Area (2024)	Median Home Price: \$1,057,988 +161%	Median Rent: \$3,216/month +134%	Average Days on Market: 27 -23%	Supply of Inventory: 0.8 months -76%	Median Household Income: \$142,583 +77%
National Average (2024)	Median Home Price: \$404,400	Median Rent: \$1,373/month	Average Days on Market: 35	Supply of Inventory: 3.3 months	Median Household Income: \$80,610

Recent Examples of Viable Properties

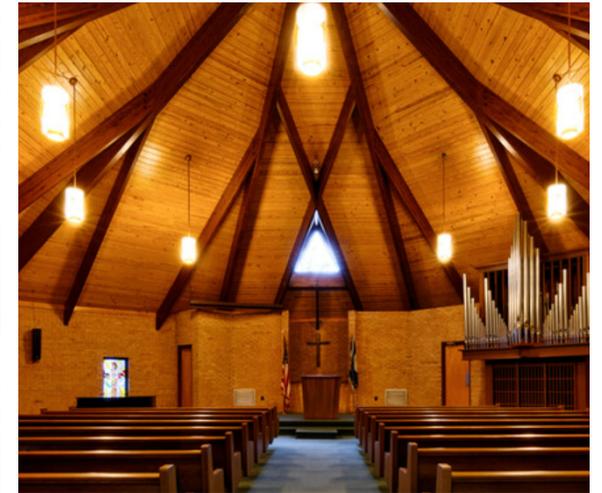
Word of Grace Church
13832 Redskin Dr, Herndon, VA



Ethiopian Orthodox Church
2912 King St, Alexandria VA



Community of Christ Church
5610 Inverchapel Rd,
Springfield, VA



Lot Size (Acres)

8.00

1.33

Lot Size (Acres)

Facility Size (sqft)

34,000

11,845

9,840

Sale Price (over/under list)

\$25M (+48%)

\$3.1M (+13%)

\$3.0M (pending)

Days on Market

28

74

18

Notes

To be used as Data Center, next to Dulles (IAD) airport

90 Parking Spaces

No longer listed as active

Real Estate Market Analysis and Property Options

Indicative Pricing Range

- At the desired 6,000-9,000 square feet at \$342/sqft, a new OCA Chancery would cost in the range of \$2.0 - \$3.0 million
- This pricing range may need to increase in order to mitigate the market risk of asset price growth and the competitive environment

Comparable Proxies - Religious, Industrial and Commercial Properties

Address	Area	Sale Date	Acres	Price	Square Footage	\$/sqft	Type	Zoning
5610 Inverchapel Rd, Springfield, VA 22151	Fairfax County, VA	Under contract	2.57	\$ 3,025,000	9,840	\$ 307.42	Religious	R3
25350 Poland Road, Chantilly, VA	Fairfax County, VA	Under contract	6.58	-	12,500	-	Religious	CLI
4401 16th St NW, District of Columbia	DC	2025	0.47	\$ 3,000,000	16,406	\$ 182.86	Religious	R-1-B
2912 King St., Alexandria, VA	City of Alexandria	2024	1.38	\$ 3,100,000	11,845	\$ 261.71	Religious	R8
1710 Mount Vernon Avenue, Alexandria, VA 22301	City of Alexandria	2024	0.35	\$ 2,200,000	5450	\$ 403.67	Industrial	-
811 Montgomery St, Alexandria VA	City of Alexandria	2024	0.06	-	2,411	-	Religious	RB
901-903 N Alfred St, Alexandria VA	City of Alexandria	2024	0.11	-	4,277	-	Religious	RB
4107 Winchester Rd, Marshall, VA	Fairfax County, VA	2024	1.23	-	2,500	-	Religious	C1
13421 Twin Lakes Dr, Clifton VA	Fairfax County, VA	2024	3.70	\$ 8,050,000	34,000	\$ 236.76	Religious	R-C
13832 Redskin Drive Herndon, VA 20171 (Word of Grace Ct	Fairfax County, VA	2024	8.00	\$ 25,000,000	34,000	\$ 735.29	Religious	-
11804 Nokesville Rd, Bristow, VA	Prince William Co, VA	2024	2.19	\$ 1,500,000	4,440	\$ 337.84	Religious	-
14401 Telegraph Rd, Woodbridge, VA	Prince William Co, VA	2024	3.21	\$ 7,000,000	40,000	\$ 175.00	Religious	B1
432 M St. NW, District of Columbia	DC	2024	0.11	\$ 2,385,000	3,488	\$ 683.77	Religious	RA-2
2701 Military Rr NW, District of Columbia	DC	2024	1.32	\$ 7,000,000	27,846	\$ 251.38	Religious	R-1-A
1611 16th St NW, District of Columbia	DC	2024	0.22	\$ 5,260,000	16,150	\$ 325.70	Religious	RA-4
4821 Georgia Ave NW, District of Columbia	DC	2024	0.11	\$ 2,120,000	8,352	\$ 253.83	Religious	MU4
2033 11th S NW, District of Columbia	DC	2024	0.33	-	7,047	-	Religious	ARTS-2
7146 Beulah St, Alexandria, VA 22315	City of Alexandria	2022	0.50	\$ 765,000	1,368	\$ 559.21	Religious	-
6550 Loisdale Ct, Springfield, VA 22150	Fairfax County, VA	2022	2.29	\$ 11,210,000	64315	\$ 174.30	Commercial	-
7307 Highland St, Springfield, VA 22150	Fairfax County, VA	2022	4.25	\$ 10,220,018	48560	\$ 210.46	Commercial	I-3
1731 Great Falls St, McLean, VA 22101 (land sale)	Fairfax County, VA	2022	4.10	-	-	-	Religious	-

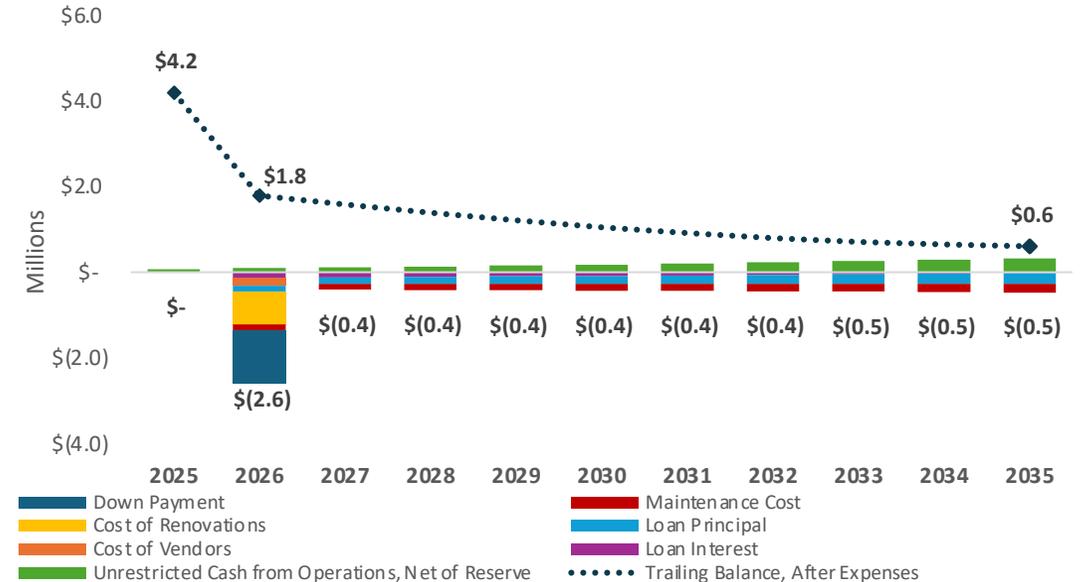
Min	\$	174.30	per sqft
Average	\$	342.27	per sqft
Max	\$	735.29	per sqft

Financial Feasibility Considerations

Key Questions

1. Can OCA afford to buy a Chancery without proceeds from the Westwood property sale or additional gifts? *Not without additional inflows*
2. Can OCA buy land to build once the Westwood proceeds materialize? *In theory yes, but land is expensive (~\$1.5M/acre), construction is complex, inventory is low, and competition is high*
3. Can OCA buy outright once the Westwood proceeds materialize?
4. Can OCA finance a Chancery property? We are exploring, but:
 1. *Borrowing from the Endowment or against the Endowment (pledging its assets as collateral) will be challenging and require legal process, per NY UPMIFA (per General Counsel).*
 2. *Borrowing short-term financing from Philadelphia Trust Company, our endowment manager, with the property and a portion of unrestricted funds collateralizing the short-term loan may be possible.*
 3. *Borrowing short- or long-term financing from a commercial bank is also possible.*

Hypothetical Financial Feasibility at Market Assumptions



Westwood Sale Year	2025	New Chancery Purchase Year	2026
Westwood Sale Price, Net		Loan Term	
Needed Sqft		Interest Rate	
Price per Sqft		Lender's Loan-to-Value Ratio	
Implied Price		Mortgage Size	
Ops and Maintenance Unit Cost		Down Payment	
Cost of Ops and Maintenance			
Vendors as a % of Purchase Price			
Cost of Vendors			
Renovations Unit Cost			
Cost of Renovations			

Zoning Considerations

Certain properties may require special permits (SP), Special Exemptions (SE) or in rare instances re-zoning.

Fairfax County, VA

TABLE 4101.1: Use Table for Residential, Commercial, and Industrial Districts

P = permitted; SE = special exception; SP = special permit; blank cell = not allowed
A = allowed as accessory use only; A+ = permitted as an associated service use; AP = allowed with approval of administrative permit

Use	Residential Districts															Commercial Districts								Industrial Districts						Use-Specific Standards NOTE: General Standards also apply
	R-A	R-C	R-E	R-1	R-2	R-3	R-4	R-5	R-8	R-12	R-16	R-20	R-30	R-MHP	C-1	C-2	C-3	C-4	C-5	C-6	C-7	C-8	I-1	I-2	I-3	I-4	I-5	I-6		
Convention or Conference Center																														4102.4.G
Cultural Facility or Museum		SE	SE	SE	P	P	P	P	P	P			SE	SE	SE															
Public Use	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P		
Religious Assembly		SP	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	P	4102.4.H									
Religious Assembly with Private School, Specialized Instruction Center, or Child Care Center		SP SE	P	P	P	P	P	P	P	P	P	P	P	P	P	P	4102.4.I													

City Of Alexandria, VA

	Allows use as church		Allows use as church
R-20/Residential Zone	Yes	CR/Commercial Regional Zone	No
R-12/Residential Zone	Yes	OC/Office Commercial Zone	Yes
R-8/Residential Zone	Yes	OCM(50)/Office Commercial Medium Zone	Yes
R-5/Residential Zone	Yes	OCM(100)/Office Commercial Medium Zone	Yes
R-2-5/Residential Zone	Yes	CRMU-L/Commercial Residential Mixed Use (Low) Zone	No
RS/Townhouse Zone	No	CRMU-M/Commercial Residential Mixed Use (Medium) Zone	Yes
RT/Townhouse Zone	No	W-1/Waterfront Mixed Use Zone	Yes (SP)
RMF/Residential Multi-unit Zone	Yes	CRMU-H/Commercial Residential Mixed Use (High) Zone	Yes (SP)
RM/Townhouse Zone	Yes	CD/Commercial Downtown Zone	Yes (SP)
RA/Multi-unit Zone	Yes	CDX/Commercial Downtown Zone (Old Town North)	Yes (SP)
RB/Townhouse Zone	Yes	CRMU-X/Commercial Residential Mixed Use (Old Town)	Yes (SP)
RCX/Medium Density Apartment Zone	Yes	OCH/Office Commercial High Zone	Yes (SP)
RC/High Density Apartment Zone	Yes	CDD/Coordinated Development District	Yes
RD/High Density Apartment Zone	No	I/Industrial Zone	No
CL/Commercial Low Zone	Yes	UT/Utilities and Transportation	No
CC/Commercial Community Zone	Yes	POS/Public Open Space and Community Recreation Zone	Yes (SP)
CSL/Commercial Service Low Zone	Yes	WPR/Waterfront Park and Recreation Zone	Yes (SP)
CG/Commercial General Zone	Yes		

Partnership Possibilities

Local Government Partnering Pros and Cons:

- Potential Areas of Interest: People who work at the OCA Chancery will live and conduct commerce in the vicinity of the office, and as such will spend and patronize nearby locations
- Potential Drawbacks: As a tax-exempt entity, OCA will not contribute to City or County revenue, and may be lower on the priority of local authorities

State Level

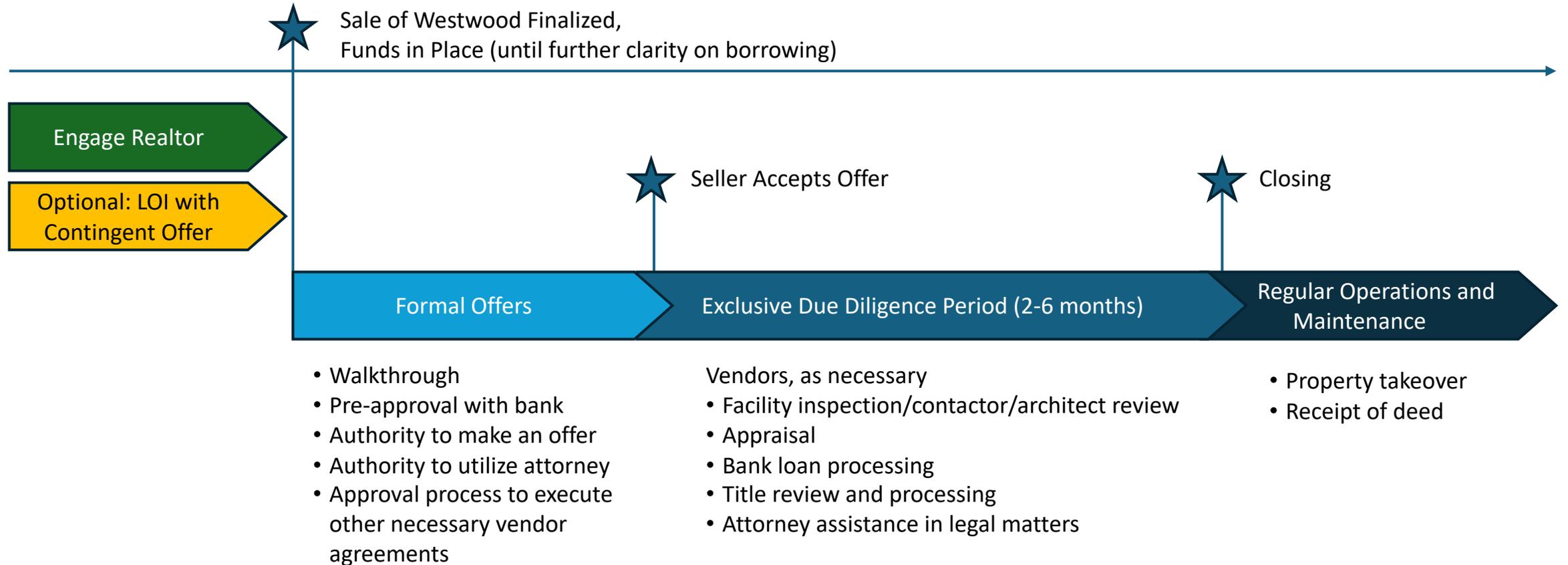


County Level

(Note: City of Alexandria is self-incorporated historical jurisdiction that functions as a County)



Implementation Plan



Need: An ability to act fast with contingent or formal offers will allow OCA to move quickly and be competitive. Given the realities of the market, the faster OCA can “lock-in” or “filter” relevant sellers, the more likely it is to mitigate the competitive forces and inventory scarcity in the region

Orthodox Church in America 2024 Internal Audit Report - Details

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

Our purpose as internal audit is to evaluate the OCA's risks, controls, and processes to ensure compliance with laws, regulations, and internal policies, to safeguard the OCA's assets, identify potential issues, and provide recommendations to improve operational efficiency and enhance the OCA's control environment.

One of the most effective internal controls is the "tone at the top". When top management encourages and emphasizes the importance of compliance with internal controls, the organization is more likely to have successful implementation of controls that provide security of the organization's assets.

During 2024, we continue to collaborate with the Treasurer and the Chazen Accounting Team to ensure and develop internal controls for the Accounting and Finance Operations of the OCA. Much of our report suggests implementing specific internal controls and highlighting improvements made.

Internal controls

As part of our review, we completed a Fraud Risk Assessment with the Treasurer and identified the check deposit process as an area needing improvement.

There are additional controls that can be put in place to manage the check deposit process at the Chancery office. We discussed with the Treasurer the ideal procedure and he will work to implement and improve the process. Several ideas are to stamp the checks 'For Deposit Only' when the mail is opened, creating a deposit slip of all checks as they are opened, reconciling the scanning of the checks to the deposit slip to ensure no checks are missing. Using two people within the Chancery office to complete the procedure. The internal auditors will review the improved process during the next audit.

Other recommendations for internal controls are noted below:

Accounts Payable and T&E expenses:

- Recommend that Quickbooks vendors that have not been used in the last 2 years should be deactivated. Use the bill.com vendor list to make that determination.
- Advise all Amex card holders that 'pay over time' should generally not be used without the approval of the OCA Treasurer.
- Chazin needs to be reminded that all receipts should be uploaded into Quickbooks. See if there is a mechanism to interface the attachments between Bill.com and Quickbooks.
- Create a report to segregate recurring stipends out of recurring payment list for ease of review.

- Nonrecurring stipends, although funded through Lilly grant should be on a list with description of services provided.

Accounting Policies & Procedures:

- While some policies have been updated, we recommend the Treasurer continue to get the accounting policies & procedures updated as they are over 10 years old.
- These policies and procedures should include IRS and other regulatory guidelines as well as what is considered appropriate audit support for programs. It is important that policies & procedures be followed by everyone within the organization.
- Should the Treasurer or others in the OCA administration not have the bandwidth to complete this task, we encourage the engagement of a company or individual knowledgeable in the development of finance & accounting policies and procedures to assist with this task.

Accounting adjustments

There were two reclass adjustments identified in our review. The Treasurer will have Chazen book the entries needed.

- There are stipends under 6214 Outside Consult Services that should be reclassified to the 6650 Stipends account.
- Mission Distribution – Account 6052. This account included a \$15,000 donation to OCF that we discussed should be reclassified to the 6050 Distributions - Grants & Endowments.

Investments/Restricted & Unrestricted Funds

Relative to investments, restricted & unrestricted funds, all these Assets accounts are reconciled showing the opening balance, monthly transactions/interest/dividends and ending balance showing gain/loss on investment. Quarterly, the Treasurer is reconciling his external Treasury report by asset classes to Quickbooks. This reconciliation allows all reports to be traced back to OCA detailed financial records and provides additional comfort that all accounts have been fully and accurately reported. The Treasurer was in the process of preparing his Annual true up, so we were unable to review that report during our Audit. The Treasurer will be forwarding along once completed.

Motions that impact financials are reviewed.

Fall 2023-Fall 2024 Metropolitan Council meeting minutes were reviewed during the Audit. The OCA process for including Parishes in the 501-C-3 list appears to be in place. We recommend that Fr. Alessandro should remind the Diocesan Treasurers of their responsibilities to report new missions to the OCA Secretary for the inclusion in the 501-c-3 process to be effective.

Stavropegial institutions

St. Tikhon’s Seminary Audited Financial Statements

The Seminary received an unqualified audit opinion from the external auditors on its 2024 financial statements. No questions or issues noted.

St. Vladimir’s Seminary Audited Financial Statements

We were unable to review the 2024 Audit report for St Vlad's as it was not completed. Changes in the administration at the Seminary may have impacted getting information to the auditors in a timely

fashion for them to complete the audit. We expect to be able to review the report subsequent to this report.

Non-audited Institutions

Our review of the following non-audited institutions, St. Catherine's, New Skete Nuns, Monks, and Monastery relies on basic financial reports provided by those institutions. For the future, we would suggest an expanded review of these institutions, at least on a periodic basis, which would include a review of detailed accounting reports that support the financial statements provided. Internal audit does not have the ability to determine whether internal controls have been implemented or are followed at these Stavropegial institutions.

For 2024 we were unable to review New Skete financials as they were not ready yet. We had one question on St. Catherine's financials, regarding the 100K ruble increase in Salaries. No specific individual's name was noted in the report just that it was for Security Guard. We are aware that Father Daniil Andreyuk looks at the Financials and forwards them to the Treasurer. The Treasurer to follow up with Father Daniil.

St. Tikhon's Monastery Financial Statement Review

We were unable to review the 2024 Financial Review for St Tikhon's Monastery as it was not provided.

In closing, we would also like to note the number of internal control and process improvement recommendations included in last year's report that have been implemented by the OCA Administration:

- The process of approving expenses.
- Ensuring proper distinctions between W2 employment and 1099 contracting and documentation for both types of arrangements.
- Chazin now performs Payroll Function, Treasurer performs review and approval.
- Payroll increases are properly documented along with Pension contributions and calculation for pension remittance.
- Stipends reviewed for recurring and non-recurring.
- Because of the complications of restricted funds, QuickBooks financial reports do not tie directly to financial reports presented to the Metropolitan Council. The Treasurer is performing a reconciliation, and it is included in the reporting package presented to the MC.
- In 2024, a sweep account was created to consolidate funds into an interest-bearing account. The Chazin reconciliation reports were helpful to ensure the balances in the bank statements match the balances on the financial reports.
- The Finance & Accounting Team moved to a higher tier of commercial banking with TD Bank.
- A full reconciliation of the AR aging was performed and resolved.

Respectfully Submitted:

Matushka Sharon Hubiak, Chair

Maha Adranly, Member

Diane Dorogy, Member



Pension Office
P.O. Box 8121
Hicksville, NY 11802-8121
Tel/Text: 516-464-0322
Fax: 516-464-0367
Email: pension@ocapension.org

January 17, 2025

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

We submit this Pension Plan report and attached documents to the Metropolitan Council for its Spring 2025 meetings.

Since our last report, the Pension Board has held an in-person board meeting in December in New York. Fr. Alessandro Margheritino, Chancery liaison to the Pension Board, attended the meeting. Fr. Justin Griffing, elected clergy alternate, attended the meeting as a new board member to replace Fr. Chad Hatfield, who resigned upon retirement.

Investment Performance

The Pension Plan assets continue to be invested in a diversified portfolio of equities, fixed income, and alternative investments. The asset allocation includes a low-volatility portion similar to cash in the amount of eighteen months of monthly cash requirements. This allows the portfolio to remain intact in periods of market decline by having sufficient cash available. Ongoing improvements in cash flow have resulted in the monthly contributions exceeding the monthly benefits payable. Therefore, it has **ELIMINATED** the monthly cash transfer from our investment portfolio. Please refer to the cash flow detail schedule. We have also opened an interest yielding money market account to earn interest on the funds that accumulate monthly before benefit payments.

The marketable securities portfolio, including the low volatility portion, managed by Morgan Stanley, earned 7.6%, net of fees for the 12-month period ending December 31, 2024. This compares to 11.5% earned for the same period by our benchmark representative of an asset allocation of 60% global equities, 35% intermediate bonds, and 5% cash. The S&P 500 Index earned 25% vs. the S&P 500 equally weighted performance of 13% for the same period, thus showing the effect of the “Magnificent Seven” on the cap weighted stock market indices.

The performance of non-marketable alternative investments is subject to delayed reporting of 1 to 5 months and therefore their recent performance is not yet reflected in the above Plan’s total performance. Because of this, the Plan’s performance is best evaluated over a longer period of time. These investments produced an average net return of 3.6% per year during the 3-year period ending September 30, 2024. Our Plan’s benchmark for that period returned 5% per year.

Total Plan assets as of December 31, 2024 were \$26,361,280.

Total Plan assets as of December 31, 2023 were \$24,472,025.

Participation:

As of December 31, 2024, there are 392 active participating members (including 48 members who participate via more than one employer) and 14 inactive members for a total of 406 active/inactive participants. In addition, there are currently 246 total monthly benefits recipients. (Some recipients may be sharing one member’s benefit, as in the case of children sharing a father’s benefit.)

As of January 1, 2025, all eligible “OCA employees” are to have become participants in the Plan. By January 15, 2025, active participants increased to 404 (including 52 members who participate via more than one employer).

Additionally, the amendment mandating parishes to contribute the employer 14% portion to the Plan monthly if they have inactive members, ineligible members, and/or non-compliant members became effective January 1, 2025 for the parish employer portion. As of January 15, 40 parishes are enrolled in the system and remitting or preparing to remit the parish portion.

Actuarial Valuation

Our actuarial firm Gabriel, Roeder, Smith & Company (GRS) has been engaged to prepare a valuation report for the Plan as of January 1, 2025. We expect this to be available before the All-American Council scheduled in July 2025. Thus, there is no new actuarial report included as an Exhibit.

Michael Stieglitz, Plan Administrator, has been working diligently to have our member records in order and properly documented, so that the valuation will be as accurate as possible.

Agreed-Upon Procedures:

Barnes Wendling CPAs, the Pension Plan’s independent accounting firm, has been engaged to perform an Agreed-Upon Procedures (AUP) engagement for 2024 at the same fee as the 2023 report.

Administration:

Michael Stieglitz continues to work with parish treasurers and members who call for training on the MARC system. He is available upon request to demonstrate the system capabilities and train personnel to input the compensation data, calculate the contribution amounts, and locate historical parish information. Michael is also available to prepare customized individual projections of termination and retirement benefits.

Michael has been working with the Dioceses and parishes to obtain contact and compensation information required for updating the MARC system for all new participants and parishes onboarding January 1, 2025. We appreciate the assistance from the Dioceses and cooperation from the parishes which has allowed us to make the progress indicated.

As a reminder, any member can text the office or text the Pension Administrator Michael Stieglitz directly at 516-464-0415.

Proposed Plan Amendments:

The Pension Board does not have any plan amendments to present to the Metropolitan Council with this report.

Specific request for the Metropolitan Council:

The Pension Board does not have any specific requests for the Metropolitan Council with this report.

Additional information provided:

We have provided the following Exhibits for further discussion with the Metropolitan Council:

- A. Gabriel, Roeder, Smith & Company - Actuaries
 - No new exhibits at this time.
- B. Barnes Wendling CPAs
 - No new exhibits at this time.
- C. Cash flow
 - Actual 2024, 2023 and 2022 figures with projected 2025 figures
- D. Administrative expenses detail: Unaudited actual 2024 vs. budget, and 2023-2021 actual.
- E. Participation statistics
- F. Investment Summary – as of December 31, 2024

Conclusion

We appreciate the time and energy everyone has contributed towards the progress which we have made. We look forward to seeing you at the All-American Council in Phoenix!

Please keep us in your prayers.

Respectfully yours in Christ,
The Pension Board

His Grace, Bishop Gerasim, Episcopal Moderator
Bishop of Fort Worth
Auxiliary to the Diocese of the South

Matushka Mary Buletza Breton, Chair
Fr. John Dresko
Fr. Matthew Tate
Fr. Justin Griffing
Ms. Mary Ann Bobulsky
Mrs. Melanie Ringa

Report of the Pension Committee of the Metropolitan Council to accompany the spring 2025 Pension Board report to the Metropolitan Council

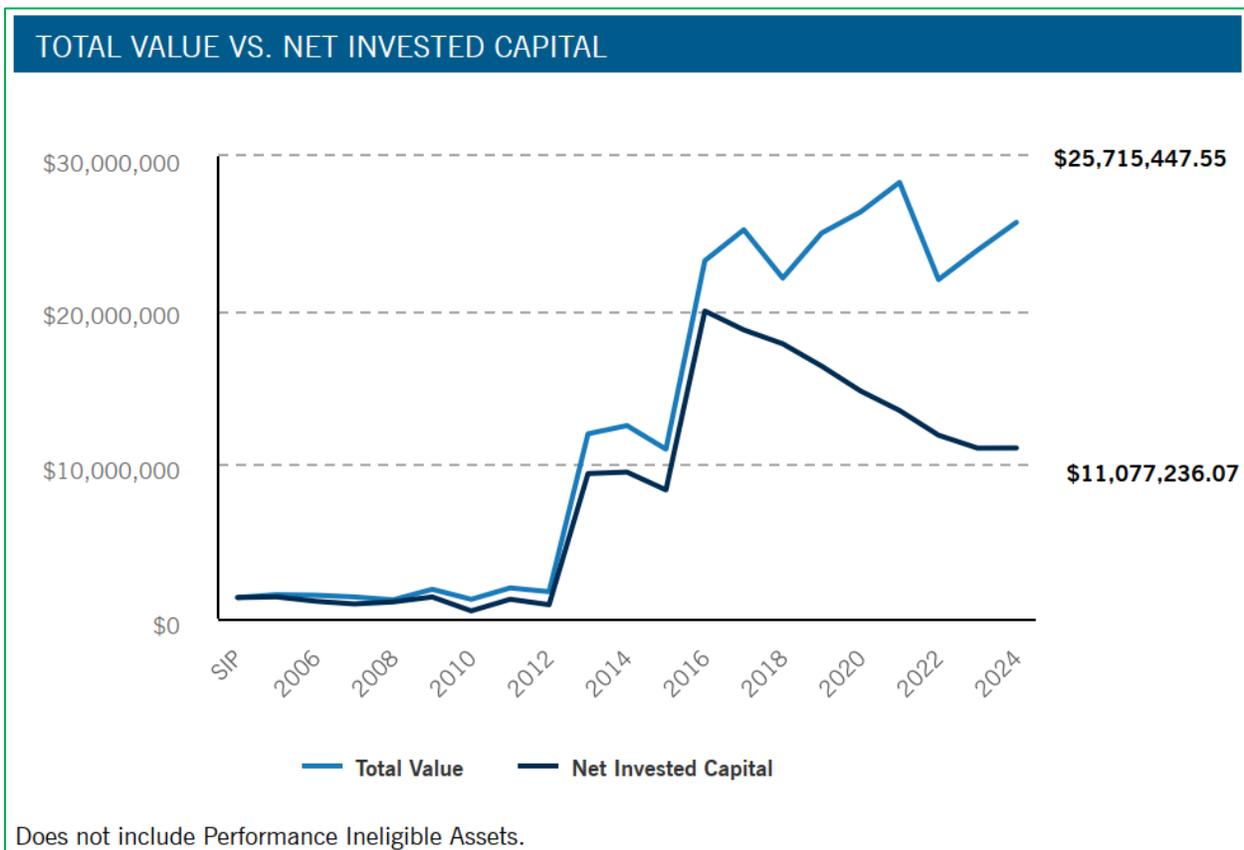
Cash Flow

The cash flow was turned around and has been quite positive for the past 3 quarters. The increased contributions have allowed the Pension Board to remove cash from low return investments and direct that money into higher yield investments. This investment strategy is expected to continue.

Investment Performance

It took us some time to understand Exhibit F, the Morgan Stanley “Total Detailed Performance Report [as of] 12/31/24”. Melanie Ringa of the Pension Board and Joshua Godbold met with Warren Rivetz, a financial advisor at Morgan Stanley, and the following comes from the explanations that Mr. Rivetz provided.

The conversation with Mr. Rivetz revolved mostly around pages four and five of the report. The following graph is found on page five.



The (light) blue line of “Total Value” represents the market value of the assets held at Morgan Stanley. The dark blue (or possibly black) line, “Net Invested Capital”, shows money coming into and out of the fund. Thus, when the “Net Invested Capital” goes upward, there is external money (NOT investment gains) flowing into the Fund, and when that line goes down, money has been withdrawn from the Fund.

From 2012 to 2013, about \$9M was put into the Morgan Stanley fund, and from mid-2015 to 2016, perhaps another \$11M was added. Assets were removed in the 2015-2016 frame before the big \$11M addition, and then, right after the asset addition in 2016, we can see a continuous drawdown of assets until about 2023. Note that this drawdown is NOT investment loss. Overall, the fund maintained a relatively steady value from 2016 onward despite continuous withdrawals of almost \$9M. In this period, the Pension Board was using the earnings from the Plan to pay for ongoing expenses.

Instead of a graph, the following table, also found on page five, gives a summary of the results over the last quarter, the last year, and the last eight years.

DOLLAR-WEIGHTED RETURN % (NET OF FEES)			
	Quarter to Date (\$) 09/30/24-12/31/24	Year to Date (\$) 12/31/23-12/31/24	Custom Period (\$) 12/31/16-12/31/24
Beginning Total Value	25,983,116	23,907,189	23,228,094
Net Contributions/Withdrawals	50,000	8,975	-8,884,402
Investment Earnings	-317,669	1,799,284	11,371,755
Ending Total Value	25,715,448	25,715,448	25,715,448
DOLLAR WEIGHTED RATE OF RETURN (%) (Annualized for periods over 12 months)			
Return % (Net of Fees)	-1.22	7.52	6.13

If we look at the rightmost column, the value of the fund at the end of 2016 was about \$23.2M. Over the next eight years, \$11.4M was earned and \$8.9M withdrawn. It is an error to say *the fund made \$11.4M on \$23.2M over eight years for a time-averaged annual return of 5.1%*. This assertion could be stated mathematically as follows, but even though the equation is correct, the underlying assumption is wrong.

$$\$23,228,094 \times (1 + 5.1\%)^8 = \$23,228,094 + \$11,371,755 = \$34,599,849$$

The reason this assertion is incorrect is that the withdrawals reduce the amount of principal available to earn interest.

The “dollar weighted rate of return” DOES account for this, and that is why one sees a 6.13% rate of return instead of the incorrectly calculated 5.1%, above. Note that this is the rate of return without accounting for certain fund management fees which are not listed in the Morgan Stanley report. Melanie Ringa looked at a different document to find the total advisory fees in 2024 were \$167,455.49 or about 0.68% of the fund value averaged over the year. (This does not include the fees in various funds that are already baked into the overall return of those funds.)

On the previous page, page four, is a “time weighted” performance summary. Had there been neither contributions nor withdrawals, then the time weighted and dollar averaged numbers would align. The time weighted performance summary allows one to compare the investment performance of the Pension Plan holdings with that of other indices.

One recurring question has been why there is an additional index of the “S&P 500 equal weighted” (“Equal Wtd”). The S&P 500 index tracks the 500 largest publicly-traded US corporations by market capitalization. It is a measure, therefore, of the performance of the large-capitalization sector of the US economy. The top ten companies in the index, as of January 31, 2025, are as shown in this snapshot.

Top 10 Constituents By Index Weight

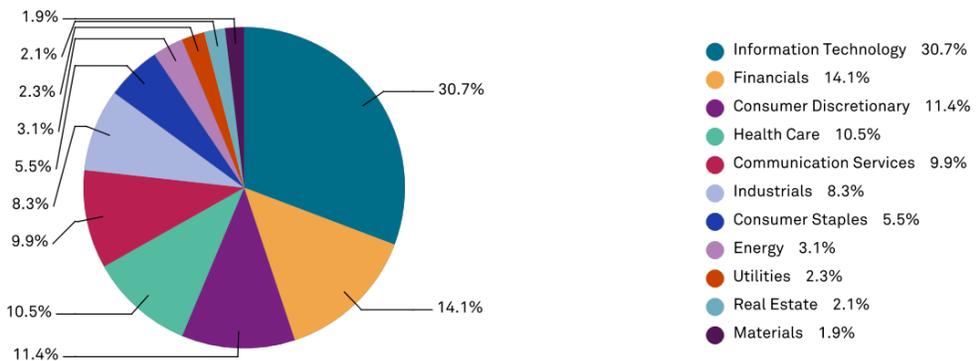
CONSTITUENT	SYMBOL	SECTOR*
Apple Inc.	AAPL	Information Technology
Microsoft Corp	MSFT	Information Technology
Nvidia Corp	NVDA	Information Technology
Amazon.com Inc	AMZN	Consumer Discretionary
Meta Platforms, Inc. Class A	META	Communication Services
Alphabet Inc A	GOOGL	Communication Services
Tesla, Inc	TSLA	Consumer Discretionary
Broadcom Inc	AVGO	Information Technology
Alphabet Inc C	GOOG	Communication Services
Berkshire Hathaway B	BRK.B	Financials

*Based on GICS® sectors

Taken from the S&P 500 MYR factsheet downloaded from <https://www.spglobal.com/spdji/en/indices/equity/sp-500/#overview>

Below is a “sector” breakdown showing the market capitalization of different sectors in the S&P 500 group of companies.

Sector* Breakdown



*Based on GICS® sectors

The weightings for each sector of the index are rounded to the nearest tenth of a percent; therefore, the aggregate weights for the index may not equal 100%.

Taken from the S&P 500 MYR factsheet downloaded from <https://www.spglobal.com/spdji/en/indices/equity/sp-500/#overview>

Since the S&P 500 is weighted by market capitalization, several very large companies such as the top 10, shown above, will skew the overall performance of the index toward the performance of those companies. The “S&P 500 Equal Wtd” is a different indicator of “large cap” stock market performance; it will look at the performance of a wider array of US large cap companies with each company having an equal weight in the index. The investing criteria for Plan funds include “concentration risk” criteria both in individual companies and “sectors”, thus the S&P 500 Equal Weighted index is a benchmark better aligning with the Fund’s investment criteria.

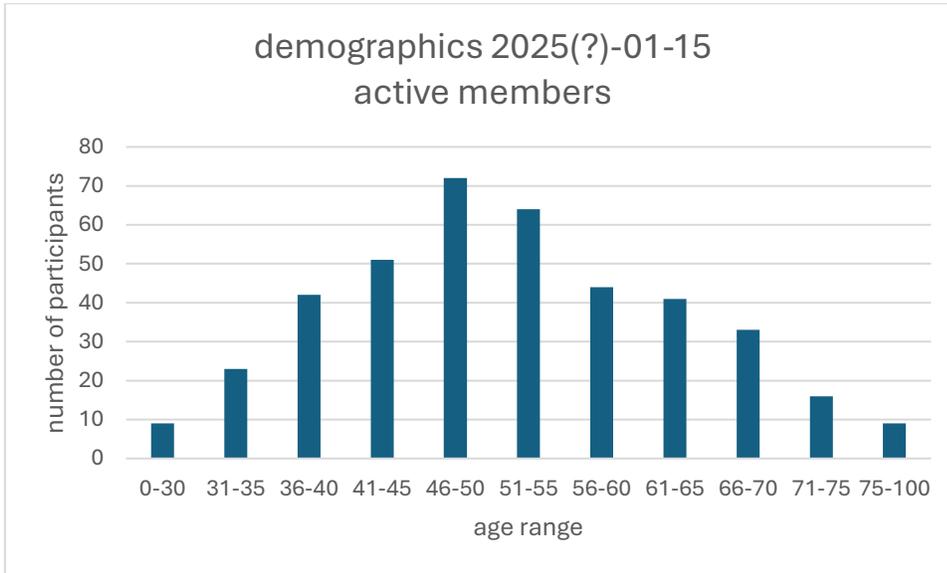
Rivetz confirmed that with the improved cash flow in the Plan, the low volatility cash reserves, which have a low rate of return, will be reduced as a proportion of the total portfolio. Given the current positive cash flow situation, one might ask why the cash reserves are not eliminated, altogether. The Plan has some lump-sum cash-out options that retirees can take, and there is uncertainty around who might take these and when, thus the Plan must maintain some cash reserves to pay these events without having to liquidate investments in a down market.

Actuarial Valuation

Will be provided after the Pension Board meets in May.

Demographics

The demographics table in Exhibit E might have a typo in the year of the last column. The demographic information in Exhibit E has been converted to a graph below. The last four columns have 100 people in it who could retire tomorrow.



The Pension Board provided an overview of eligible non-participating clergy. 25 Eligible Clergy are not participating in the pension plan, 24 of these clergy are from Ethnic Diocese. 34 Clergy have aged out of the pension plan and are not eligible to participate.

Administration

The legal expenses have continued to increase. The 2025 budget for legal fees is \$89,400.00. There is no amount budgeted for legal fees overage even though three of the past four years there were overages of \$12,000, \$20,500 and \$15,000.00. The Pension Board attorney, Joe Semo is paid a monthly retainer. He provides itemized bills to the Pension Board. If the monthly retainer is not used a credit is issued. The Pension Board consults Joe Semo if there are questions about the plan.

Respectfully submitted,

The OCA Metropolitan Council Pension Committee

Donna Dimitri, chair

Archpriest David Garretson

Priest John Parker

Joshua Godbold

Orthodox Church in America

Treasurer's Report

Metropolitan Council – February 2025

Your Beatitude, Reverend Fathers, brothers and sisters,

Greetings in Christ!

We recently completed another busy, but successful year of financial management of the Orthodox Church in America. Along with the day-to-day transactions of the church, during 2024, we:

- Worked closely with the Office of Pastoral Life to implement both the Thriving in Ministry continuing grant and the new Economic Challenges Facing Pastoral Leaders (OCA Financial Health Initiative) grant, both significant multi-year grants from the Lilly Endowment;
- Participated in ongoing discussions and planning regarding the sale of the Westwood property and the future purchase of property to serve as a permanent Chancery location in the metro-Washington D.C. area;
- Successfully completed the 2023 external audit;
- Continued to implement new internal controls and improve processes, consistent with the Internal Audit Committee's recommendations; and,
- Began preparing for the financial management of the All-American Council in 2025.

What follows is the Treasurer's update on the finances of the OCA through the end of 2024. As you review these items in preparation for the Metropolitan Council meeting, please feel free to contact me at asmith@oca.org with any questions.

Fiscal Year 2024 – Preliminary Annual Results

Enclosed as **Attachment A** is the year-end Treasurer's Report for 2024 OCA operating activities at 12/31/2024. The report includes:

- Statement of Operating Activity – Unrestricted
- Statement of Operating Activity – Restricted
- Comparative Balance Sheet for 12/31/2024 and 12/31/2023

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

Overall, revenue collection for the year was above expectation (105.28% of budget), with Diocesan contributions also coming in just above expected budget. Unrestricted giving was much higher than

expected due to several significant one-time gifts. Expenses were below anticipated budget (99.26% of overall expense budget) which resulted in an overall anticipated increase in unrestricted net assets of roughly \$150K, which does **not** include any of the budgeted draw on unrestricted reserve as use of this reserve was not needed.

In addition to the annual operating activity (unrestricted revenue and expense), the following endowed fund investment activity is provided, showing a \$1.36 million (35.84%) increase in value from 12/31/2023 to 12/31/2024:

	Market Val.	Market Val.	Annual Rate
Investment Accounts	12/31/2023	12/31/2024	of Return
Main Endowment Fund, incl Rotko	2,001,331.70	2,814,940.46	40.65%
FOS Endowment Fund	148,241.18	233,943.51	57.81%
St. Andrew Endowment Fund	151,730.46	195,586.25	28.90%
	2,301,303.34	3,244,470.22	40.98%
Kavalenko	64,809.64	66,913.99	3.25%
OCCIF N/R (Mission Fund)	150,000.00	150,000.00	0.00%
Missions Fund	1,287,168.32	1,704,859.84	32.45%
	1,437,168.32	1,854,859.84	29.06%
	3,803,281.30	5,166,244.05	35.84%

This result is outpaced the S&P 500 return for 2024 (23.95%).

2024 Internal Audit

The Internal Audit Committee of the OCA met in person at the Chancery office in Springfield, VA on Feb. 6-7, 2025 to conduct the annual internal audit. The Committee will present their report to the full Metropolitan Council, under separate cover.

Respectfully Submitted,



Andrew Smith, Treasurer



ORTHODOX CHURCH in AMERICA

Treasurer's Report

December 31, 2024

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

Greetings in Christ!

What follows is a set of internal financial statements that has been compiled with preliminary financial data through the fourth quarter of fiscal year 2024.

Included in this Treasurer's Report for the period ended Dec. 31, 2024 are the following:

- * Statement of Operating Activity - Unrestricted
- * Statement of Operating Activity - Restricted
- * Comparative Balance Sheet for December 31, 2024 and December 31, 2023

December 31, 2024 represents all four quarters of the OCA's fiscal year, so the target for operating revenues and its expenses is 100%.

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect additional adjustments with year-end closing.

Revenues

Revenue collection was \$2,593K including 75% of our full annual endowment draw and use of restricted funds for 2024, on an annual budget of \$2,462K (105.28%). Diocesan contributions were at 103.29% of budget. Individual/business contributions exceeded budget largely due to a number of unanticipated large gifts (several of which were end-of-life).

Expenses

Expenses incurred through Q4 2024 were \$2,444K on an annual budget of \$2,462K (99.26%).

Net Income

Unrestricted net income is \$148K through Q4 2024. This includes all of the anticipated endowment and restricted fund draw, but it does not incorporate any of the budgeted release from operating reserves.

If you have any questions about this report, please don't hesitate to contact me at asmith@oca.org.

In Christ,

Andrew D. Smith
Treasurer

ORTHODOX CHURCH IN AMERICA
Statement of Operating Activity - FY2024 - **Preliminary & Unaudited**
December 31, 2024

					Target 100.00%
Unrestricted		B	C	D	E
A	B	C	D	E	E
	CURRENT QUARTER	2024 YTD ACTUAL	2024 BUDGET		% BUDGET USED
1	REVENUE				
2	Diocesan Contributions	440,661	1,875,902	1,816,182	103.29%
3	Individual/Business Contributions	303,756	443,568	145,000	305.91%
4	Service Fees	4,645	33,730	50,000	67.46%
5	Interest Income/Realized Gains/Losses	14,914	36,961	50,000	73.92%
6	Appeals	-	250	-	
7	Special Events	-	-	-	
8	Other	905	49,991	50,000	99.98%
9	Release from Restriction - Endowed	-	87,133	75,000	116.18%
10	Release from Restriction - Restricted	-	65,035	104,000	62.53%
11	Use of Unrestricted Reserve	-	-	172,300	0.00%
12	TOTAL REVENUE	764,881	2,592,571	2,462,482	105.28%
13					
14					
15					
16	EXPENSES				
17	Administration	228,287	939,124	815,791	115.12%
18	Executive	147,142	596,036	623,757	95.56%
19	Archives	26,870	107,860	107,829	100.03%
20	External Affairs	17,116	43,225	33,187	130.25%
21	Chapel	458	1,347	-	
22	Property	63,735	131,361	127,300	103.19%
23	TOC/Comm	8,276	26,996	36,300	74.37%
24	Holy Synod	33,853	66,877	68,400	97.77%
25	Metropolitan's Office	16,991	96,630	102,147	94.60%
26	Metropolitan Council	22,452	29,047	32,450	89.51%
27	St. Catherine's	16,773	67,339	67,658	99.53%
28	SOCA	-	-	-	
29	BOT	-	-	-	
30	Mission Planting Grants	26,000	104,000	104,000	100.00%
31	Ordination Candidacy	4,000	5,000	6,000	83.33%
32	Canons & Statutes	-	-	-	
33	ORSMA	2,179	4,373	46,668	9.37%
34	Continuing Ed	-	-	-	
35	Seminaries	18,000	18,000	18,000	100.00%
36	Departments	40,769	126,909	117,245	108.24%
37	Office of Pastoral Life, net	12,690	80,072	155,750	51.41%
38	TOTAL EXPENSES	685,593	2,444,196	2,462,482	99.26%
39					
40	REVENUE OVER/(UNDER) EXPENSES	79,289	148,374	(0)	

ORTHODOX CHURCH IN AMERICA
Statement of Operating Activity - FY2024 - Preliminary & Unaudited
December 31, 2024

<i>Restricted & Designated Activity</i>	A	B	C	D	E	F	G	H	I
	Archives (3 funds)	Office of Pastoral Life	All-American Council	Mission Planting	Lilly TiM	Lilly ECFPL	Total Restr. Funds	Endowment Activity	Total Restricted
1 REVENUE									
2 Diocesan Contributions		76,774					76,774		76,774
3 Individual/Business Contributions		19,930		81,300		1,250,000	1,351,230	189,802	1,541,032
4 Legacies and Bequests	50,000						50,000	82,067	132,067
5 Dividends, Interest							-	101	101
6 Other Investment Revenue (Realized)							-	-	-
7 Service Fees							-	-	-
8 Vendor							-	-	-
9 Observer							-	-	-
10 Ads							-	-	-
11 Banquet							-	-	-
12 Interest Income/Realized Gains/Losses							-	99,323	99,323
13 Appeals							-	-	-
14 Special Events							-	-	-
15 Other (incl Grants)							-	-	-
16 TOTAL REVENUE	50,000	96,704	-	81,300	-	1,250,000	1,478,004	371,293	1,849,297
17									
18									
19									
20 EXPENSES									
21 6017 Pension Expense		3,200			2,250		5,450		5,450
22 6050 Distributions - Grants/Endowments					1,000		1,000	5,527	6,527
23 6095 Bank Fees							-		-
24 6100 Office Expense	6,150						6,150		6,150
25 6105 Food							-		-
26 6110 Flowers/Candles/Liturgical Items							-		-
27 6211 Accounting Fees							-		-
28 6214 Legal Fees						8,122	8,122		8,122
29 6215 Outside Contract Services		12,750	4,444		27,500	3,500	48,194		48,194
30 6217 Investment Advisory Fees							-	21,392	21,392
31 6251 Conference/Space Rental						28,951	28,951		28,951
32 6253 Program Supplies		330			1,878		2,208		2,208
33 6284 Equip Rental							-		-
34 6290 Repairs Expense							-		-
35 6501 Books, Subscriptions, Dues		(281)			495		214		214
36 6502 Postage		366			63		430		430
37 6503 Printing and Copying		303			197	334	834		834
38 6504 Supplies		424			619		1,043		1,043
39 6516 Misc Other		12			595		607		607
40 6650 Stipends		58,350	11,800		109,658	19,000	198,808		198,808
41 6671 Computer Software Expense		17			587	587	1,190		1,190
42 6733 Website							-		-
43 6831 Conference, Convention, Meeting					313	20,000	20,313		20,313
44 6832 Travel		2,273	1,765		18,515	9,582	32,135		32,135
45 6833 Lodging		1,602	111		19,162	353	21,228		21,228
46 6834 Meals		726	632		6,221	1,450	9,028		9,028
47 7500 Change in the Value of Unitrusts							-	(21,673)	(21,673)
48 Release to Unrestricted (est.)				65,035			65,035		65,035
49 TOTAL EXPENSES	6,150	76,872	18,752	65,035	189,053	91,878	450,939	5,246	456,186
50									
51 7060 Unrealized Gains/Losses							-	1,057,151	1,057,151
52									
53 REVENUE OVER/(UNDER) EXPENSES	43,850	19,833	(18,752)	16,265	(189,053)	1,158,122	1,027,065	1,423,198	2,450,263
	[A]				[B]	[C]		[D]	

NOTES

[A] Archives Digitization, Relocation, & General Funds are combined for presentation purposes.

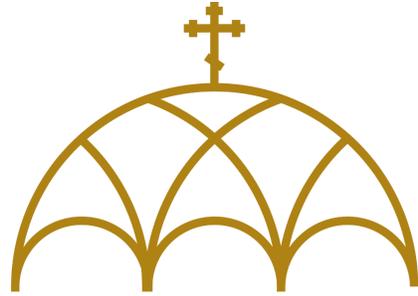
[B] The Lilly Grant (TiM) began the year with a balance from the prior year; this year's expenses are drawn from those reserves. This includes a \$500,000 grant received in 2023 to continue the Thriving in Ministry program for the next 5 years.

[C] In 2023, the OPL received a \$50,000 award from Lilly to plan to apply for a much larger grant to study economic challenges facing pastoral leaders (ECFPL). OPL was awarded the larger grant (\$1,250K) in 2024.

[D] Surplus in Endowment activity attributable primarily to unrealized investment performance. The OCA received an unrestricted stock gift of nearly \$150K in Q3 2024. While not purpose restricted, it is reflected here in Endowment activity.

ORTHODOX CHURCH IN AMERICA
Balance Sheet - FY2024 - **Preliminary & Unaudited**
December 31, 2024

A	B	C	D
	<u>12/31/2024</u>	<u>12/31/2023</u>	DIFFERENCE
1 ASSETS			
2 Cash & Cash Equivalents - Operating	2,497,897	1,036,240	1,461,657
3 Cash & Cash Equivalents - Restricted	545,372	925,196	(379,824)
4 Petty Cash	-	-	-
5			
6 Accounts Receivable	76,431	165,462	(89,031)
7 Grants Receivable	-	-	-
8 Prepaid Expense	85,925	-	85,925
9 Other Current Assets	25,406	8,930	16,476
10			
11 Fixed Assets, net of depreciation	137,366	263,085	(125,719)
12 Investments	5,166,244	3,857,848	1,308,396
13 Right of Use Asset - Office Space	51,587	103,805	(52,218)
14			
15 Total Assets	<u>8,586,227</u>	<u>6,360,566</u>	<u>2,225,661</u>
16			
17			
18 LIABILITIES			
19 Accounts Payable	129,017	80,671	48,346
20 Accrued Expenses	-	43,027	(43,027)
21 Retirement Obligation	-	-	-
22 Unitrust Liability	904	77,144	(76,240)
23 Payroll Liabilities	44	233	(190)
24 Other Liabilities	6,710	3,444	3,266
25			
26 Deferred Revenue	30,851	-	30,851
27			
28 ST Lease - Office Space	52,602	103,805	
29 LT Lease - Office Space	-	-	
30			
31 Total Liabilities	<u>220,128</u>	<u>308,324</u>	<u>(36,993)</u>
32			
33			
34 NET ASSETS	<u><u>8,366,099</u></u>	<u><u>6,052,242</u></u>	<u><u>2,313,858</u></u>



Office of Pastoral Life

— ORTHODOX CHURCH IN AMERICA —



Clergy Wives



FINANCIAL HEALTH INITIATIVE
for OCA Clergy Families



Thriving in Ministry



Synaxis



Office of Pastoral Life Spring 2025 Meeting

The Office of Pastoral Life has made significant strides in the past year, responding to the recent growth prompted, in large part, by the reception of two Lilly Endowment grants. This growth has allowed the Office to expand its initiatives and deepen its commitment to supporting clergy and clergy families across the Orthodox Church in America. In line with this momentum, I transitioned from my role as part-time Chair of the Office to full-time Director, stepping away from my parish ministry as of January 1. This transition was formally approved by the Metropolitan Council at the Fall 2024 meeting and affirmed by the Holy Synod during their Fall session. I am grateful for the support and encouragement of His Beatitude, Metropolitan Tikhon, whose guidance has been important in this new chapter for the Office. With these changes in place, the Office of Pastoral Life is well-positioned to further its mission and continue providing meaningful resources and support to the Church's pastoral leaders.

Key Initiatives and Progress

Customer Relationship Management (CRM) & Data Management (Salesforce)

The Office of Pastoral Life (OPL) is making steady progress in establishing a centralized database to better manage information related to clergy, clergy wives, donors, and program participants. We are actively engaged in planning to determine the most effective way to structure and manage data within the CRM to support the diverse needs of OPL programs.

Salesforce has been selected as our primary CRM platform and will integrate nicely with MailChimp to streamline our marketing and outreach efforts. The long-term vision is to enhance the OCA's data-tracking capabilities and improve clergy record management across the board.

Salesforce licensing for OPL has been finalized, and we've conducted multiple discovery phase meetings with Harborcoat, a third-party consulting firm specializing in CRM implementation and data management solutions, to refine the implementation process for the Financial Health Initiative (FHI). Additionally, process model documentation has been completed for both the FHI and Clergy Wives Ministry (CWM) programs and plans are to continue this exercise with the Thriving in Ministry Program (TiM) and Synaxis Program.

Marketing & Communications

The Office of Pastoral Life has transitioned from Email Octopus to MailChimp, using its advanced features for more effective email marketing and outreach across all programs. As needed, team members will undergo training to best use MailChimp and ensure clear, efficient communication. Website updates are actively in progress. Additionally, a targeted marketing campaign for TiM is currently in development to enhance program visibility and engagement. Efforts are also underway to ensure a positive presence at the All-American Council in 2025.

Financial Health Initiative (FHI)

The inaugural cohort of the FHI program - a Lilly Endowment-funded grant initiative - will include approximately 30 clergy with their spouses, and will launch on May 1. The program is set to run from June 1 to August 31. Participants, chosen by Diocesan Bishops and Chancellors, will experience the program firsthand and offer feedback for future improvements. After successful completion of the program, these clergy families will be eligible to apply for the FHI Fund (up to \$5,000 in debt relief, or \$5,000 for retirement savings). Ramsey SmartDollar has been selected as the official financial education

platform for FHI. A key challenge ahead is securing matching funds for the FHI Fund to enable grants for debt relief, retirement planning, and Clergy Children Scholarships (set to launch in 2026).

Thriving in Ministry (TiM)

Now in the second year of its sustainability phase, TiM, - another grant program supported by Lilly Endowment, Inc. - continues to grow, nearing the program's intended scale of 30 active groups. With steady momentum, we anticipate concluding 2025 with between 32 to 35 groups.

Following the receipt of a 2024 grant from the Hellenic Foundation of Chicago and securing an additional grant for 2025, current efforts are focused on establishing a strong pan-Orthodox TiM presence in the greater Chicago area. The annual Fall Facilitators Retreat was held at the Saint Iakovos Retreat Center, where new facilitators were trained, alongside continuing education for experienced facilitators. By summer 2025, we anticipate six active peer groups in the midwest.

We are pleased to announce the appointment of Shelby Giokas, MDiv, as the new TiM Program Director. Additionally, TiM is guided by a seven-member Board, which has welcomed three new members during this reporting period. The board also approved a part time administrative assistant for the program, Katie Syfrett.

As with our other grant-funded initiatives, a key challenge moving forward will be securing matching funds to sustain and expand the program's impact. Matching funding is a condition of the Lilly Endowment, Inc., Sustainability Grant.

Synaxis

The *Synaxis* program continues to offer valuable opportunities for OCA parish priests and deacons to come together for peer learning and fellowship. In December, a successful gathering was held with His Beatitude serving as the main presenter, sharing sensible, practical, and useful insights on fasting with our gathered clergy.

Plans are currently underway for the next *Synaxis* on March 11, featuring Father Sergius, the abbot of Saint Tikhon's Monastery, who will lead a discussion on clergy self-care and the prayer of the heart. A promotional campaign for this event was launched on February 11.

To support these efforts, Sugar Madrid-Pulgar, OPL Administrative Assistant, has been assigned to manage *Synaxis* logistics, ensuring smooth coordination of upcoming gatherings.

Clergy Wives Ministry (CWM)

To date, CWM has raised over \$20,000 for the reliquary of their patron, Blessed Matushka Olga. His Grace Bishop Alexei will update them on her glorification process in late February.

At the All-American Council, they plan to host an informal clergy wives' luncheon and be present at the OPL table to connect with clergy, clergy wives, and delegates. They've also prepared a proposal for a 2026 in-person retreat to present to the Holy Synod.

In 2025, they will continue offering quarterly retreats, beginning with Fr. Stephen Vernak on the Financial Health Initiative (FHI). During Lent, Fr. Steven Voytovich will lead a retreat on confession for clergy widows. They have made seminary visits to get acquainted with student wives, and their social media presence helps foster connection, encouragement, and support among the larger clergy wives community.

Securing an accessible yet private directory remains a challenge, and the all-volunteer team continues working to strengthen bonds among clergy wives in service to Christ and the Orthodox Church in America.

Technology

OPL continues to work on its technology and tool integration to better support the organizational needs. As mentioned above, the Salesforce licensing process has been finalized, and several discovery meetings with Harborcoat have helped refine its implementation. In an effort to streamline operations and reduce costs, OPL is transitioning to a single organizational Zoom account. Onboarding and offboarding processes are being enhanced to ensure that new hires have access to all necessary tools, email accounts, and HR resources.

Looking ahead, process documentation meetings will be scheduled to align workflows across teams. Brainstorming sessions are planned to explore how the FHI portal will integrate with Salesforce, and clarity is needed on how various other OPL programs can utilize Salesforce for greater efficiency. Donor lists will be gathered to populate the development database.

Respectfully submitted,

Archpriest Nicholas J. Solak
Director, Office of Pastoral Life

Report of the Departments

Orthodox Church in America

February 14, 2025

Below is a summary of the ongoing work or status of each department since the last report of September 29, 2024.

Website Refresh Project

Work and discussion continues to reorganize the files in the Department of Liturgical Music. The eventual subdomain (music.oca.org) will make using the complexity of finding texts and music more user-friendly.

Department of Liturgical Music and Translations

- ONGOING: Compilation of all available resources and texts that have been used in the past and present under the “Texts for Liturgical Services” section provided in the helpful, but labor-intensive, individual service sheets published on the OCA website. He will be compiling all current texts into a usable online Horologion, Triodion, Pentecostarion, Menaion, Psalter, and other possible resources that we currently possess.
- ONGOING: Expansion of Thee/Thou music for the Ochoechos and Menaion
- ONGOING: Creation of complete rubrical notes for upcoming Divine Services. The current focus is on the Saturday night/Sunday cycle, but plans include expanding to include other commonly served services for the Great and Vigil-ranked feasts.
- ONGOING: Posting of basic music for Matins and Vespers.
- ONGOING: Basic Sight-Singing and Ear-Training Course for choir directors and singers who may be unfamiliar with basic musical concepts. (*This is the fourth round for this popular program.*)
- ONGOING: Basic Musicianship and Conducting courses continue to be offered.
- NEW: New musical settings for various feasts have been posted.
- NEW: Discussions are being held regarding plans to expand the offerings for rubrics and liturgical order of services for all major and minor services and feasts. Currently, the order of services is offered for the Saturday evening Vigil service for every weekend of the year.
- ONGOING: The DLM meets regularly to discuss projects, plans, and roadblocks to continuing improvement.
- ONGOING: New settings of hymns set to *podoben*/special melodies

Department of Evangelization

- With the approval of the Holy Synod and Metropolitan Council, awarding of a new first year grant for the Mission Planting Grant program was paused to consider revisions to the program to encourage more participation, as well as other possible ways to support mission and outreach programs. A meeting report with recommendations will be submitted separately.
- New series of free printable pamphlets posted, “The Bishops Speak,” taken from prior encyclicals and statements.

Department of Youth, Young Adult, and Campus Ministry

- A meeting with Bishop Andrei and stakeholders of youth ministry to consider possible candidates for a part time YYAC director.

Department of Christian Education

- POSTED: More lessons towards a 32-week new Church School curriculum. (see below)
- ONGOING DEVELOPMENT: A comprehensive 32-week Church School curriculum to be written at five different levels. The subjects will parallel the subjects presented in the Inter-Departmental document “Essential Orthodox Christian Beliefs: A Manual for Adult Instruction.”

Department of Christian Service and Humanitarian Aid

- Need for re-visioning of departmental work.

Inter-Departmental “Essential Orthodox Christian Beliefs: A Manual for Adult Instruction”

- POSTED: Third update of EOCB, including formation activities
- POSTED: PowerPoint Slides for teaching of EOCB
- POSTED: Review questions for each of the 16 chapters

Archpriest Thomas Soroka
Project Manager

February 14, 2025

Your Beatitude and esteemed members of Metropolitan Council,

Most blessed master, bless!

The communications of the Orthodox Church in America continues to maintain a steady stream of daily content across Facebook, X (Twitter), Instagram, and Telegram. This includes news items, scripture readings, liturgical text updates, and other regular content

In the past three months we saw the following changes in our metrics:

Facebook: Engagements: 15K | Followers: 43.6K | Average new followers per day: 2.
X (Twitter): Engagements: 5K | Followers: 29.7K | Average new followers per day: 11.
Instagram: Engagements: 15K | Followers: 12.6K | Average new followers per day: 8.
Telegram: Subscribers: 1.2K.

The most popular posts include the post congratulating Your Beatitude and members of the Holy Synod on birthdays, Name's Days, and enthronement anniversaries. Others include Your Beatitude's participation in the 2025 March for Life, the recent archpastoral visit to Mexico, and celebration of the Feast of the Three Hierarchs at St. Vladimir's Seminary. We average 2 social media posts per day.

In the last three months, oca.org had the following metrics:

Users: 458k, Sessions: 1.1M, Average length of time: 4m 10s. There were 3.2M unique page views, with the most popular sections remaining the Scripture readings, Lives of the Saints, catechetical material, liturgical downloads, and common Orthodox prayers.

The In Memoriams have had high traffic on the website, especially those for Mka. Marie Meyendorff, Mka. Eugenia Nehrebecki, and Mka. Susanne Senyo.

The canonization of Mka. Olga continues to be received with excitement and interest, particularly the announcement in December regarding the services surrounding her upcoming glorification and the story in November about the uncovering of her relics. Other pages of note include the announcement of the retirement of His Eminence Archbishop Benjamin, and Your Beatitude's attendance at the funeral of President Jimmy Carter.

With the All-American Council approaching, the collection of responses to Your Beatitude's Call to Reflection is almost complete, with the deadline coming on February 18. Shortly after the deadline, the committee will meet and begin the analysis of the responses to find common themes and areas of insight. The goal is to produce a white paper which can then be brought to the All-American Council.

A dedicated page for the All-American Council has been set up (oca.org/aac) and continues to be updated regularly with new information as it becomes available. As we approach the Council, this page will serve as a central hub for announcements, schedules, and resources.

Since the initial conversations with the website developer, Ms. Deb Colitas, she has been working on the update and redesign to oca.org. She has been reaching out to various stakeholder groups – OCA leadership, clergy, and laity – to understand how the website is utilized by different groups of visitors. Some commonalities which are emerging are not a surprise, such as a frustration with the many subpages and too much information. Other responses are important to the future design. For instance, all the stakeholders have indicated they follow the news at oca.org, but not regularly. About once a week they will catch up on all the news in one sitting. Ms. Colitas is hopeful that she will be able to report back by early March.

Thank you for your continued support in our work.

Yours in Christ,

Priest Kyle Parrott



Metropolitan Council

As of January 26, 2025

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