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# METROPOLITAN COUNCIL of the ORTHODOX CHURCH IN AMERICA

REPORTS  
2023 Spring Session

Tuesday, March 14, 2023  
Thursday, March 16, 2023  
Conducted by video conference



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**TENTATIVE SCHEDULE and AGENDA ITEMS  
REGULAR SPRING SESSION OF THE METROPOLITAN COUNCIL  
March 14 & 16, 2023**

TO BE HELD VIA TELECONFERENCE

**Tentative Agenda – Tuesday, March 14, 2023, 1:00-4:00 pm EST**

1. Opening Prayer
2. Call to Order – Archpriest Alexander Rentel
3. Review of Agenda – Archpriest Alexander Rentel
4. Roll Call– Archpriest Alexander Rentel
5. Approval of the Minutes of the Regular Fall 2022 Session and the Special 2023 Session of the Metropolitan Council
6. Report of the Metropolitan – His Beatitude Metropolitan Tikhon
7. Report of the Chancellor – Archpriest Alexander Rentel
8. Property Committee – Ray Steeb and Gregory Honshul
9. Legal Report – Judge Lanier and David Lane
10. Report of the Secretary – Priest Alessandro Margheritino
11. Preconciliar Commission for 21<sup>st</sup> AAC – Priest Alessandro Margheritino
12. Report of the Treasurer and Amended 2023 Budget – Mr. Andrew Smith
13. Internal Audit – Matushka Sharon Hubiak
14. Concluding Remarks – His Beatitude
15. Prayer – His Beatitude

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1. Opening Prayer
2. Call to Order – Archpriest Alexander Rentel
3. Review of Agenda – Archpriest Alexander Rentel
4. Roll Call– Archpriest Alexander Rentel
5. Pension Board – Archpriest John Dresko and Michael Stieglitz
6. Pension Committee – Archpriest Joseph Ciarciaglino
7. Special Pension Joint Committee – His Eminence Archbishop Daniel
8. Concluding Remarks – His Beatitude
9. Prayer – His Beatitude

# Spring 2023 Metropolitan Council

Via Zoom

March 14 and 16, 2023

## Report of the Metropolitan

Tuesday, March 14, 2023

1. *Welcome.* Welcome to the regular Spring meeting of the Metropolitan Council which we are holding electronically. I know that all of us appreciated the opportunity to meet in person last Fall and I look forward to this year's Autumn meeting which we are planning as a hybrid session with the usual in person meetings and an additional zoom meeting.
2. *Introductions.* Although I mentioned the new diocesan Metropolitan Council representatives at the special meeting we held on February 3, I would here like to welcome them again more formally to our regular meeting. We welcome and look forward to the contributions to this body of the following:
  - a. Archpriest David Garretson (Diocese of New York and New Jersey)
  - b. Mr. Mitch Van Duyn (Diocese of New York and New Jersey)
  - c. Archpriest Maxim Isaac (Diocese of Alaska)
  - d. Mr. Anthony Lekanoff (Diocese of Alaska)
  - e. Archpriest Patrick Burns (Diocese of New England)
3. *Travel and Activities.* In February, I reported on my activities since the autumn meeting of the Metropolitan Council so I will not repeat those here but will focus on the events of the past month.
  - a. For the Sunday of the Publican and the Pharisee, I was at Saint Matthew's Church in Columbia. At that liturgy, I ordained Michael Day, a graduate of St. Tikhon's Seminary from about 20 years ago, to the holy diaconate. Saint Matthew's is about a 40 minute drive from my residence in Falls Church.
  - b. Later that week, I travelled to Lexington, Kentucky where the annual Pastoral Conference for the Diocese of the South was held. I was invited by His Eminence Archbishop Alexander to offer a presentation which was

entitled: *Spiritual Practices for Priestly Health*. We were graciously hosted by Archpriest Justin Patterson, a member of the Metropolitan Council, and the community of Saint Athanasius Orthodox Church where the divine services were held. It was a blessing to be able to gather with around 80 clergy from the Diocese of the South and to concelebrate with His Eminence Archbishop Alexander and His Grace Bishop Gerasim at the Divine Liturgy. It is encouraging for me to visit parishes like Saint Athanasius where there is a palpable sense of enthusiasm for the life of the Church.

- c. *Memory Eternal*. Immediately after the conference, I flew to Columbus, Ohio, to preside at the funeral services for Archpriest Daniel Rentel who fell asleep in the Lord on February 7. In addition to being the biological father of our Chancellor, Fr. Alexander, Father Daniel offered his priestly ministry within the Orthodox Church in America for over 60 years. He served in the Dioceses of Western and Eastern Pennsylvania until 1976, when he founded Christ the Savior Orthodox Mission in Cincinnati and later established a missionary outreach at Ohio State University in 1982. That mission, which I visited early on in my journey in Orthodoxy, evolved into Saint Gregory of Nyssa Church, where the funeral services were held and a large group of clergy and faithful gathered. We offer our prayers and condolences to Matushka Elaine and her entire family, especially Father Alexander. May Fr. Daniel's memory be eternal and may all of us strive for his level of faith and integrity as a priest of the most high God.
- d. On the Sunday of the Prodigal Son, I concelebrated the divine liturgy with His Eminence Archbishop Melchisedek at Saint Catherine's Church in Hagerstown, Maryland, during which we honored the rector, Archpriest Dennis Buck on his 40<sup>th</sup> anniversary of priestly ordination. In particular, it was an occasion for Archbishop Melchisedek to honor Fr. Dennis who is his godfather in the faith. Saint Catherine's is a little over an hour from my residence.
- e. On the Sunday of the Last Judgement, I travelled 23 minute to my primatial see, Saint Nicholas Cathedral, for a hierarchical divine liturgy, following which I presided at the annual meeting. The previous day, I presided at the

Archdiocesan Council meeting which was held via zoom and later that week, I likewise presided at the Council meeting for the Diocese of New England, for which I continue to serve as locum tenens.

- f. For the entirety of the First Week of Great Lent, I was in residence at Saint Tikhon's Monastery, where I was able to benefit from the very full cycle of services in which not only the monastics participate, but also all the seminarians, for whom classes are suspended that week. This also gave me the opportunity to meet with the Abbot of the Monastery, Archimandrite Sergius, and the Dean of the Seminary Archpriest John Parker. I also held meetings with some of the stavropegial clergy attached to the Monastery. However, the bulk of the week was spent in Church for the services. Each day begins with the midnight office at 6:00 am, followed by Matins and the reading of the three appointed kathismata, and the first hour, which concludes around 8:30 am. After a one hour break, services resume at 9:30 am with the reading of the 3<sup>rd</sup>, 6<sup>th</sup>, and 9<sup>th</sup> hours with their appointed kathisma and then the typical psalms and Vespers with the 18<sup>th</sup> kathisma. The morning cycle concludes around noon with the serving of a short memorial service on Monday, Tuesday, and Thursday, for which I read through the list of names contained in commemorative dyptichs of the departed of the Orthodox Church in America. On Wednesday and Friday mornings, the liturgy of the presanctified gifts replaces daily Vespers and on the first four evenings, Great Compline is served during which I read the Great Canon.
- g. For the Sunday of Orthodoxy, I travelled to Berlin, Maryland to Christ the Savior parish. There I attended Vespers, presided at the liturgy, following which I blessed the new mosaics that were created for the entrance archway that was recently erected. I also had the opportunity to visit with Matushka Dunia Hubiak. At a distance of two and a half hours from my residence, Christ the Savior is the furthest of the parishes of the Archdiocese of Washington for me to travel to, though still less than the 5-6 hours it would take from Long Island.

- h. Finally, last Sunday, I served at Saint John the Theologian Mission Station in Fairfax Station, which is being served by one of our retired clergy, Archpriest Joseph Woodill and administered by our Archdiocesan clergy representative on the Metropolitan Council, Deacon Matthew Prentice. The mission station is 20 minutes from my residence.
4. As you can see, my weekend pastoral visitations have been made primarily to the parishes and missions within the geographic territory of the Archdiocese of Washington. I mention this simply to highlight once again the great benefit that I derive from the relocation in terms of my ability to engage, not only in archpastoral visitations, but the broader pastoral work of the Church. In addition to formal visits to the parishes, I have also been able to informally attend services and immerse myself more directly in the life of my communities. I find this very encouraging also for my work as the Metropolitan. While I am grateful that I am no longer living in the chancery office space, as I was at Westwood, the distance from my home to the new and temporary chancery office in Springfield is only 15 minutes. This is not only ideal for me personally, but also allows for increased activity at the chancery and a broader pool of potential assistance to the office and collaboration with the Archdiocese.
5. One slight drawback is that Father Alexander, as understood from the beginning of the relocation process, remains in New York. However, it is anticipated that he will relocate here at some point in the coming year, a move that is also dependent, at least in part, on the timeline for the sale of Westwood. Nevertheless, Father Alexander has been consistent and faithful in fulfilling his responsibilities as Chancellor and he and I speak or otherwise communicate on a daily basis on the wide range of matters that come before my office. Father Alexander has also travelled here for a few days each month, and is in fact here this week (as you can see).
6. Father Alessandro and Fr. John Mikitish are the other two full-time personnel that work out of the office on a daily basis. As Father Alessandro notes in his report to the Metropolitan Council, it is beneficial for the chancery officers and staff to be connected to the authentic life of parishes so that their world does not become limited by the administrative tasks that form the bulk of their work. In addition to

his multifaceted labors as Secretary, I have also assigned Father Alessandro as the priest for All Saints of North America mission (which is 10 minutes from the office and 20 minutes from my residence). This has proven to be beneficial for both the Chancery office and the life of the Archdiocese of Washington, though admittedly giving Fr. Alessandro more work to accomplish. However, I remain grateful for his energetic dedication to every aspect of his responsibilities. Father John also has proven highly useful both for the administrative functioning of the office and as my correspondence secretary. It is particularly helpful to have Fr. John in residence to help me craft my various homilies, remarks, and presentations, something that is more challenging remotely. We, of course, also rely very much on the database skills of his wife, Matushka Brenda. Both of them are coming up on significant milestones as Brenda is expecting their second child and Fr John is completing his doctorate. I will also add my gratitude to our Treasurer, Andrew Smith, from whom we will hear later, and to Susan Wisnewski and Alex Liberovsky, who continue to work at the Westwood property during this period of transition.

7. In the meantime, we are trying to develop and recruit talent that is local here in the greater Washington area for service to the Central Administration. One example is Alex Woodill, a parishioner at All Saints in Alexandria, who has been hired as a part time office assistant who comes in to the office once about once a week. This has proven helpful not only for me, since he takes care of my organizing my vestments and packing for my various trips, but also for Fr. Alessandro. In addition, I have also gathered a few others, notably Victor Lutes from Saint Mark's in Bethesda and Larry Basalyga from Saint Nicholas Cathedral, who, along with Alex, serve as my team of subdeacons, travelling with me as I make pastoral visits throughout the Archdiocese. It is my hope to expand this by scheduling some training sessions for deacons, subdeacons, and choir directors, which is in the planning stages for this coming summer.
8. Speaking of choir directors, last year, I gave a blessing to Juliana Woodill to create an Archdiocesan Choir, which she accomplished very quickly. The choir has already grown to about 35 singers from throughout the region here (including those from other jurisdictions) and they have already given two well-attended concerts and offered the responses at the liturgy recently held in honor of my 10<sup>th</sup>



anniversary. For the coming year, we have already planned a diocesan Bright Saturday Liturgy and a Vigil for the feast of Saints Peter and Paul, for which the choir will sing.

9. I mention all of this local activity to underline what to me is the great blessing of having relocated to geographical territory of the Archdiocese of Washington. Although I miss some aspects of living at the Westwood property, particularly the property itself, almost all the other inconveniences and challenges that came from having the chancery on Long Island have been overcome by our relocation here. I am hopeful that the remaining parts of the process can happen in a timely manner, and here we will receive some updates from Greg and Ray from our Property Committee later in this meeting.
10. *Pension*: Another important topic we will discuss at this Spring Session of the Metropolitan Council is the Pension Plan. We have devoted most of our Thursday session to hearing reports from the various Boards and Committees so I will reserve my fuller comments to then. However, I did want to report to the Metropolitan Council that, at the Autumn meeting of the Holy Synod, a Joint Committee was appointed which consists of membership from all the principal entities: the Holy Synod, the Metropolitan Council, and the Pension Board. As I will emphasize again on Thursday, the pension issues that we are wrestling with require the collaboration of the entire Church. Everything is on the table and all of us must work together to find the solutions that will be acceptable to all and beneficial to our clergy.
11. *External Relations*. In terms of our external relations, my office and I continue to monitor activities and happenings throughout the Orthodox world.
  - a. *Antioch*. The Holy Synod of the Church of Antioch has elected a new Metropolitan for the Antiochian Orthodox Archdiocese of North America, His Eminence Metropolitan Saba. I sent a letter of congratulation to His Eminence and he has responded with an expression of his gratitude and a desire to meet with me. We hope to arrange such a meeting as soon as possible.
  - b. *Albania*. I was in phone communication with Archbishop Anastasios of Albania concerning a clergy matter.

- c. I welcomed the new Chancellor of the Patriarchal parishes in the USA Fr Igor Vyzhanov, to the new and temporary chancery offices.
- d. *Ukraine*. The political and ecclesiastical situation in Ukraine continues to be fractured. The ecclesiastical conflicts continue to be reflected in our local context although I have heard reports from a number of quarters within the United States of some well-represented and well-attended events for the Sunday of Orthodoxy. With respect to Ukraine, the Holy Synod of the Orthodox Church in America maintains its objection to the unjust invasion of Ukraine by the Russian Federation. I reiterate that position here again. In our parishes and institutions we continue to pray for peace and for a cessation of the hostilities. Those hostilities are all the more painful because they involve Orthodox brothers killing each other. Even if this were not the case, war and fratricide, though they may be a reality of our fallen world, will always bring more division and destruction. It is good to reflect on this during our Lenten journey to Holy Pascha. Here, the words of Saint Nicholai Velimirovich from his paschal homily may be useful:
- e. “Christ’s victory is the only victory in which all humanity can rejoice, from the first-created to the last. Every other victory on earth has divided, and still divides, men from one another. When an earthly king gains the victory over another king, one of them rejoices and the other laments. When a man is victorious over his neighbour, there is singing under one roof and weeping under the other. There is no joyful victory on earth that is not poisoned by malice: the ordinary, earthly victor rejoices both in his laughter and in the tears of his conquered enemy. He does not even notice how evil cuts through joy.” (Homily on Pascha)
- f. In that spirit, I would say that no Orthodox Christian can encourage, support, or in any way make a worthwhile pronouncement on any war, including the present conflict in Ukraine. To do so would border on blasphemy because it would be founded on the principle of division and not on the unity provided by God. As Saint Nicholai concludes: “Even the most exalted human history is like some sun, the rays of which are half bright, half dark. Christ’s victory alone it like a sun that sheds bright rays on all that

are beneath it. Christ's victory alone fill all the souls of men with invincible joy. It alone is without malice or evil."

12. *Conclusion.* In conclusion, I offer my deep thanks to the Chancery Officers staff for their hard work and to all the members of the Metropolitan Council for their contributions to the on-going life of the Church.

Thursday, March 16, 2023

1. *Pension:* As I mentioned on Tuesday, one of the most important topics we are discussing at this Spring Session of the Metropolitan Council is the Pension Plan. I also informed the Metropolitan Council that, at the Autumn meeting of the Holy Synod, a Joint Committee was appointed with membership from all the principals involved in the pension discussions: the Holy Synod, the Metropolitan Council, and the Pension Board. We will be hearing today from the Special Pension Joint Committee, the Pension Committee of the Metropolitan Council, and the Pension Board.
2. As I said on Tuesday, the pension issues that we are wrestling with affect the entire Church: our bishops, our clergy, and our parishes. We are dealing with highly complex matters that, at the same time, hold a value in the millions of dollars. None of us should take these matters lightly and all of us need to work together to find common solutions and resolutions that will be acceptable to the Church.
3. I am keenly aware of the tensions that have surrounded these discussions. They are not new: we have seen those tensions erupt in various ways over the past two years and it is clear to me that they are continuing to erupt here and there. I mention this only to emphasize the following points as we prepare to hear the various reports and engage in the subsequent discussions:
  - a. First, as the Primate, I will not be satisfied until a solution is arrived at that is acceptable to all: the Holy Synod, the Metropolitan Council, and the Pension Board. The unity of our church, the reassurance of our clergy and lay employees, and the trust of our parishes depend on this effort to arrive at a common resolution. In other words, we are all seeking answers to the same questions and should never be drawn into polemic.

- b. This should not be difficult to achieve since, and this is my second point, we know that these questions, at their core, are mathematical. I do not discount that there are broader questions of principle and interpretation but ultimately we need clarity on the actuarial questions so that the proper fiduciary approach can be taken by all the relevant bodies.
  - c. My third point is precisely that we must be mindful of the bodies that each of us represents. I cannot have individuals within any of the affected bodies driving the process or acting unilaterally. Here I include bishops, members of the Metropolitan Council, and members of the Pension Board. Let me add here that this also makes it incumbent on all of us not to perceive that others are driving the process or acting unilaterally. I am not accusing any individual of either driving the process or of having mistaken perceptions about others. All I am doing is noting our human tendency to give in to either one of these temptations and asking that we strive to avoid them. This is why it was my desire to have a joint committee work on these issues in the first place.
  - d. As my final point, it seems to me that one of the chief sources of tension in these discussions is the question of transparency. I would ask that we all remember that transparency means the ability to ask questions without the other party feeling threatened or taking the question personally. We should all strive to arrive at the truth by following the Gospel commandments.
4. Finally, I would like to offer my gratitude to His Eminence Archbishop Daniel, the chair of the Synodal Joint Committee, to Archpriest Joseph Ciarciaglino, the chair of the Metropolitan Council Pension Committee, and to Matushka Mary Buletza-Breton, the chair of the Pension Board for their work on these highly complex issues. We will hear from all three committees today and I look forward to hearing their reports and the subsequent discussions.

# **Orthodox Church in America**

## **Metropolitan Council**

### **Spring Meeting 2023**

#### **Property Committee Report**

**Most Blessed Master, Bless!**

**Your Beatitude, Reverend Fathers and Esteemed Metropolitan Council**

We last presented to you at our Fall 2022 Meeting of the Metropolitan Council held at our new temporary Chancery located in Springfield, VA. At that time, we presented data, including recent sales comparable for Oyster Bay Village, in support of our recommendation for a listing price reduction. Our strategy employed our new price reduction as a catalyst to promote further discussions with key prospects, with hopes of leading to a sales agreement.

Unfortunately, our discussions failed to close the gap on our pricing differences and in addition, we believe economic pressures, with rising interest rates and recession fears contributed to a general lack of interest at that time.

#### **Next Steps for 2023**

We have since identified and engaged Mark Kaplan, with Ripco Realty, to re-list Westwood and represent the Orthodox Church in America, in the sale of the property. We have recently met with Mark and his team to kick-off our 2023 sales efforts and his team is busy viewing the property and preparing marketing materials.

These new efforts will target commercial (developer) prospects known to Mark and to whom he believes Westwood would be a good project match. Mark has emphasized to us repeatedly; his goal is to identify that prospect who will offer the best price with the highest probability to transact. Our target prospect is predicted to have a commercial interest in the property, but our sale efforts will not exclude those seeking a residential use purchase. A reasonable expectation for closure, given this sales plan, is reported to be 9 to 18 months.

#### **Parallel Activity**

Concurrent with these efforts, we are working with Ripco to identify a consultant with expertise in Oyster Bay Village, regarding property appraisal and the associated tax grievance process. As recommended by Ripco, our Central Church Controller, have taken the necessary initial step of filing a tax grievance before the March 1<sup>st</sup>, 2023, deadline. Please note, this type of appraisal seeks to support our tax grievance efforts and differs from a purely “market evaluation” of the property. We are expecting the expense for this type of appraisal service to range from \$5,000 to \$8,000, in total. Be aware, we may also incur a fee for professional services engaged to formally dispute our tax assessment and any resulting successful tax assessment reduction. We will report back as we learn more details about this process and our need to engage a consultant.

The Property Committee remains committed to finding a buyer for the timely sale of Westwood, at the best market return and contractual terms. We firmly believe Mark Kaplan and Ripco Realty to be the best available choice to represent the Orthodox Church in America in this matter. Westwood is a good fit for Ripco and the real estate market they serve, and ideally, they possess an excellent knowledge of the local marketplace, including awareness of issues inherent to Oyster Bay Village. We remain confident in their strategy plan to bring us a buyer in 2023 and look forward to working together.

Yours in Christ,

Ray Steeb & Gregory Honshul

Co-Chairpersons Property committee

**Report of the Secretary of the Orthodox Church in America**  
**Regular 2023 Spring Session of the Metropolitan Council**  
**March 14 & 16, 2023**

**OVERVIEW.** The relocation of the Chancery began last June when His Beatitude Metropolitan Tikhon and I relocated to Northern Virginia. Following the All-American Council, we began working at the new and temporary Chancery office in Springfield, VA. I am happy to report that the transition continues to go well, and we anxiously look forward to its completion in the near future.

On a personal level, part of the transition meant a return to pastoral ministry at a small parish in the Archdiocese of Washington, All Saints of America. I am grateful to His Beatitude for giving me the opportunity to serve this wonderful community. As I mentioned in my report to the All-American Council, having the staff serving in local parishes is part of the reason why the Chancery relocated. The Chancery staff does not and should not operate in a merely bureaucratic mode; rather, work in the administration should presuppose immersion in the life of the Church.

While my travel is generally reduced now, since the beginning of 2023, I have nevertheless traveled with His Beatitude to Rome to attend the funeral of Pope Emeritus Benedict XVI, to Mexico for His Beatitude's annual pastoral visit to the Diocese, and to Ohio for the funeral of Archpriest Daniel Rentel. I have also traveled to Syosset and Yonkers for short trips. At the end of March, I will travel to St. Tikhon's Seminary to offer a class, as I did last year, on the prevention of sexual misconduct.

Below I want to highlight several areas that fall, to a large extent, under the purview of the Office of the Secretary. With that said, while I can list a number of activities and projects, it is hard to properly convey in a report the intense and multifaceted work that is done in our office.

**PHYSICAL OFFICE MANAGEMENT.**

Since the beginning of Fall 2022, the Chancery of the Orthodox Church in America has effectively held operations in two distinct facilities in Syosset, NY, and in Springfield, VA.

The operations at Westwood currently involve the Archives—getting ready to be moved to SVOTS—and part of the finance department. The Chancellor also works from his physical office when he is not traveling or in the VA office.

The building's needs remain numerous, but for now, we are able to keep them at a minimum. Cleaning services are performed every two weeks, a couple of trees obstructing the driveway came down during a recent storm and were cleared, but we are happy to report no water damage or infiltration in the basement. Unless the property sells before then, in late spring some landscaping work will need to be performed. The driveway is also showing more and more signs of decay.

In the last few months, I have traveled to Westwood to bring down more necessary files, icons, various items, and liturgical supplies that are needed for a fully operational office. On my last trip, sacred items such as relics and chrisms were also brought down to VA. To a large extent, the office in Virginia now has everything needed for the Chancery to be fully operational here.

The office space is maintained clean and well organized with efforts to avoid collecting unnecessary items which can easily cause a very cluttered space. It goes without saying that this was the problem at Westwood for many years.

His Beatitude Metropolitan Tikhon has already received a number of guests at the VA Chancery, usually receiving them in the welcoming/synod room where the relics and past primates' portraits are placed. Part of this room is also organized as a chapel.

**INFORMATION TECHNOLOGY.** The various technology updates implemented over the last couple of years continue to serve the Chancery staff and its work well. We are expanding the use of BOX, the system we use as our virtual server, and we are now asking more of our offices and departments to move their data to the same platform.

Last summer we adopted Airtable as our new database which is proving very effective. We are able to collect and store additional information on this database very easily and produce reports quickly.

At the direction of Fr. Alexander, I have begun working with Priest Joel Wilson of Rolla Creative on a dedicated clergy ordination portal. On this portal, candidates for ordination and clergy transferring into the Orthodox Church in America will be able to upload the necessary documents and track their progress. We anticipate launching this portal this summer.

Both Fr. John Schroedel, Tech Manager, and I have met with Deacon Matthew Prentice, Chair of the Tech Committee, who is working on an audit of our technology needs and usage.

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

The current members of SMPAC are Archpriest Alexander Rentel, Chancellor; Priest Alessandro Margheritino, Secretary; Mr. Bernard Wilson, ORSMA Coordinator; Archpriest David Mezynski; Archpriest Justin Patterson; Protodeacon Peter Danilchick; and Mr. Robert Koory, Esq.

Toward the end of last year, SMPAC decided to begin holding regular monthly meetings, each of which is focused on a specific topic. The meetings are held via teleconference, typically on the second Thursday of the month. At the recent meetings, we have discussed and reviewed the PSP compliance section in the Annual Diocesan Reports, the roles of SMPAC and ORSMA, and the Clergy-In-Crisis



Protocol. We have just revised the Registered Sex Offender Agreement, which has been posted on the website.

We are also updating a number of forms on our website and have slightly reorganized the dedicated page on the Prevention on Sexual Misconduct.

**COMMUNICATION.** Fr. Kyle Parrott, Director of Communication, highlights the progress with the social media platforms and the website in his own report. After much consideration, we decided to begin updating the structure and organization of our website before venturing into a redesign. While we can do the organization ourselves, the design portion will require us to hire an outside firm which would require some budgetary discussion with the Treasurer and the Finance and Investment Committee.

While it is mostly not immediately visible, there is constant work happening to update our website, directory, information, forms, and articles. I am grateful for the work of our team.

**OPERATIONS.** There are a number of other important tasks under the purview of the Office of the Secretary in which I am involved on an ongoing basis. I continue to maintain the 501C3 master list and work with a number of parishes on their tax-exempt status. I also continue to draft and maintain the Chancery Monthly Digest that is distributed every month to the Metropolitan Council, Diocesan Chancellors, and heads of Stavropegial Institutions. I continue to manage the web calendar accessible through the home page of our website.

I continue to hold monthly or semi-monthly meetings with Archpriest Thomas Soroka, Project Manager for the Departments, and Archpriest Nicholas Solak, Chair of the Office of Pastoral Life. One of the goals is to maintain His Beatitude and the Central Administration up to date with the work of the Departments and the Office, but also to offer the Central Administration's support as needed.

I have especially worked closely with Fr. Nicholas on the drafting and submission of a grant proposal for the Christian Parenting and Caregiving Initiative through the Lilly Endowment. We anticipate an answer to our proposal in early summer.

Among the various meetings that I help arrange and coordinate, whether in person or via teleconference, one of the biggest events in recent months was the 10<sup>th</sup> Primatial Anniversary of His Beatitude. The event took place at St. Tikhon's Monastery immediately following the conclusion of the Regular 2022 Fall Session of the Holy Synod. The event started with a Vigil at the Monastery Church, a beautiful concert by the St. Tikhon's Choir, the Hierarchical and Synodal Divine Liturgy on Sunday morning, and a special banquet in Metropolitan Tikhon's honor in Scranton.

As indicated in the report of the Council Manager, we have intensified our work on the initial steps of the 21<sup>st</sup> All-American Council in 2025. Because of rising costs and limited availability—many large venues are already booked for the next several years—it would be wise to secure the location in the near future. So far, there are only two options that seem possibly to work for us. With the blessing of

His Beatitude, we would also like to put forth six names for the Preconciliar Commission. In accordance with the Statute, the Metropolitan Council nominates the members of the PCC who are then formally appointed by the Holy Synod.

**HUMAN RESOURCES.** Following the revision of the membership of the various committees of the Metropolitan Council, over the last few months I have been working closely with the Ethics and Human Resources Committee. Our work has so far focused on the new configuration of the Chancery staff, job descriptions, distinguishing employees from independent contractors, the drafting of a confidentiality agreement, and the need for standardized contracts for our independent contractors. The Committee had not been active for a few years and is now looking forward to working on numerous projects.

**ARCHIVES.** Since the 2022 Fall Session of the Metropolitan Council, I have made a couple of trips to St. Vladimir's and remained in contact with Dr. Tudorie and Ted Bazil who will oversee the transition of the Archives to the Seminary. Unfortunately, there has been a delay in the move of the Archives from the initially expected timeline due to the slow and lengthy bureaucratic process of the city of Yonkers, where the Seminary is situated. After several months, St. Vladimir's has finally received all permits needed. The seminary will be hiring a contractor in the coming days to prepare the space for the Archives. The shelving units were ordered months ago and should also be ready this month. The work by the contractor should only take about two weeks. Our current hope is to have the space ready by the end of March and to begin transferring the archival material immediately after.

While the archival material proper is largely ready to be moved to St. Vladimir's, a large area of the Westwood basement is still not properly organized and cleaned. The material that will not be received by the Seminary—because not strictly part of the Archives—and that will not be moved to the new Chancery office needs to be moved out of the building and offered to seminaries, libraries, etc. The direction to prepare the basement for the move of the Archives and the sale of Westwood was announced over three years ago. Unfortunately, only minimal and unsatisfactory progress has been made so far.

In Christ,

Priest Alessandro Margheritino  
Secretary of the Orthodox Church in America

# **Council Manager's Report for the 21<sup>st</sup> All American Council**

## **Metropolitan Council Spring 2023**

### **Deacon Peter Ilchuk**

#### **Introduction**

As many of you know, the site selection process has begun and we are now in the final stages of narrowing down some options for the 21<sup>st</sup> All American Council, slated to be held in July 2025. We have used some of the data from our Post Council Survey in scouting possible locations for the next Council.

ConferenceDirect is, once again, assisting us in site selection and contract negotiations. Still feeling the affects of post council momentum, the hotel industry is seeing a huge demand for meeting and events in person and we are seeing properties being booked as far out as 2028. It is always our goal to find a suitable location that balances the many factors that go into selecting an appropriate site for the Council.

#### **Preconciliar Commission**

The PCC will start to take shape later this month in an effort to start discussions and plans for the next Council. The proposed initial members of the PCC are Fr. Alexander Rentel, OCA Chancellor and Moderator, Fr. Alessandro Margheritino, OCA Secretary, Fr. Andrew Jarmus, Chancellor of the Bulgarian Diocese and previous AAC Clergy Chair, Hollie Benton, previous AAC Lay Chair, Lynnell McFarland, MC Member and previous AAC Local Lay Chair from the 16<sup>th</sup> AAC in Seattle. An Episcopal Chairperson will be appointed once the site of the council is recommended.

#### **Current Site Updates**

Over the past few months, I have made a couple of site visits to two properties that have submitted feasible proposals to host the 21<sup>st</sup> All American Council in July 2025.

#### **Chicago, IL**

In a rare occasion, we have received a proposal from the [Hyatt Regency at O'Hare International Airport in Rosemont, IL](#). Chicago has always been a very difficult city to receive a viable proposal from simply based on availability and costs. The hotel is currently offering us a rate of 167.00 + tax per room night. The available dates currently on hold for us would be July 13<sup>th</sup>, 2025 to July 21<sup>st</sup>, 2025.

Just as a side note, the Antiochian Archdiocese has booked this property for their convention for the week following our dates. The hotel informed me that they had booked these dates at the beginning of 2022.

There are a few pros and cons that accompany this proposal.

Pros:

1. Easy and Convenient location.
2. Free Transportation via hotel shuttle from O Hare International Airport.
3. Potentially strong local support for local committee.
4. Will fall within the overall council budget.
5. Traditional hotel meeting space that will work for the program.

Cons:

1. Not many food options within the hotel.
2. Questionable walkable area for some restaurants and entertainment options (Hotel offered free shuttle to/from entertainment district).
3. No swimming pool on site for kids or adults.
4. Some of the sleeping rooms are smaller and dated.
5. Not close to downtown or local attraction.

**Phoenix, AZ**

We have also received a proposal from the [Arizona Grand Resort and Spa located in Phoenix Arizona](#). This is an All-suite resort property with an 18-hole golf course and 8-acre waterpark onsite. The resort is currently offering us a rate of 179.00 which includes a reduced resort fee of 20.00. This would be the first time that an All-American Council will be held at a resort type property since 2002 in Orlando, Florida. The available dates currently on hold for us would be July 11<sup>th</sup> to July 18<sup>th</sup>, 2025. The pros and cons with this property are as follows:

Pros:

1. We would be the only group on the entire resort.
2. Water park on site for the kids (4 wristbands for each room included).
3. 3 Restaurants onsite that can be billed directly to your room (Mexican, Steak/BBQ, and American Fare).
4. Multiple quick service restaurants within walking distance on main road (Burger King, In and Out Burger, Pizza, Denny's).
5. Mall with Legoland, Aquarium, shops and restaurants less than 1 mile from resort.

Cons:

1. Phoenix in July
2. No transportation from airport (about 15 mins drive)
3. Possibility of a small local committee
4. Property is spread out in different buildings (Walkable, but golf carts available to transport people to/from meetings)
5. It's a resort property, so it's a different mindset from what we are used to.

### **OCA Statute Mandated Timeline**

- A. Agenda to be approved by HS and MC at Spring, 2025 meeting.
- B. Proposed Statute Revisions 90 Days prior (April 2025)
- C. PCC to publish agenda, notices and arrangements 60 days prior (May 2025)
- D. Chancery to publish credentials and certification 30 days prior (June 2025)
- E. Reports to be distributed by Chancery 30 days prior (June 2025)
- F. All statute changes, resolutions, etc. to be released 30 days prior (June 2025)

### **Conclusion**

While there are a number of details that still need to be finalized, we are still waiting to hear back from other areas of the country that would be available and able to host the 21<sup>st</sup> AAC based on the matrix of factors that would assist in the decision.

If you have any questions, comments, or concerns about anything in the report or about the All American Council in general; please feel free to reach me at any time via email at [pilchuk@oca.org](mailto:pilchuk@oca.org) or call or text me at 516-815-8890. Thank you.

Asking your continued prayers,

Deacon Peter Ilchuk

Council Manager

# Orthodox Church in America Internal Audit Report

Matushka Sharon Hubiak, Chair  
Maha Adranly, Member  
Diane Dorogy, Member

February 17, 2023

The Holy Synod of Bishops and Metropolitan Council  
Orthodox Church in America  
PO Box 31409  
Alexandria, VA 22310-9998

Your Beatitude, Your Eminences, Your Graces, Brothers and Sisters in Christ:  
Most Blessed Master Bless!

The Internal Audit Committee has spent the past two months performing the internal audit of the Orthodox Church in America (OCA). This year we were able to meet in person at the Chancery Finance office in Syosset for two days in December and performed additional follow-up remotely. In addition to the internal review of the accounting and fiscal systems and reports issued, we were asked to work with the Treasurer and Accounting Manager to review and develop internal controls for the Accounting and Finance department.

In all areas that we looked at, all were in good order with some concerns and recommendations we have listed below:

Much of our report suggests implementing specific internal controls. All of the controls noted have been reviewed and agreed upon with both the OCA Treasurer Andrew Smith and the Accounting Manager Susan Wisnewski. We have provided a summary list below. We have also attached our detailed report for reference.

- Individuals requesting payments from the OCA should submit a check request with supporting documentation attached for approval by an OCA employee familiar with the transaction prior to submission to the accounting department.
- A formal written documentation process should be initiated to add or remove individuals being paid stipends.
- Development or updating and implementation of certain accounting policies that should be summarized in a separate handbook and reviewed with employees as needed.
- Housing allowances for clergy should be approved by the Metropolitan Council, or the appropriate designee (i.e., Compensation Committee), prior to January 1<sup>st</sup> for the following year.
- Although the pension plan is not in the scope of our internal audit procedures, payments made by the OCA are included in our scope. The Metropolitan Council's minutes should document the review and approval of the pension plan request for reimbursement of specific monthly expenses. The approval should specify the period & specific dollar amount that the OCA will pay to the pension plan.

- A monthly, quarterly, and Annual Financial Close checklist should be implemented, identifying the activities needed to be completed to close out the month, quarter and year end along with who is responsible to complete and review including sign off of the tasks. Some of those tasks include review of bank reconciliations, payroll registers, Journal Entries, QB financial statements and audit logs by the Treasurer.

One of the most effective internal controls is the “tone at the top”. When top management complies with, 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.

### **Accounting adjustments**

Below is a summary of accounting adjustments identified during the audit procedures performed.

#### *Corrected*

1. Update liabilities on the financial statements to reflect the current status of the Retirement Obligations.
2. Reclassify the Cherion audit contributions (from the Bulgarian & Diocese of the South) from Supplies (account 6054) to Outside Services (account 6215).

#### *Uncorrected*

1. Update fixed assets to include only assets that are presently owned by the OCA. Fixed assets that have been disposed of should be written off and removed from the financial statements (i.e., architect’s work at Syosset). External auditors will be consulted about these write-offs.

### **Stavropegial institutions**

#### **St. Tikhon’s Seminary Audited Financial Statements**

The Seminary received a qualified audit opinion from the external auditors on its 2021 financial statements. There were two issues mentioned in the opinion.

- Accounting records were not adequate to document items recorded as repairs and maintenance expenses in 2021.
- Documentation regarding the endowment allocation for years prior to 2021 was not sufficient.

As internal auditors, we were unable to ascertain how the issues occurred that caused the inability of the auditors to rely on certain financial information provided by the Seminary. Additionally, we do not know if the issues that existed were corrected and proper controls put in place. As the seminary is a Stavropegial entity, we believe that this qualified audit opinion requires further investigation and explanation. We suggest that the Finance Committee of the Metropolitan Council have a thorough, detailed, and complete discussion with the appropriate seminary officers and board members as well as with both prior and current Seminary auditors to obtain further specific information about this situation.

Our review of non-audited institutions 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 any Stavropegial institution.

### Process improvements

As a part of our review procedures, we identified areas for process improvements. The items considered key are noted below. Additional areas identified can be found in our detailed report:

- Travel, entertainment, and expense report reporting - We recommend that expense reporting be updated to include the documentation and timing suggested by the IRS guidelines.
- Tax exempt certificate - It is suggested that the OCA limit the number of individuals who can order and purchase items for the OCA using OCA funds so that full advantage can be taken of the tax-exempt certificate where applicable.
- All American Council (ACC) - Involve the Accounting and Operations manager in the initial discussions of AAC planning to ensure OCA policies and procedures are followed. It is suggested that purchasing for the AAC be more centralized in the hands of a few people who are trained.
- Each state and the federal government have rules to determine if a paid individual is an employee or contractor. Additional training should be given to a single individual who would be responsible for onboarding employees, documenting payment arrangements, and communicating with contractors to prevent reclassification from contractor to employee status by governing authorities. Specific training and implementation of appropriate human resource policies are suggested to help the OCA meet documentation and implementation obligations.

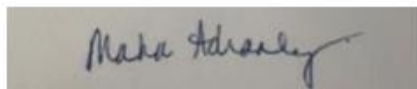
We would like to thank especially Susan Wisnewski and Andrew Smith for their promptness in replying to our requests and their great attention to detail regarding the finances of the Orthodox Church in America. If you have any questions or require additional details regarding our findings please let us know.

Yours in Christ,

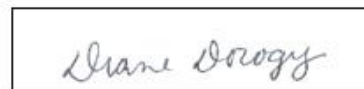
Matushka Sharon Hubiak, Chair



Maha Adranly, Member



Diane Dorogy, Member





## Orthodox Church in America

### Treasurer's Report

Metropolitan Council – March 2023

Your Beatitude, Reverend Fathers, brothers and sisters,

Greetings in Christ!

We recently closed the books on another busy, but successful year with respect to the financial management of the Orthodox Church in America. Along with the day-to-day transactions of the church, the finance staff:

- Managed significant fundraising efforts for Ukrainian refugees, the Diocese of Mexico, and the Diocese of Alaska;
- Continued discussions about the OCA Pension Plan;
- Facilitated the financial aspects of the Chancery relocation to the Washington D.C. area; and,
- Managed the financial aspects of the All-American Council.

What follows is the Treasurer's update on the finances of the OCA through the end of 2022 (including updated final financial activity pertaining to last year's All-American Council), with a look ahead at amendments to the 2023 budget and other 2023 activity. As you review these items in preparation for the Metropolitan Council meeting, please feel free to contact me at [asmith@oca.org](mailto:asmith@oca.org) with any questions.

#### **Fiscal Year 2022 – Preliminary Annual Results**

Enclosed as **Attachment A** is the year-end Treasurer's Report for 2022 OCA operating activities at 12/31/2021. The report includes:

- Statement of Operating Activity – Unrestricted
- Statement of Operating Activity – Restricted
- Comparative Balance Sheet for 12/31/2022 and 12/31/2021

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

Overall, revenue collection for the year was below expectation (97.4% of budget), with Diocesan contributions nonetheless coming in at a healthier 99% of expected budget. Notably, unrestricted individual giving (primarily through the Stewards of the OCA campaign) fell significantly short of expectations, though overall individual giving was significantly higher than normal when

considering restricted fundraising efforts in 2022 (Ukrainian Relief and support for the Diocese of Mexico and Diocese of Alaska). Expenses were below anticipated (93.34% of overall expense budget) which resulted in an overall modest increase in unrestricted net assets, without having to draw on unrestricted reserve as we had budgeted.

In addition to the annual operating activity (unrestricted revenue and expense), the following endowed fund investment activity is provided, showing a 15.37% decrease in value from 12/31/2021 to 12/31/2022:

	Market Val.	Market Val.	Annual Rate
Investment Accounts	12/31/2021	12/31/2022	of Return
Main Endowment Fund, incl Rotko	1,900,806.28	1,590,453.10	-16.33%
FOS Endowment Fund	129,651.38	102,644.54	-20.83%
St. Andrew Endowment Fund	150,008.97	126,589.09	-15.61%
Kavalenko	74,172.66	62,857.17	-15.26%
	2,254,639.29	1,882,543.90	-16.50%
OCCIF N/R (Mission Fund)	150,000.00	150,000.00	2.75% interest
Missions Fund	1,218,181.06	1,033,275.16	-15.18%
	1,368,181.06	1,183,275.16	-13.51%
	3,622,820.35	3,065,819.06	-15.37%

While this result is disappointing, it does compare favorably to the S&P 500, which closed 2022 down 20%. Of note is the fact that our endowed funds, despite the investment losses in 2022, are still collectively well capitalized (i.e., well “above water” with respect to the ratio of invested value to permanently restricted value).

In 2022, we received a \$50,000 unrestricted gift from the Al Foundos estate. Mr. Foundos’ heir suggested that this be designated, if possible, for youth programming. The Finance & Investment Committee recommends that the Metropolitan Council formalize this designation.

### All-American Council – 2022 Final Results

Since the Fall Metropolitan Council meeting, we finalized transactions associated with the 20th All-American Council held last summer in Baltimore. **Attachment B** shows the actual revenue received and expenses incurred (on an accrual basis) for the All-American Council in 2021 and 2022, compared to the overall budget for the Council. The Council was almost exactly on target for overall revenue and overall expenses (though there were some significant variances in individual line items). The Council resulted in a very modest net income of \$2,405.

## **2022 Internal Audit**

The Internal Audit Committee of the OCA met in person, with Accounting Manager Susan Wisnewski, at Westwood in December 2022 to conduct the annual internal audit. Upon completing their work, the Internal Audit Committee presented Susan and me with a draft of their report, soliciting our feedback, and then presented fully to the Finance & Investment Committee. Much of their report centers on ways to improve the internal control environment, in light of the specific request by the Metropolitan Council that they place emphasis on this area (there was a brief, but substantive, discussion of internal controls at the fall 2022 Metropolitan Council meeting in light of the external auditors' note that they don't opine on internal controls). Staff will work to implement these recommendations over the coming months. The Committee's written and verbal report will be provided under separate cover.

## **Employee Retention Tax Credit**

Staff is reviewing the option of applying for the [Employee Retention Tax Credit](#). **Attachment C** is a proposal from a CPA and accounting technology firm to help us determine eligibility and apply for this credit.

## **Fiscal Year 2023 – Budget Amendments**

At the Fall 2022 Metropolitan Council meeting, staff proposed and the Metropolitan Council adopted a 2023 budget. Since the Fall 2022 meeting, staff has worked with the Finance & Investment Committee to consider a number of changes. Included in these changes are a refinement of revenue expectations, update of certain key expense categories, and increased expenses associated with His Beatitude's request, at the Spring 2022 Metropolitan Council meeting, that the Treasurer work with the Finance & Investment Committee to review OCA central administration compensation in light of, among other things, the OCA Clergy Compensation guidelines.

Included as **Attachment D** is a budget document that shows the 2023 original budget, 2023 proposed amendments, and the 2023 proposed amended budget in columns D, E, and F, respectively (columns A, B, and C show 2022 budget-to-actual comparisons). The following pages include more detail about the proposed amendments at the account level. This amended budget proposes the use of \$96K in unrestricted reserves to help pay for what we hope non-recurring operating expenses in 2023 (e.g., final expenses associated with the move to D.C. (\$20K), anticipated one-time legal fees (\$50K), and the Payment in lieu of taxes (PILOT) (\$40K) on the Westwood property, which would be eliminated upon the sale of the property).

Staff and the Finance & Investment Committee recommend that the Metropolitan Council adopt the 2023 budget as amended in **Attachment D**.

Respectfully Submitted,

Andrew Smith, Treasurer



# ORTHODOX CHURCH in AMERICA

## **Treasurer's Report**

December 31, 2022

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 2022. Overall, we show a fairly healthy operating surplus through the year, without any need to release from reserves.

However, non-operating (i.e., temporarily restricted) activity has seen a significant decrease for the year, due mostly to investment losses.

Included in this Treasurer's Report for the period ended Dec. 31, 2022 are the following:

- \* Statement of Operating Activity - Unrestricted
- \* Statement of Operating Activity - Restricted
- \* Comparative Balance Sheet for December 31, 2022 and December 31, 2021

December 31, 2022 represents the end of the OCA's fiscal year, so the target for operating revenues and is 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 \$2.019M including our anticipated annual endowment draw and use of restricted funds for 2022, on an annual budget of \$2,098K (96.25%). Diocesan contributions were at 99.00% of budget and individual/business contributions were significantly less than expected.

### **Expenses**

Expenses incurred through December were \$1.958M on an annual budget of \$2,098K (93.34%). The positive expense variance is due to a number of factors, including employee vacancies and less-than-anticipated use of outside contractors. Further, in some departments, there was less travel and associated expenses than expected and well as overall underspending on property expenses.

### **Net Income**

Unrestricted net income is a \$61K surplus through the year. This includes the anticipated endowment and restricted fund draw, but no release from operating reserves.

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

In Christ,

Andrew D. Smith  
Treasurer

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2022 - **Preliminary & Unaudited**  
December 31, 2022

		A	B	C
<i>Unrestricted</i>		<b>YEAR TO</b>	<b>ANNUAL</b>	<b>Target</b>
		<b>DATE</b>	<b>BUDGET</b>	<b>100.00%</b>
				<b>% BUDGET</b>
				<b>USED</b>
1	<b>REVENUE</b>			
2	Diocesan Contributions	1,721,840	1,739,220	99.00%
3	Individual/Business Contributions	86,182	125,000	68.95%
4	Service Fees	51,321	20,000	256.60%
5	Interest Income/Realized Gains/Losses	4,207	-	
6	Appeals	7,490	-	
7	Special Events	-	-	
8	Other	41,267	-	
9	Release from Restriction - Endowed	82,559	75,000	110.08%
10	Release from Restriction - Restricted	24,221	68,000	35.62%
11	Use of Unrestricted Reserve	-	70,626	
12	<b>TOTAL REVENUE</b>	<b>2,019,088</b>	<b>2,097,846</b>	<b>96.25%</b>
13				
14				
15				
16	<b>EXPENSES</b>			
17	Administration	504,279	433,680	116.28%
18	Executive	575,559	735,522	78.25%
19	Archives	100,310	103,699	96.73%
20	External Affairs	54,898	30,000	182.99%
21	Chapel	678	4,400	15.41%
22	Property	170,184	199,230	85.42%
23	TOC/Comm	26,104	78,500	33.25%
24	Holy Synod	68,646	66,300	103.54%
25	Metropolitan's Office	75,829	68,400	110.86%
26	Metropolitan Council	65,705	32,450	202.48%
27	St. Catherine's	66,041	73,710	89.60%
28	SOCA	-	-	
29	BOT	-	10,000	0.00%
30	Mission Planting Grants	56,000	68,000	82.35%
31	Ordination Candidacy	-	12,000	0.00%
32	Canons & Statutes	-	-	
33	ORSMA	44,275	32,755	135.17%
34	Continuing Ed	-	-	
35	Seminaries	18,000	18,000	100.00%
36	Departments	131,524	131,200	100.25%
37	<b>TOTAL EXPENSES</b>	<b>1,958,031</b>	<b>2,097,847</b>	<b>93.34%</b>
38				
39	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>61,057</b>	<b>0</b>	

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2022 - Preliminary & Unaudited  
December 31, 2022

<i>Restricted &amp; Designated Activity</i>	A	B	C	D	E	F	G	H	I	J	K
	Ukrainian Refugee Appeal	Archives Digitization	Archives Facility	All-American Council	Lilly Grant	Duke Reflect Grant	Mission Planting	Youth Director	Total Restr. Funds	Endowment Activity	Total Restricted
<b>REVENUE</b>											
1 Diocesan Contributions				254,713					254,713		254,713
2 Individual/Business Contributions	738,566			2,500				51,000	792,066	3,000	795,066
3 Legacies and Bequests							80,000		80,000	13,834	93,834
4 Dividends, Interest									-	56,526	56,526
5 Other Investment Revenue (Realized)									-	(109,424)	(109,424)
6 Service Fees									-		-
7 Vendor				27,500					27,500		27,500
8 Observer				58,408					58,408		58,408
9 Ads				11,115					11,115		11,115
10 Banquet									-		-
11 Interest Income/Realized Gains/Losses									-		-
12 Appeals									-		-
13 Special Events									-		-
14 Other (incl Grants)						15,000			15,000		15,000
15 <b>TOTAL REVENUE</b>	<b>738,566</b>	<b>-</b>	<b>-</b>	<b>354,236</b>	<b>-</b>	<b>15,000</b>	<b>80,000</b>	<b>51,000</b>	<b>1,238,802</b>	<b>(36,064)</b>	<b>1,202,738</b>
<b>EXPENSES</b>											
16 6050 Distributions - Grants/Endowments									-	5,389	5,389
17 6095 Bank Fees	16,583			1,292					17,875		17,875
18 6105 Food					89	106			195		195
19 6110 Flowers/Candles/Liturgical Items				75					75		75
20 6211 Accounting Fees									-	500	500
21 6215 Outside Contract Services			33,463	104,798	300				138,561		138,561
22 6217 Investment Advisory Fees									-	15,484	15,484
23 6253 Program Supplies				34,850					34,850		34,850
24 6284 Equip Rental					1,799				1,799		1,799
25 6503 Printing and Copying			187	8,723					8,910		8,910
26 6504 Supplies				724	11,783	1,112			13,619		13,619
27 6516 Misc Other	723,143								723,143		723,143
28 6650 Stipends				13,550	83,606	1,500			98,656		98,656
29 6733 Website					300				300		300
30 6831 Conference, Convention, Meeting					11,512				11,512		11,512
31 6832 Travel		541		32,170	29,050	2,341			64,100		64,100
32 6833 Lodging				92,214	24,194				116,407		116,407
33 6834 Meals				98,010	123	14			98,147		98,147
34 7060 Unrealized Gains/Losses									-	483,230	483,230
35 7500 Change in the Value of Unitrusts									-	(7,687)	(7,687)
36 Release to Unrestricted (est.)							21,216		21,216	82,559	103,776
37 <b>TOTAL EXPENSES</b>	<b>739,726</b>	<b>541</b>	<b>33,650</b>	<b>386,405</b>	<b>162,755</b>	<b>5,073</b>	<b>21,216</b>	<b>-</b>	<b>1,349,366</b>	<b>579,475</b>	<b>1,928,841</b>
38 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>(1,160)</b>	<b>(541)</b>	<b>(33,650)</b>	<b>(32,169)</b>	<b>(162,755)</b>	<b>9,927</b>	<b>58,784</b>	<b>51,000</b>	<b>(110,564)</b>	<b>(615,539)</b>	<b>(726,103)</b>
			<b>[A]</b>	<b>[B]</b>	<b>[C]</b>					<b>[D]</b>	

**NOTES**

- [A] Archives Relocation Fund began the year with a balance from the prior year (\$98K); this year's expenses are drawn from those reserves.
- [B] The All-American Council shows a deficit in 2022; however, when combined with activity recognized in 2021, the Council had a modest overall surplus.
- [C] The Lilly Grant (Thriving in Ministry) began the year with a balance from the prior year (\$265K); this year's expenses are drawn from those reserves.
- [D] Deficit in Endowment activity attributable primarily to investment performance.

**ORTHODOX CHURCH IN AMERICA**  
Balance Sheet - FY2022 - **Preliminary & Unaudited**  
December 31, 2022

A	B	C	D
	<u>12/31/2022</u>	<u>12/31/2021</u>	<b>DIFFERENCE</b>
1 <b>ASSETS</b>			
2 Cash & Cash Equivalents - Operating	1,327,171	1,526,440	(199,269)
3 Cash & Cash Equivalents - Restricted	628,675	768,581	(139,906)
4 Petty Cash	142	426	(284)
5			
6 Accounts Receivable	136,963	112,186	24,778
7 Grants Receivable	-	-	-
8 Prepaid Expense	-	21,676	(21,676)
9 Other Current Assets	-	-	-
10			
11 Fixed Assets, net of depreciation	292,193	327,510	(35,317)
12 Investments	3,125,299	3,686,745	(561,446)
13			
14 <b>Total Assets</b>	<u>5,510,444</u>	<u>6,443,563</u>	<u>(933,118)</u>
15			
16			
17 <b>LIABILITIES</b>			
18 Accounts Payable	81,491	5,090	76,401
19 Accrued Expenses	2,480	36,364	(33,884)
20 Retirement Obligation	-	37,552	(37,552)
21 Unitrust Liability	82,107	94,238	(12,131)
22 Payroll Liabilities	122	-	122
23 Other Liabilities	-	-	-
24			
25 Deferred Revenue	-	267,812	(267,812)
26			
27 <b>Total Liabilities</b>	<u>166,199</u>	<u>441,056</u>	<u>(274,857)</u>
28			
29			
30 <b>NET ASSETS</b>	<u><u>5,344,245</u></u>	<u><u>6,058,118</u></u>	<u><u>(713,873)</u></u>



**ORTHODOX CHURCH IN AMERICA**  
**20th All-American Council Budget to Actual**  
*Accrual Basis, through 2/16/2023*

	A	B	C	D	E	F
	Activity	Activity	AAC 2022	AAC 2022	Budget	% Budget
	Recog. 2021	Recog. 2022	Total	Budget	Variance	Recognized
1	<b>REVENUE</b>					
2						
3						
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22	<b>EXPENSES</b>					
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# *Rogers & Co Technology Consultants LLC*

*534 Broadhollow Road  
Melville, NY 11747*

*516-338-9500  
www.rcotech.com  
info1@rcotech.com*

February 1, 2023  
Orthodox Church in America  
PO Box 675 Syosset, NY 11791

Dear Ed:

Rogers & Co (“firm,” “we,” “us,” or “our”) is pleased to provide Orthodox Church in America (“you” or “your”) with the professional services described below. This letter, and the attached Terms and Conditions Addendum and any other attachments incorporated herein (collectively, “Agreement”), confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. The engagement between you and our firm will be governed by the terms of this Agreement.

## **Engagement Objective and Scope**

We will prepare and submit an appeal for your ERTC TAX CREDIT. Including ERTC calculations and Employers Quarterly Federal Tax Return Amendments to claim the ERTC. We will prepare the amendments from information you supply. Our basic understanding is that your prior prepared tax returns did not include the tax credit. We will prepare a worksheet and amended 941 tax returns to claim these credits from Internal Revenue Service. We will not be amending, correcting, reviewing or be providing any other tax services for this engagement. We will provide any answers IRS requests from the taxpayer, but we cannot Guarantee the credit will be awarded. Any recommendations included in the deliverable(s) will be based upon information you provide. Based on preliminary calculations we are estimating a credit for 2020 is \$60,000 and for 2021 is \$150,000

Our advice is dependent upon the timeliness, accuracy and completeness of the information and representations that we receive from you, as well as your stated intended use of the advice. Providing us with inaccurate or incomplete information or representations may result in inaccurate findings or inappropriate recommendations, and critical recommendations may not be identified. If information changes during the course of the engagement, you must provide us with the updated information and representations on a timely basis, as the change in information may affect our advice. We will not audit or

otherwise verify the data you submit to us, although we may ask you to clarify certain information.

Our engagement does not include any procedures designed to detect errors, fraud, or theft. Therefore, our engagement cannot be relied upon to disclose such matters. In addition, we are not responsible for identifying or communicating deficiencies in your internal controls. You are responsible for developing and implementing internal controls applicable to your operations. This engagement is limited to the professional services outlined above.

The deliverable(s) presented as part of this engagement are for internal use only and are not to be distributed externally to third parties except to IRS or SBA, in whole or in part, or used for any other purpose, without the express written permission of the firm. You agree to indemnify and hold us harmless with respect to any and all claims arising from the use of these tax consulting services by unauthorized third parties regardless of the nature of the claim, including negligence of any party. Our advice is based upon tax reference materials, facts, assumptions, and representations that are subject to change. Tax reference materials include, but are not limited to, the Internal Revenue Code ("IRC"), regulations, Revenue Rulings, Revenue Procedures, Private Letter Rulings, court decisions, and similar state and local guidance. We will not update our advice after the conclusion of the engagement for subsequent legislative or administrative changes or future judicial interpretations. To the extent we provide written advice concerning federal tax matters, we will follow the guidance contained in U.S. Treasury Department Circular 230 ("Circular 230"), §10.37, Requirements for Written Advice. We may be available to update our advice as a separate engagement. If you ask us to update our work for changes in the information or representations that you provide to us or tax law changes, and we agree to perform this update, we will confirm this engagement in a separate agreement. If for any reason we are unable to complete the engagement, we will not issue the deliverable(s).

**CPA Firm Responsibilities** We will perform our services in accordance with the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants ("AICPA") and the AICPA Statement on Standards for Consulting Services. These services are not considered personal financial planning services because we do not consider ourselves to be personal financial planners. As such, the AICPA Statement on Standards in Personal Financial Planning do not apply. It is our duty to perform services with the same standard of care that a reasonable tax return preparer would exercise in this type of engagement. It is your responsibility to safeguard your assets and maintain accurate records pertaining to transactions.

We will not hold your property in trust for you, or otherwise accept fiduciary duties in the performance of the engagement. Rogers & Co, in its sole professional judgment, reserves the right to refuse to take any action that could be construed as making management decisions or performing management functions on your behalf.

## **Arguable positions**

We will use our professional judgment to resolve questions in your favor where a tax law is unclear, provided that we have a reasonable belief that there is substantial authority for doing so. If there are conflicting interpretations of the law, we will explain the possible positions that may be taken on your return. We will follow the position you request, provided it is consistent with our understanding of tax reference materials. If the IRS, state or local tax authorities later contest the position you select, additional tax, penalties, and interest may be assessed. We assume no liability, and you hereby release us from any liability, including but not limited to, additional tax, penalties, interest, and related professional fees you may incur.

## **Client Responsibilities**

You agree to provide us with complete copies of previously filed tax returns, supporting schedules and any other records or information that we may request, either at the inception or during the course of the engagement

## **Communication of authority of others.**

You hereby authorize the following individuals to communicate directly with us to request services and obtain copies of tax and financial information on your behalf: Susan Wisnewski

You agree that the authority conveyed above shall continue in full force and effect until you inform us of any modifications in writing.

## **Online access to information.**

To the extent you provide our firm with access to electronic data via a local or online database from which we will download your trial balance or other information, you agree that the data is accurate as of the date and time you authorize it to be downloaded.

## **Ultimate responsibility**

You have final responsibility for the accuracy of your tax consulting services. We will provide you with a copy of the deliverable(s) for review prior to finalization. You agree to review and examine deliverables carefully for accuracy and completeness. You are solely responsible for implementation of any strategies discussed in the deliverable(s). Timing of the Engagement Our engagement shall commence upon receipt of this executed Agreement. Our services will conclude after one of the following events has occurred:

- transmission of the deliverable(s) as identified above,
- as of the date of our closure letter;
- notice to you that no deliverable(s) will be provided,
- written notification by either party that the engagement is terminated, or
- one (1) year from the execution date of this Agreement.

### **Penalties and Interest Charges**

Federal, state, and local tax authorities impose various penalties and interest charges for non-compliance with tax laws and regulations, including failure to file or late filing of returns, and underpayment of taxes. You, as the taxpayer, remain responsible for the payment of all tax, penalties, and interest charges imposed by tax authorities.

### **Professional Fee**

Our professional fee for the services outlined above is estimated \$6,000 for 2020 and \$15,000 for 2021, [which is only due on awarding of the credit which is the receipt of the funds](#). This fee is based upon the complexity of the work to be performed, and our professional time, as well as out-of-pocket expenses. In addition, this fee depends upon the timely delivery, availability, quality, and completeness of the information you provide to us. You agree that you will deliver all records requested and respond to all inquiries made by our staff to complete this engagement on a timely basis. You agree to pay all fees and expenses incurred whether or not we finalize our advice. Finally, the procedures, methods used by Rogers & Co Technology consultants are trade secrets and should be protected as appropriate. Any disclosure of our methods would severely damage our firm and should be protected as warranted.

We appreciate the opportunity to be of service to Orthodox Church in America. Please date and execute this Agreement and return it to us to acknowledge your acceptance. We will initiate services when we receive the executed Agreement.

Very truly yours,

Eric Rogers  
Partner

**ORTHODOX CHURCH IN AMERICA**

2023 Budget - Summary

For consideration at Spring 2023 Metropolitan Council meeting

	Target			D	E	F
	A	B	C			
<i>Unrestricted</i>	YTD Actual	BUDGET	% BUDGET	BUDGET	Amendments	BUDGET
	12/31/2022	Amended 2022	USED	Original 2023		Amended 2023
<b>1 REVENUE</b>						
2 Diocesan Contributions	1,721,840	1,739,220	99.00%	1,739,509	(37,847)	1,701,662
3 Individual/Business Contributions	86,182	125,000	68.95%	142,920	2,080	145,000
4 Appeals	7,490					
5 Service Fees	51,321	20,000	256.60%	22,350	-	22,350
6 Interest Income/Realized Gains/Losses	4,207	-		-	-	
7 Other	41,267	-		-	-	
8 Release from Restriction - <i>Endowed Funds</i>	75,000	75,000	100.00%	75,000	-	75,000
9 Release from Restriction - <i>Restricted Funds</i>	56,000	68,000	82.35%	68,000	44,000	112,000
10 Use of Unrestricted Reserve		70,626		63,000	32,946	95,946
<b>11 TOTAL REVENUE</b>	<b>2,043,307</b>	<b>2,097,846</b>	<b>97.40%</b>	<b>2,110,779</b>		<b>2,151,958</b>
12						
13						
14						
<b>15 EXPENSES</b>						
16 Compensation & Benefits						
17 Administration	270,879	228,490	118.55%	196,661	p.2 101,551	298,212
18 Executive	520,899	589,137	88.42%	551,853	p.3 (73,109)	478,744
19 Archives	95,760	102,199	93.70%	101,888	p.4 -	101,888
20 External Affairs	-	-		-		-
21 Property	-	-		-		-
22 ORSMA	488	-		-		-
<b>23 Total Compensation &amp; Benefits</b>	<b>888,025</b>	<b>919,826</b>	<b>96.54%</b>	<b>850,402</b>		<b>878,844</b>
24						
25 Goods & Services						
26 Administration	233,400	205,190	113.75%	380,561	p.2 40,460	421,021
27 Executive	54,660	146,385	37.34%	68,900	p.3 3,000	71,900
28 Archives	4,551	1,500	303.37%	1,500	p.4 -	1,500
29 External Affairs	54,898	30,000	182.99%	15,000	p.5 15,000	30,000
30 Chapel	678	4,400	15.41%	-		-
31 Property, incl depr.	170,184	199,230	85.42%	131,722	p.6 5,578	137,300
32 TOC/Comm	26,104	78,500	33.25%	51,300	p.8 -	51,300
33 Holy Synod	68,646	66,300	103.54%	66,300	p.8 5,100	71,400
34 Metropolitan's Office	75,829	68,400	110.86%	115,347	p.8 (17,000)	98,347
35 Metropolitan Council	65,705	32,450	202.48%	32,450	p.8 -	32,450
36 St. Catherine's	66,041	73,710	89.60%	91,323	p.9 (632)	90,691
37 BOT	-	10,000	0.00%	-		-
38 Mission Planting Grants	56,000	68,000	82.35%	68,000	p.9 44,000	112,000
39 Ordination Candidacy	-	12,000	0.00%	12,000	p.9 (6,000)	6,000
40 Canons and Statutes	-	-		-		-
41 ORSMA	43,788	32,755	133.68%	42,760	p.7 -	42,760
42 Seminaries	18,000	18,000	100.00%	18,000	p.9 -	18,000
43 Departments	131,524	131,200	100.25%	165,215	p.9 (76,770)	88,445
44 Office of Pastoral Life (new cost center)					76,770	76,770
<b>45 Total Goods &amp; Services</b>	<b>1,070,006</b>	<b>1,178,020</b>	<b>90.83%</b>	<b>1,260,378</b>		<b>1,273,113</b>
46						
<b>47 TOTAL EXPENSES</b>	<b>1,958,031</b>	<b>2,097,847</b>	<b>93.34%</b>	<b>2,110,780</b>		<b>2,151,958</b>
48						
<b>49 REVENUE OVER/(UNDER) EXPENSES</b>	<b>85,276</b>	<b>(1)</b>		<b>(0)</b>		<b>0</b>

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6010-05 Administration-Salaries	206,693.78	169,221.20		144,641.13	77,657.91	222,299.05
6011-05 Administration-Payroll Expense	-					
6012-05 Administration-FICA/MED	8,137.41	12,945.42		11,065.05	5,940.83	17,005.88
6013-05 Administration-Unemployment Ins W/H	2,858.77					
6014-05 Administration-Payroll Processing Fees	2,283.45	3,000.00		3,000.00	-	3,000.00
6015-05 Administration-Health Insurance	28,236.18	20,995.56		23,111.04	8,769.48	31,880.52
6016-05 Administration-Workers Compensation/Disabili	2,836.78	434.90		402.61	207.43	610.03
6017-05 Administration-Pension expense	15,991.04	13,943.21		13,567.76	8,975.36	22,543.12
6018-05 Administration-Life Insurance	3,841.20	7,950.00		873.00	-	873.00
	<u>270,878.61</u>	<u>228,490.30</u>	118.55%	<u>196,660.59</u>	<u>p.1 line 16</u>	<u>298,211.59</u>
6095-05 Administration-Bank Fees	5,185.40	2,200.00		2,200.00	2,800.00	5,000.00
6096-05 Administration-Dues	2,445.00	10,000.00		-		-
6100-05 Administration-Office Expense	-	-				
6105-05 Administration-Food	2,096.26	3,200.00		4,200.00	(1,200.00)	3,000.00
6110-05 Administration-Flowers/Candles/Liturgical item	12.94			600.00		600.00
6210-05 Administration-Contract Services	-	-		-		
6211-05 Administration-Accounting Fees	17,652.69	20,000.00		25,000.00	-	25,000.00
6214-05 Administration-Legal Fees	297.00	10,000.00		10,000.00	50,000.00	60,000.00
6215-05 Administration-Outside Contract Services	6,000.00	-		-		
6280-05 Administration-Rent	38,710.00			66,360.00	[A]	66,360.00
6290-05 Administration-Repairs Expense	-	-		-		
6502-05 Administration-Postage, Mailing Service	4,114.00	3,000.00		2,000.00	2,000.00	4,000.00
6503-05 Administration-Printing and Copying	6,626.00	3,450.00		3,450.00	3,000.00	6,450.00
6504-05 Administration-Supplies	14,987.72	3,200.00		6,200.00	5,800.00	12,000.00
6505-05 Administration-Telephone, Telecommunication:	-	-		-		
6507-05 Administration-Equipment leasing	-	-		-		
6511-05 Administration-Advertising Expenses	-	-		-		
6512-05 Administration-Insurance - Liability, D and O	-	-		8,729.25		8,729.25
6516-05 Administration-Misc Other	-	-		-		
6650-05 Administration-Stipends	75,006.00	71,400.00		71,400.00	(5,400.00)	66,000.00
6670-05 Administration-Computer expense	1,059.96	4,000.00		-		
6671-05 Administration-Computer software	-					
6720-05 Administration-Telephone	888.91	1,200.00		1,500.00		1,500.00
6725-05 Administration-Mobile Phones	-					
6727-05 Administration-Internet	3,372.90	4,000.00		4,000.00		4,000.00
6733-05 Administration-Website	-	-		-		
6750-05 Administration-Insurance	22,482.00	41,040.00		41,040.00	(18,540.00)	22,500.00
6831-05 Administration-Conference, Convention, Meetin	199.00	-		199.00		199.00
6832-05 Administration-Travel	3,469.72			-		
6833-05 Administration-Lodging	-	-		-		
6834-05 Administration-Meals	1,615.01	2,000.00		2,000.00		2,000.00
6835-05 Administration-Moving Expenses	25,043.88			20,000.00		20,000.00
6900-05 Administration-Automobile	2,029.24			182.73	2,000.00	2,182.73
6902-05 Administration-Auto repairs	106.61	-		-		
6903-05 Administration-Auto gasoline	-	1,500.00		1,500.00		1,500.00
6910-05 Administration-Other	-	25,000.00		110,000.00	[B]	110,000.00
	<u>233,400.24</u>	<u>205,190.00</u>	113.75%	<u>380,560.98</u>	<u>p.1 line 25</u>	<u>421,020.98</u>

[A] Reclass of D.C. office rent from Property Support  
[B] \$9,000 per month in support of Pension Plan administrative expenses  
(cf. Attachment G [Item #4] to the Pension Plan's fall 2022 MC report)



**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6010-07 Executive-Salaries	410,087.55	442,227.11		448,650.12	(52,657.91)	395,992.20
6012-07 Executive-FICA/MED	4,940.75	33,830.37		5,558.33	(5,558.33)	-
6014-07 Executive-Payroll Processing Fees	-	-		-	-	-
6015-07 Executive-Health Insurance	70,281.68	68,592.30		42,994.56	(8,769.48)	34,225.08
6016-07 Executive-Workers Compensation/Disability		2,065.97		2,013.04	(147.43)	1,865.61
6017-07 Executive-Pension expense	35,588.59	42,421.33		52,636.58	(5,975.36)	46,661.23
	<u>520,898.57</u>	<u>589,137.09</u>	88.42%	<u>551,852.63</u>	p.1 line 17	<u>478,744.12</u>
6095-07 Executive-Bank Fees	-	-		-	-	-
6096-07 Executive-Dues	-	-		-	-	-
6105-07 Executive-Food	405.68	-		-	-	-
6110-07 Executive-Flowers/Candles/Liturgical Items	370.74	-		-	-	-
6504-07 Executive-Supplies	891.93	3,500.00		3,500.00	-	3,500.00
6650-07 Executive-Stipends	30,150.00	75,000.00		30,000.00	12,000.00	42,000.00
6704-07 Executive-Gas	-	-		-	-	-
6720-07 Executive-Telephone	-	-		-	-	-
6725-07 Executive-Mobile Phones	6,634.76	5,000.00		7,200.00	-	7,200.00
6832-07 Executive-Travel	14,333.43	27,000.00		27,000.00	(9,000.00)	18,000.00
6833-07 Executive-Lodging	-	21,000.00		-	-	-
6834-07 Executive-Meals	1,688.00	1,200.00		1,200.00	-	1,200.00
6835-07 Executive-Moving Expenses	185.47	-		-	-	-
6903-07 Executive-Auto gasoline	-	-		-	-	-
6910-07 Executive-Other Administrative Expense	-	13,685.00		-	-	-
	<u>54,660.01</u>	<u>146,385.00</u>	37.34%	<u>68,900.00</u>	p.1 line 26	<u>71,900.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6010-08 Archives-Salaries	69,128.00	68,837.99		72,968.27		72,968.27
6012-08 Archives-FICA/MED	5,266.80	5,266.11		5,582.07		5,582.07
6013-08 Archives-Unemployment Ins W/H		-		-		
6015-08 Archives-Health Insurance	14,481.11	20,995.56		14,372.28		14,372.28
6016-08 Archives-Workers Compensation/Disability		215.60		209.62		209.62
6017-08 Archives-Pension expense	6,883.92	6,883.80		8,756.19		8,756.19
	<u>95,759.83</u>	<u>102,199.06</u>	<u>93.70%</u>	<u>101,888.43</u>	p.1 line 18	<u>101,888.43</u>
6092-08 Archives-Business Registration Fees	-	200.00		200.00		200.00
6105-08 Archives-Food	-	-		-		
6214-08 Archives-Legal Fees	350.00					
6215-08 Archives-Outside Contract Services	4,125.00					
6280-08 Archives-Facilities and Equipment	-	-		-		
6503-08 Archives-Printing and Copying	-	-		-		
6504-08 Archives-Supplies	75.55	800.00		800.00		800.00
6832-08 Archives-Travel	-	500.00		500.00		500.00
	<u>4,550.55</u>	<u>1,500.00</u>	<u>303.37%</u>	<u>1,500.00</u>	p.1 line 27	<u>1,500.00</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6010-09 External Affairs-Salaries	-	-		-		
6012-09 External Affairs-FICA/MED	-	-				
6013-09 External Affairs-Unemployment Ins W/H	-	-		-		
6016-09 External Affairs-Workers Compensation/Disabil	-	-		-		
6017-09 External Affairs-Pension expense	-	-		-		
	-	-	#DIV/0!	-		
6051-09 External Affairs-Charity Distributions	10,000.00					
6096-09 External Affairs-Dues	25,208.00	10,000.00		10,000.00	15,000.00	25,000.00
6110-09 External Affairs-Flowers/Candles/Liturgical	500.00					
6215-09 External Affairs-Outside Contract Services	-					
6253-09 External Affairs-Program Supplies	-			-		
6504-09 External Affairs-Supplies	-			-		
6650-09 External Affairs-Stipends	-	15,000.00		-		
6670-09 External Affairs-Computer expense	-			-		
6720-09 External Affairs-Telephone	-			-		
6725-09 External Affairs-Mobile Phones	-					
6831-09 External Affairs-Conference, Convention, Meetin	2,434.18			-		
6832-09 External Affairs-Travel	16,383.00	5,000.00		5,000.00	-	5,000.00
6834-09 External Affairs-Meals	372.61	-		-		
	<u>54,897.79</u>	<u>30,000.00</u>	<u>182.99%</u>	<u>15,000.00</u>	p.1 line 28	<u>30,000.00</u>

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6010-11 Property Support-Salaries	-	-		-		
6012-11 Property Support-FICA/MED	-	-		-		
6013-11 Property Support-Unemployment Ins W/H	-	-		-		
6015-11 Property Support-Health Insurance	-	-		-		
6016-11 Property Support-Workers Compensation/Disability	-	-		-		
6017-11 Property Support-Pension expense	-	-		-		
	<u>-</u>	<u>-</u>		<u>-</u>		
6100-11 Property Support-Office expense	-	-		-		
6115-11 Property Support-Office Expense - Other	-	-		-		
6214-11 Property Support-Legal Fees	630.00					
6215-11 Property Support-Outside Contract Services	9,440.00	13,500.00		6,750.00	3,250.00	10,000.00
6273-11 Property Support-Real Estate, Personal Prop Ta	38,865.30	32,855.00		32,855.00	7,145.00	40,000.00
6280-11 Property Support-Facilities and Equipment	-	72,500.00		-	[A]	
6284-11 Property Support-Equip Rental and Maintenanc	-	-		-		
6285-11 Property Support-Janitorial Services	100.00					
6286-11 Property Support-Lawn	32,430.00	30,000.00		30,000.00		30,000.00
6287-11 Property Support-Exterminating	-	500.00		500.00		500.00
6288-11 Property Support-Garbage Removal	2,808.43	2,075.00		2,604.00	396	3,000.00
6290-11 Property Support-Repairs expense	234.55	3,000.00		3,000.00		3,000.00
6504-11 Property Support-Supplies	415.86	600.00		600.00		600.00
6701-11 Property Support-Heating oil	21,206.79	16,000.00		16,000.00	4,000.00	20,000.00
6703-11 Property Support-Water	59.69	200.00		200.00		200.00
6705-11 Property Support-Electricity	11,114.91	11,000.00		12,000.00		12,000.00
6750-11 Property Support-Insurance	17,561.60	-		-	18,000.00	18,000.00
6900-11 Property Support-Automobile	-	-		-		
6901-11 Property Support-Auto insurance	-	-		-		
6990-11 Property Support-Depreciation expense	35,316.72	17,000.00		27,213.00	(27,213.00)	-
	<u>170,183.85</u>	<u>199,230.00</u>	<u>85.42%</u>	<u>131,722.00</u>	<u>p.1 line 30</u>	<u>137,300.00</u>

[A] Office rent reclassified to Administration

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

	YTD Actual	BUDGET	% BUDGET	BUDGET		BUDGET
				12/31/2022	Amended 2022	USED
6010-35 Sexual Misconduct Committ-Salaries	-	-		-		
6012-35 Sexual Misconduct Committ-FICA/MED	-	-		-		
6013-35 Sexual Misconduct Committ-Unemployment Ins	-	-		-		
6015-35 Sexual Misconduct Committ-Health Insurance	487.80	-		-		
6016-35 Sexual Misconduct Committ-Workers Compens:	-	-		-		
	<u>487.80</u>	<u>-</u>	<u>#DIV/0!</u>	<u>-</u>		
6092-35 Sexual Misconduct Committ-Business Registrati	-	-		-		
6095-35 Sexual Misconduct Committ-Bank Fees	-	-		-		
6215-35 Sexual Misconduct Committ-Outside Contract S	14,889.90	12,000.00		12,000.00		12,000.00
6502-35 Sexual Misconduct Committ-Postage, Mailing Se	-	55.00		60.00		60.00
6504-35 Sexual Misconduct Committ-Supplies	-	100.00		100.00		100.00
6650-35 Sexual Misconduct Committ-Stipends	27,917.00	20,000.00		30,000.00		30,000.00
6670-35 Sexual Misconduct Committ-Computer Expense	149.90					-
6832-35 Sexual Misconduct Committ-Travel	830.73	600.00		600.00		600.00
6834-35 Sexual Misconduct Committ-Meals	-	-		-		
	<u>43,787.53</u>	<u>32,755.00</u>	<u>133.68%</u>	<u>42,760.00</u>	<u>p.1 line 40</u>	<u>42,760.00</u>

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

	YTD Actual 12/31/2022	BUDGET Amended 2022	% BUDGET USED	BUDGET		BUDGET
				Original 2023	Amendments	Amended 2023
6105-10 Chapel-Food	78.00	1,000.00		-		
6110-10 Chapel-Flowers/Candles/Liturgical item	-	800.00		-		
6504-10 Chapel-Supplies	-	600.00		-		
6650-10 Chapel-Stipends	600.00	2,000.00		-		
	<u>678.00</u>	<u>4,400.00</u>	15.41%	-		
6215-13 Communications-Outside Contract Services	14,187.25	35,000.00		35,000.00		35,000.00
6650-13 Communications-Stipends	-	30,000.00		1,800.00		1,800.00
6670-13 Communications-Computer expense	60.00	2,500.00		2,500.00		2,500.00
6733-13 Communications-Website	11,462.62	11,000.00		12,000.00		12,000.00
6832-13 Communications-Travel	394.22					
	<u>26,104.09</u>	<u>78,500.00</u>	33.25%	<u>51,300.00</u>	p.1 line 31	<u>51,300.00</u>
6105-14 Holy Synod-Food	326.13					
6504-14 Holy Synod-Supplies	227.18	1,000.00		1,000.00	-	1,000.00
6650-14 Holy Synod-Stipends	14,425.00	14,400.00		14,400.00	-	14,400.00
6832-14 Holy Synod-Travel	46,331.58	36,000.00		36,000.00	10,000.00	46,000.00
6834-14 Holy Synod-Meals	7,335.74	14,900.00		14,900.00	(4,900.00)	10,000.00
	<u>68,645.63</u>	<u>66,300.00</u>	103.54%	<u>66,300.00</u>	p.1 line 32	<u>71,400.00</u>
6051-15 Metropolitan's Office-Charity Distribution	5,000.00					
6092-15 Metropolitan's Office-Business Registration Fee:	-	1,900.00		-		
6105-15 Metropolitan's Office-Food	23.14					
6110-15 Metropolitan's Office-Flowers/Candles/Liturgic	1,025.00	-		-		
6280-15 Metropolitan's Office-Rent	23,800.00			40,800.00	[A]	40,800.00
6504-15 Metropolitan's Office-Supplies	847.30	3,500.00		750.00	-	750.00
6667-15 Metropolitan's Office-Chaplains - Stipends	5,725.00	6,000.00		12,000.00	(6,000.00)	6,000.00
6703-15 Metropolitan's Office-Water	484.61			2,100.00	[A]	2,100.00
6705-15 Metropolitan's Office-Electricity	495.02			1,440.00	[A]	1,440.00
6727-15 Metropolitan's Office-Internet	480.38			864.00	[A]	864.00
6750-15 Metropolitan's Office-Insurance	793.00			793.00	-	793.00
6831-15 Metropolitan's Office-Conference, Convention, M	-	1,000.00		-		
6832-15 Metropolitan's Office-Travel	36,446.22	47,000.00		47,000.00	(7,000.00)	40,000.00
6833-15 Metropolitan's Office-Lodging	305.10	-		-		
6834-15 Metropolitan's Office-Meals	138.99	6,000.00		6,000.00	(4,000.00)	2,000.00
6835-15 Metropolitan's Office-Moving Expense	-					
6900-15 Metropolitan's Office-Automobile	265.44			600.00	-	600.00
6902-15 Metropolitan's Office-Other Discretionary		3,000.00		3,000.00	-	3,000.00
	<u>75,829.20</u>	<u>68,400.00</u>	110.86%	<u>115,347.00</u>	p.1 line 33	<u>98,347.00</u>
6051-16 Metropolitan Council-Charity Distribution	7,590.00					
6105-16 Metropolitan Council-Food	512.03	2,400.00		-		
6211-16 Metropolitan Council-Accounting Fees	3,050.00					
6213-16 Metropolitan Council-Legal Fees	7,405.50					
6214-16 Metropolitan Council-Outside Contract Svcs	28,792.50					
6504-16 Metropolitan Council-Supplies	194.74	50.00		50.00		50.00
6832-16 Metropolitan Council-Travel	4,975.01	12,000.00		12,000.00		12,000.00
6833-16 Metropolitan Council-Lodging	12,129.95	18,000.00		18,000.00		18,000.00
6834-16 Metropolitan Council-Meals	1,055.18	-		2,400.00		2,400.00
	<u>65,704.91</u>	<u>32,450.00</u>	202.48%	<u>32,450.00</u>	p.1 line 34	<u>32,450.00</u>

[A] Metropolitan Housing in DC

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2023 Budget - Expenses by Department

		YTD Actual	BUDGET	% BUDGET	BUDGET		BUDGET
		9/30/2022	Amended 2022	USED	Original 2023	Amendments	Amended 2023
6017-17	St Catherine's Representa-Pension expense	10,866.24	5,310.00		10,941.12	1,367.60	12,308.72
6110-17	St Catherine's Representa-Flowers/Candles/Li	-	300.00		-		-
6650-17	St Catherine's Representa-Stipends	52,368.54	53,100.12		68,381.78	-	68,381.78
6832-17	St Catherine's Representa-Travel	2,806.35	15,000.00		12,000.00	(2,000.00)	10,000.00
		<u>66,041.13</u>	<u>73,710.12</u>	<u>89.60%</u>	<u>91,322.90</u>	<u>p.1 line 35</u>	<u>90,690.50</u>
6832-29	Theological Education Boa-Travel	-	10,000.00	0.00%	-	-	-
6050-30	Missions and Planting Gra-Distributions	55,999.86	68,000.00	82.35%	68,000.00	44,000.00	112,000.00
6215-34	Ordination Candidate Test-Outside Contract Se	-	12,000.00	0.00%	12,000.00	(6,000.00)	6,000.00
6050-40	Seminaries-Distributions	18,000.00	18,000.00	100.00%	18,000.00	p.1 line 38 p.1 line 41	18,000.00
6050-80	Ministries-Distributions	-	32,000.00		31,220.00	(31,220.00)	-
6092-80	Ministries-Business Registration Fees	-	-		-		-
6096-80	Ministries-Dues	1,400.00	-		1,400.00		1,400.00
6215-80	Ministries-Outside Contract Services	4,414.00	11,800.00		1,014.00		1,014.00
6253-80	Ministries-Program Supplies	1,536.60	-		-		-
6501-80	Ministries-Books, Subscriptions, Dues	513.30	-		-		-
6503-80	Ministries-Printing and Copying	398.88	1,500.00		501.00		501.00
6504-80	Ministries-Supplies	44.16	3,000.00		3,900.00		3,900.00
6515-80	Ministries-Memberships	-	12,000.00		-		-
6516-80	Ministries-Misc Other	4,189.13	-		-		-
6650-40	Ministries-Stipends (Clergy Synaxis)	-	-		36,000.00	(36,000.00)	-
6650-80	Ministries-Stipends	94,970.00	51,400.00		63,300.00		63,300.00
6733-80	Ministries-Website	550.00	1,500.00		1,830.00		1,830.00
6831-80	Ministries-Conference, Convention, Meeting	17,907.64	3,000.00		1,500.00		1,500.00
6832-80	Ministries-Travel	4,282.10	15,000.00		19,800.00	(4,800.00)	15,000.00
6833-80	Ministries-Lodging	-	-		-		-
6834-80	Ministries-Meals	-	-		-		-
6215-	Clergy Wives-Outside Contract Services	300.00	-		2,000.00	(2,000.00)	-
6502-	Clergy Wives-Postage, Mailing Service	1,017.79	-		2,500.00	(2,500.00)	-
6733-	Clergy Wives-Website	-	-		250.00	(250.00)	-
		<u>131,523.60</u>	<u>131,200.00</u>	<u>100.25%</u>	<u>165,215.00</u>	<u>p.1 line 42</u>	<u>88,445.00</u>
6050-40	OPL-Distributions	-	-		-	31,220.00	31,220.00
6215-40	Clergy Wives-Outside Contract Services	-	-		-	2,000.00	2,000.00
6502-40	Clergy Wives-Postage, Mailing Service	-	-		-	2,500.00	2,500.00
6733-40	Clergy Wives-Website	-	-		-	250.00	250.00
6650-40	OPL-Stipends (Clergy Synaxis)	-	-		-	36,000.00	36,000.00
6832-40	OPL-Travel	-	-		-	4,800.00	4,800.00
					<u>-</u>	<u>-</u>	<u>76,770.00</u>

## **Appendix A**

### **Orthodox Church in America**

#### Housing Allowances - 2023

Prior to the beginning of 2023, the OCA Treasurer solicited housing allowance requests from ordained clergy who are employees receiving a W2 from the central administration. As an officer of the OCA not eligible for housing designation, the Treasurer approved these requests as follows and asks the Metropolitan Council to ratify this approval with the adoption of the amended budget. Going forward, housing allowance designations will be explicitly included in the Metropolitan Council's budget discussion and approval in the fall of the preceding year (e.g., fall of 2023 for 2024 housing allowance designations).

Fr. Alexander Rental:

\$3,500 per month (\$42,000 per year)

Fr. Alessandro Margheritino

\$3,333.33 per month (\$40,000 per year)

Fr. John Mikitish

\$3,500 per month (\$42,000 per year)

Each of the above estimates are reasonable for rental/mortgage payments for recently-acquired homes in the D.C. area (\$3,000+ per month) and utilities (\$500 per month for electricity, gas, water, internet, etc.)



Investment Presentation for

2/28/2023

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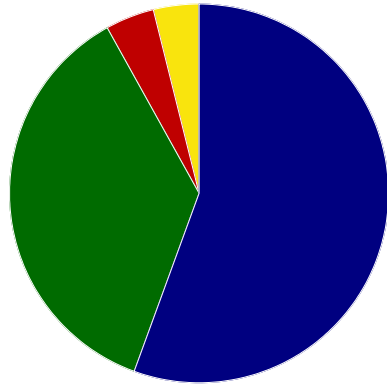
# **Orthodox Church**

Account AGG000098

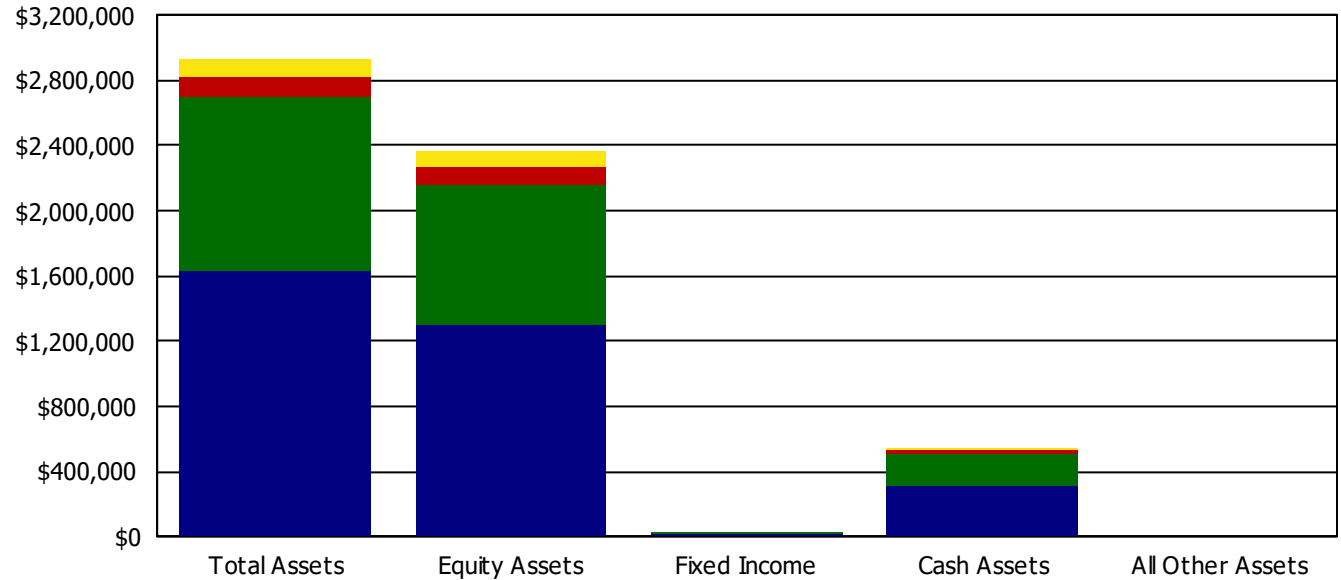
**Meeting Date: March 14, 2023**

<b>Report</b>	<b>Page</b>
Orthodox Church - Consolidated Account Summary. . . . .	1
Orthodox Church - Account Summary Report. . . . .	2
Orthodox Church - Equity Sector Weightings. . . . .	3
Orthodox Church - Holdings Detail. . . . .	4
Orthodox Church - Performance Summary. . . . .	7

Sub Account Allocation



Sub-Account Allocation Across Asset Classes



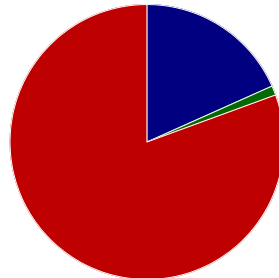
Sub-Account Allocation

Sub-Account	% Total	Total Assets	Equity Assets	Fixed Income	Cash Assets	All Other Assets
Orthodox Church - Main Endowment (PT***4)	55.52	1,629,205.74	1,306,896.60 80.22%	13,100.00 0.80%	309,209.14 18.98%	0.00 0.00%
Orthodox Church - Mission Endowment (PT***7)	36.39	1,067,806.25	856,179.72 80.18%	13,100.00 1.23%	198,526.53 18.59%	0.00 0.00%
Orthodox Church - St. Andrews (PT***5)	4.31	126,607.54	107,179.78 84.66%	2,620.00 2.07%	16,807.76 13.28%	0.00 0.00%
Orthodox Church - Fos Endowment (PT***6)	3.78	111,005.17	93,594.03 84.32%	1,310.00 1.18%	16,101.14 14.50%	0.00 0.00%
<b>Total</b>	<b>100.00%</b>	<b>\$2,934,624.70</b>	<b>\$2,363,850.13</b>	<b>\$30,130.00</b>	<b>\$540,644.57</b>	<b>\$0.00</b>
<b>Percentage of Holdings</b>			<b>80.55%</b>	<b>1.03%</b>	<b>18.42%</b>	<b>0.00%</b>

\* Assets not designated as equity, fixed or cash are totaled in other assets; Market values include accruals.

Asset Allocation

Asset Category	Market Value	% Total
Cash & Equivalents	540,644.57	18.4
Fixed Income	30,130.00	1.0
Equity	2,363,850.13	80.6
<b>Total</b>	<b>\$2,934,624.70</b>	<b>100.0%</b>



Account Statistics

Total Market Value	\$2,934,624.70
Total Unrealized Gain/Loss	\$527,636.94
Estimated Annual Income	\$80,999.97
Estimated Portfolio Yield	2.76%
YTD Long Term Gain/Loss	\$15,541.00
YTD Short Term Gain/Loss	\$0.00

Top 10 Holdings

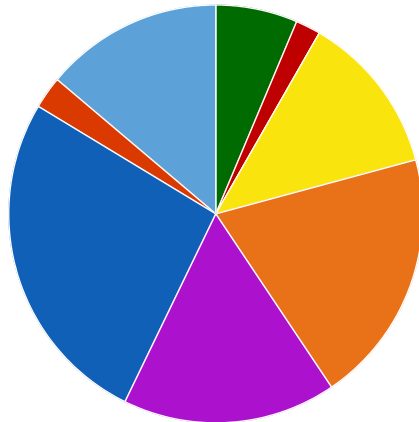
Asset	Units	Price	Tax Cost	Market Value	Gain/Loss	Est. Income	Yield	% Total
SEI DAILY INC TREAS II PT-F	538,830	1.00	538,830.00	540,644.57	1,814.57	23,708.52	4.39	18.42
Income Cash	324,635	1.00	324,635.21	324,635.21	0.00	0.00	0.00	11.06
MICROSOFT CORP	755	249.42	53,139.98	188,825.50	135,685.52	2,053.60	1.09	6.43
APPLE INC	1,240	147.41	33,871.61	182,788.40	148,916.79	1,140.80	0.62	6.23
ABBOTT LABS INC	1,125	101.72	50,855.43	114,435.00	63,579.57	2,295.00	2.01	3.90
RAYTHEON TECHNOLOGIES CORP	1,100	98.09	77,954.08	108,504.00	30,549.92	2,420.00	2.23	3.70
ALPHABET INC CL A	1,145	90.06	45,749.57	103,118.70	57,369.13	0.00	0.00	3.51
ABBVIE INC	600	153.90	56,462.76	92,340.00	35,877.24	3,552.00	3.85	3.15
NVIDIA CORP	385	232.16	54,043.03	89,381.60	35,338.57	61.60	0.07	3.05
GOLDMAN SACHS GROUP INC	250	351.65	82,643.13	87,912.50	5,269.37	2,500.00	2.84	3.00
<b>Total</b>			<b>\$1,318,184.80</b>	<b>\$1,832,585.48</b>	<b>\$514,400.68</b>	<b>\$37,731.52</b>	<b>2.06%</b>	<b>62.45%</b>

Market values include accruals.

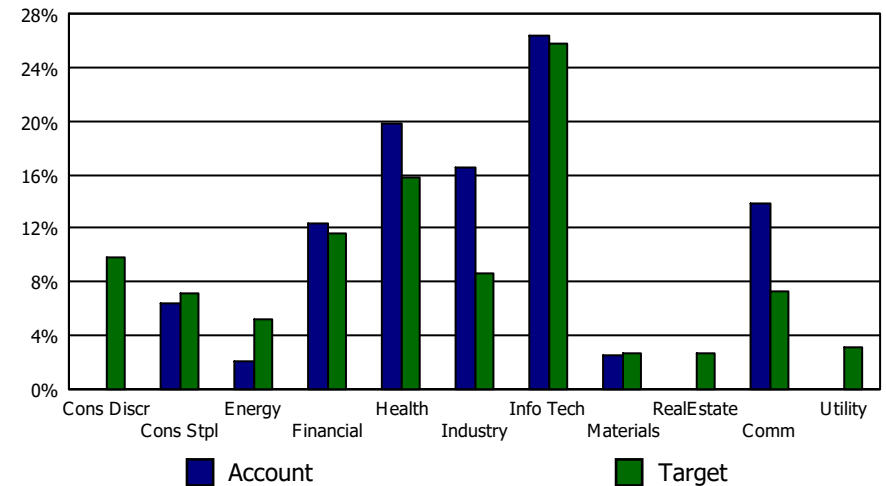
## Equity Sector Weightings as of 2/28/2023

Orthodox Church

### Sector Allocation



### Allocation Comparison



### Equity Sector Detail

Equity Category	Market Value	Units	% Total	% Comp	Var %
Consumer Discretionary	0.00	0	0	10	-10
Consumer Staples	146,595.96	6,830	6	7	-1
Energy	47,692.70	3,820	2	5	-3
Financials	286,626.00	18,210	12	12	1
Health Care	456,877.75	9,400	20	16	4
Industrials	383,711.22	19,636	17	9	8
Information Technology	611,179.25	8,510	26	26	1
Materials	59,926.50	2,070	3	3	0
Real Estate	0.00	0	0	3	-3
Communication Services	321,940.75	13,880	14	7	7
Utilities	0.00	0	0	3	-3
<b>Total</b>	<b>\$2,314,550.13</b>		<b>100%</b>	<b>100%</b>	

\* Comparison Account: S&P 500; Market values include accruals.

Asset	Quantity	Price	Market Value	% Total	Tax Cost	Gain/Loss
<b>Cash &amp; Equivalents</b>						
<b>Cash &amp; Equivalents</b>						
SEI Daily Inc Treas II Pt-f	538,830	1.00	540,644.57	18	538,830.00	1,814.57
<b>Total Cash &amp; Equivalents</b>			<b>\$540,644.57</b>	<b>18%</b>	<b>\$538,830.00</b>	<b>\$1,814.57</b>
<b>Uninvested Cash</b>						
Income Cash	324,635	1.00	324,635.21	11	324,635.21	0.00
Principal Cash	-324,635	1.00	-324,635.21	-11	-324,635.21	0.00
<b>Total Uninvested Cash</b>			<b>\$0.00</b>	<b>0%</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Cash &amp; Equivalents</b>			<b>\$540,644.57</b>	<b>18%</b>	<b>\$538,830.00</b>	<b>\$1,814.57</b>
<b>Fixed Income</b>						
<b>Closed End Fixed Income</b>						
Hancock John Invs TR SH Ben Int	2,300	13.10	30,130.00	1	40,433.77	-10,303.77
<b>Total Closed End Fixed Income</b>			<b>\$30,130.00</b>	<b>1%</b>	<b>\$40,433.77</b>	<b>\$-10,303.77</b>
<b>Total Fixed Income</b>			<b>\$30,130.00</b>	<b>1%</b>	<b>\$40,433.77</b>	<b>\$-10,303.77</b>
<b>Equity</b>						
<b>Consumer Staples</b>						
Kraft Heinz CO	2,225	38.94	86,641.50	3	97,861.19	-11,219.69
Unilever PLC	1,190	49.93	59,954.46	2	61,442.80	-1,488.34
<b>Total Consumer Staples</b>			<b>\$146,595.96</b>	<b>5%</b>	<b>\$159,303.99</b>	<b>\$-12,708.03</b>
<b>Energy</b>						
Coterra Energy Inc	1,910	24.97	47,692.70	2	60,145.90	-12,453.20
<b>Total Energy</b>			<b>\$47,692.70</b>	<b>2%</b>	<b>\$60,145.90</b>	<b>\$-12,453.20</b>
<b>Financials</b>						
Berkshire Hathaway INC-CL B	275	305.18	83,924.50	3	55,314.64	28,609.86
Donegal Group Inc CL A	2,800	15.37	43,036.00	1	42,441.46	594.54
Goldman Sachs Group Inc	250	351.65	87,912.50	3	82,643.13	5,269.37

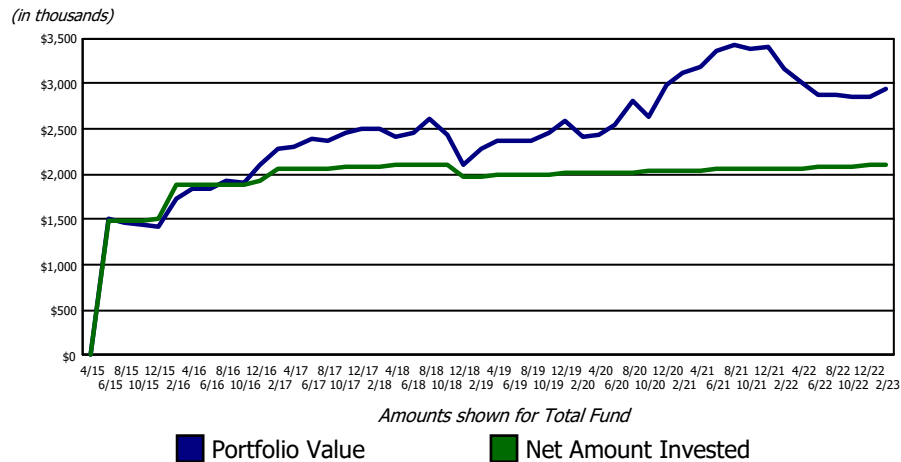
Asset	Quantity	Price	Market Value	% Total	Tax Cost	Gain/Loss
<b>Equity</b>						
<b>Financials (continued)</b>						
Peapack-gladstone Finl Corp	1,100	37.15	40,865.00	1	29,911.65	10,953.35
Sofi Technologies Inc	4,680	6.60	30,888.00	1	74,244.65	-43,356.65
<b>Total Financials</b>			<b>\$286,626.00</b>	<b>10%</b>	<b>\$284,555.53</b>	<b>\$2,070.47</b>
<b>Health Care</b>						
Abbott Labs Inc	1,125	101.72	114,435.00	4	50,855.43	63,579.57
Abbvie Inc	600	153.90	92,340.00	3	56,462.76	35,877.24
Gilead Sciences Inc Com	995	80.53	80,127.35	3	68,282.07	11,845.28
Iqvia Holdings Inc	420	208.47	87,557.40	3	49,933.02	37,624.38
Medtronic PLC	560	82.80	46,368.00	2	49,609.73	-3,241.73
Royalty Pharma PLC CL A	1,000	35.85	36,050.00	1	38,773.30	-2,723.30
<b>Total Health Care</b>			<b>\$456,877.75</b>	<b>16%</b>	<b>\$313,916.31</b>	<b>\$142,961.44</b>
<b>Industrials</b>						
Bwx Technologies Inc	500	61.11	30,555.00	1	28,831.95	1,723.05
Honeywell International Inc	275	191.48	52,940.25	2	49,796.60	3,143.65
L3 Harris Technologies Inc	363	211.19	76,661.97	3	30,342.60	46,319.37
Leonardo Drs Inc	2,500	13.00	32,500.00	1	33,012.25	-512.25
Raytheon Technologies Corp	1,100	98.09	108,504.00	4	77,954.08	30,549.92
Vertiv Holdings LLC CL A	5,080	16.25	82,550.00	3	66,123.31	16,426.69
<b>Total Industrials</b>			<b>\$383,711.22</b>	<b>13%</b>	<b>\$286,060.79</b>	<b>\$97,650.43</b>
<b>Information Technology</b>						
Adobe Inc	65	323.95	21,056.75	1	31,829.70	-10,772.95
Apple Inc	1,240	147.41	182,788.40	6	33,871.61	148,916.79
Coherent Corp	1,000	43.13	43,130.00	1	36,587.10	6,542.90
IBM Corporation	460	129.30	60,237.00	2	60,528.09	-291.09
Microsoft Corp	755	249.42	188,825.50	6	53,139.98	135,685.52
NVIDIA Corp	385	232.16	89,381.60	3	54,043.03	35,338.57

<b>Asset</b>	<b>Quantity</b>	<b>Price</b>	<b>Market Value</b>	<b>% Total</b>	<b>Tax Cost</b>	<b>Gain/Loss</b>
<b>Equity</b>						
<b>Information Technology (continued)</b>						
Paypal Holdings Inc	350	73.60	25,760.00	1	67,596.30	-41,836.30
<b>Total Information Technology</b>			<b>\$611,179.25</b>	<b>21%</b>	<b>\$337,595.81</b>	<b>\$273,583.44</b>
<b>Materials</b>						
Dow Inc	1,035	57.20	59,926.50	2	62,669.97	-2,743.47
<b>Total Materials</b>			<b>\$59,926.50</b>	<b>2%</b>	<b>\$62,669.97</b>	<b>\$-2,743.47</b>
<b>Communication Services</b>						
Activision Blizzard, Inc	875	76.25	66,718.75	2	48,220.10	18,498.65
Alphabet Inc CL A	1,145	90.06	103,118.70	4	45,749.57	57,369.13
AT&T Inc	2,805	18.91	53,042.55	2	57,848.08	-4,805.53
Take-two Interactive Software Inc	240	109.55	26,292.00	1	32,381.41	-6,089.41
Verizon Communications	1,875	38.81	72,768.75	2	92,977.84	-20,209.09
<b>Total Communication Services</b>			<b>\$321,940.75</b>	<b>11%</b>	<b>\$277,177.00</b>	<b>\$44,763.75</b>
<b>Domestic Equity Mutual Funds</b>						
Gabelli Equity TR Inc	8,500	5.80	49,300.00	2	46,298.69	3,001.31
<b>Total Domestic Equity Mutual Funds</b>			<b>\$49,300.00</b>	<b>2%</b>	<b>\$46,298.69</b>	<b>\$3,001.31</b>
<b>Total Equity</b>			<b>\$2,363,850.13</b>	<b>81%</b>	<b>\$1,827,723.99</b>	<b>\$536,126.14</b>
<b>Total Portfolio</b>			<b>\$2,934,624.70</b>	<b>100%</b>	<b>\$2,406,987.76</b>	<b>\$527,636.94</b>

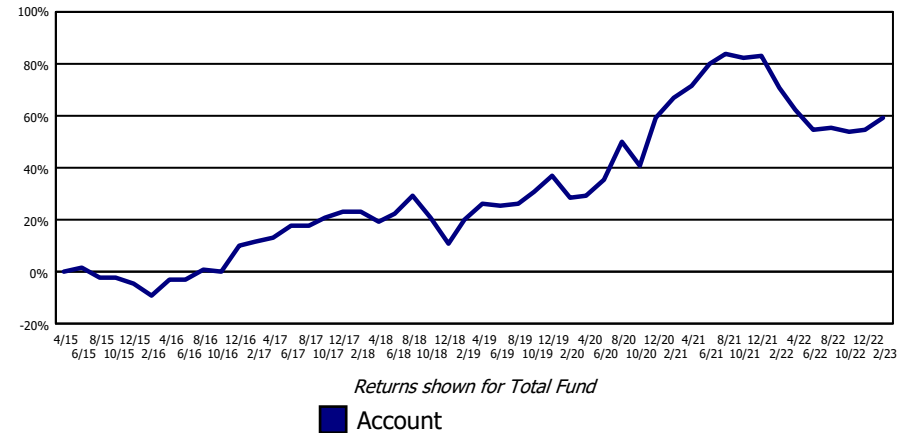
\* Market values include accruals.



Portfolio Growth Since Inception



Cumulative Returns



Return Details

	YTD	2022	Since Inception
Total Fund	3.04%	-15.54%	58.85%
Equity	3.69%	-18.29%	85.22%
Benchmark - S&P 500	3.69%	-18.11%	120.73%
Fixed Income	4.47%	-29.36%	9.92%
Benchmark - Barcap 1-3 Yr Govt/cred	0.05%	-3.69%	6.97%
Short Term Cash	0.66%	1.35%	6.59%

\* The Inception Date for Total Fund is 5/1/2015; Market values include accruals.



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February 13, 2023

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

We submit this Pension Plan report and attached documents to the Metropolitan Council. This report addresses the activity occurring from our last report dated October 19, 2022.

The trustees met in person in New York for a board meeting on December 15, 2022. We were joined by our newly appointed Episcopal Moderator, His Eminence Archbishop Daniel, Archbishop of Chicago and the Diocese of the Midwest. Metropolitan Council liaison David Lane was also present, except for the executive session of the meeting which dealt with Pension Plan participant benefit issues.

The mandate of the 4<sup>th</sup> AAC for Pension Plan participation, and as per the Pension Plan document, is the beginning fact for any discussion and all work by the Pension Board and all pension committees. Our goal has been and continues to be addressing enforcement of the mandate.

All eligible clergy are required to contribute to the Pension Plan (“the Plan”) on all compensation received from all services rendered to the OCA and its parishes. This includes all eligible clergy assigned to a parish (e.g., associate priest, assigned deacon, etc.) Also, there is no exclusion of second or third sources of OCA income (e.g., chancellor’s or dean’s stipend in addition to parish priest’s stipend.) There is no *de minimis* income amount a clergy receives which is exempt.

Eligible *non*-clergy who perform services for an OCA parish and or institution on a full-time basis and receive compensation are also mandated to participate. A full-time employee is defined as one who *customarily* performs services for an OCA parish and or institution for at least 20 hours per week (e.g., choir director, administrative assistant, professor, etc.)

Additionally, all parishes are required to participate based on their clergy compensation, ***whether or not their clergy are members of the Plan or eligible to participate in the Plan.***

***Also, for any clergy who are not compensated or a Parish without clergy, the Parish is obligated to contribute to the Plan.*** In line with these requirements, the OCA Pension Plan will begin sending remittance advices to facilitate payments by these parishes.

### Participation:

This is the current participant count:

- 346 active participating members
  - this includes 19 clergy with more than one assignment and who are contributing on **all** their sources of OCA income;
- 33 inactive members
- 379 total active/inactive participants.
  
- 234 monthly benefits recipients
  - This is the number of checks paid, not the number of deceased members; e.g., a member names four 25% beneficiaries of his benefit = 4 recipients.

### Actuarial Services:

The Pension Board actuarial committee was comprised of trustees Archpriest John Dresko, Mrs. Melanie Ringa, and Plan administrator Michael Stieglitz. Requests for Proposals (RFPs) were emailed to 14 firms. Three firms excused themselves as they do not provide actuarial services to church pension plans. The remaining 11 firms submitted detailed proposals.

The committee reviewed each proposal as a team. They selected firms with the best fit and held virtual meetings with these 6 firms. After the virtual meetings and further discussion, the committee presented 2 final firms for consideration to the full Board. The Board selected Gabriel, Roeder, Smith & Company (GRS) <https://www.grsconsulting.com> to be the Plan's new actuarial consultant. A copy of the January 12, 2023 news release announcing the selection is attached to this report.

**It should be noted that ALL 6 firms that were interviewed stated that they would NOT consider “freezing” the current plan or making significant plan changes until the plan was in a healthier, better funded status. ALL 6 firms further noted that compliance of current Plan rules, such as mandatory participation by both the member and the employer and contributing the required contributions, are key factors to bring the Pension Plan to better health.**

### Communication to Members:

In December, a memo was sent to all members of the Plan and the entire OCA community summarizing our activity since the AAC in Baltimore. A copy of the December 9, 2022 email communication is attached to this report.

**Administration:**

The online MARC system has been updated for the new employer contribution rates effective January 1, 2023.

The Pension Office has reminded participants that both the member and the employer contributions must be received for a given month before they can be accepted and processed.

The Pension Office has requested that one monthly check be submitted per employer for the total of all employer's and members' contributions for that month. This will provide better bookkeeping for both the parishes and the Plan. If an employer cannot submit one monthly payment, the Pension Office requests that both the employer and the employee payments be sent at the same time or scheduled to be delivered at the same time. This will prevent the Pension Office from holding up the processing of partial contribution payments.

As a reminder, the Pension Office number has text messaging capabilities. Any member can text the office or text the Pension Administrator Michael S. Stieglitz directly at 516-464-0415.

**Investment Performance as of December 31, 2022:**

Comments from our Morgan Stanley investment advisors: Volatility continued for the 4<sup>th</sup> quarter of 2022 yet resulted in net positive gains for the Trust's stock and bond portfolios. Markets rallied for first two months of the quarter and then declined for much of December. The full year however resulted in significant negative returns in stock and bond markets here and abroad as central banks around the world continued to tighten financial conditions in an effort to bring down globally high inflation rates as we commented on last quarter. It was the first time that both U.S. stock and bond markets were both down over 10% in the same year since the 1800's.

The net time-weighted return on core investments managed by Morgan Stanley year-to-date was -16.69% compared to our assumed annual actuarial rate of 7% and benchmark of -14.19%. The net time-weighted annualized return for the 5-year period December 31, 2017 to December 31, 2022 on investments managed by Morgan Stanley was 2.89% compared to our benchmark of 3.63%.

The ending fair market value (FMV) of plan assets on December 31, 2022 was \$22,424,960. This is comprised of \$22,028,533 held at Morgan Stanley and \$396,427 held at TD Bank. The FMV of the alternative investments included in the Morgan Stanley figure has not yet been updated for their December 31, 2022 valuations. The Plan's audited financial statements reported total net plan assets of \$28,976,787 on December 31, 2021.

Obviously, the 2022 investment performance is disappointing. Pension assets are not immune to the effects of the markets. We will continue to focus on and improve the variables which we can control.

**Additional information provided:**

We have provided the following reports and information as referenced within this report:

- A. January 12, 2023 memo announcing engagement of new actuarial consultant.
- B. December 9, 2022 status update email communication

**Specific requests for the Metropolitan Council:**

The Pension Board is not submitting any amendments to the Plan or any requests to be considered at this time.

**Conclusion**

We continue our efforts for the benefit of those who have labored in the Lord's vineyard. Working together and focused on this one purpose as our goal, we can and will strengthen the financial health of the plan and serve the Retirees and Members.

May God continue to bless us with health and peace as we begin Great Lent.

Respectfully yours in Christ,  
The Pension Board

His Eminence Archbishop Daniel, Episcopal Moderator  
Matushka Mary Buletza Breton, Chair  
Archpriest John Dresko  
Archpriest Matthew Tate  
Archpriest Chad Hatfield  
Ms. Mary Ann Bobulsky  
Mrs. Melanie Ringa



**Pension Office**

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To: Metropolitan Council and Central Administration  
Cc: OCA Community  
From: OCA Pension Plan Board  
Date: January 12, 2023  
Subject: New Actuarial Consultant for the OCA Pension Plan

Glory to Jesus Christ!

Effective January 1, 2023, the OCA Pension Plan has engaged the firm of Gabriel, Roeder, Smith & Company (GRS) to be the new actuarial consultants for OCA Pension Plan. This change will not have any impact regarding the online MARC system; parishes and members will continue to be able to access and use this portal.

Here is some background about GRS and the team which will be working on our account. GRS has been providing actuarial and consulting services for more than 80 years. With over 1,000 clients, they provide actuarial and benefits consulting services to more benefit plans than any other firm in the country. They serve over 25 church plans on a retainer basis and many more on special projects related to benefit adequacy and design. GRS core retainer services for church plans include actuarial, benefit design, and defined benefit plan administration. GRS only provides actuarial consulting services to defined benefit plans. It is also worth noting that GRS has been serving non-ERISA church plans for more than 40 years.

The three-member team who has been assigned to our account consists of three high level actuaries who specialize in church retirement plan actuarial and administrative consulting.

GRS has researched retirement issues for priests in depth, has developed many articles and has presented to many church pension plans such as ours that are facing the same obstacles we are facing. We will be glad to share with you some of the articles that they have written.

The Pension Board believes that GRS will assist us and provide guidance to improve the funding of the Pension Plan once GRS finishes its onboarding process.

Members of the OCA Pension Plan

January 12, 2023

Page 2 of 2

Please note that the full actuarial valuation as of January 1, 2023 will not be completed until late summer or early fall of 2023. Due to this timing, GRS may have minimal substantial to report before the valuation is completed.

If you have any questions, please call our Plan Administrator Michael S. Stieglitz at 516-464-0415 or email Michael at [michael@ocapension.org](mailto:michael@ocapension.org).

With love in Christ,  
The Pension Board

His Eminence Archbishop Daniel, Episcopal Moderator  
Matushka Mary Buletza Breton, Chair  
Fr. John Dresko  
Fr. Chad Hatfield  
Fr. Matthew Tate  
Ms. Mary Ann Bobulsky  
Mrs. Melanie Ringa

**Report of the Departments**  
Orthodox Church in America  
March 3, 2023

Below is a summary of the ongoing work or status of each department since the last report of October, 2022.

**Website Refresh Project**

Work is underway to refresh each department's web presence on oca.org. Each department will be assigned a subdomain (e.g., music.oca.org, etc) and will use a consistent OCA branding and template which will be commensurate with the number of resources that a particular department offers. At this time, the Department of Liturgical Music has a vast number of files, easily surpassing 5,000, that will have to be tagged and organized in order for users to more easily find the music and texts they seek. The second largest collection is the Department of Christian Education.

**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 Ochtoechos 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 third round for this popular program.*)
- **ONGOING:** Basic Conducting Course held online. This course was recently updated with new videos.
- **NEW:** New musical settings for various services in the Tridion period.

**Department of Evangelization**



- **COMPLETED:** First-year Matching Mission Planting Grants were awarded to two mission parishes after reviewing three applications. Additionally, two third-year grants were awarded.
- **PENDING:** A new apologetics website (currently being named logikos.org) that will feature articles mainly by OCA priests and informed OCA laypersons. The purpose of this site is to provide reliable, well-researched materials on a variety of subjects that are currently being addressed online, sometimes by unreliable or questionable persons or sources. This site would be in answer to the growing number of independent voices on the internet which are causing confusion and even rebellion among some.

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

- Three meetings were held with youth leaders and representatives from across the OCA about the vision for a national Youth Director and the larger vision for youth work across the OCA. From this work, a search for a part-time (15-20 hours per week) Youth Director is now being undertaken. The position will coordinate OCA Youth and Young Adult Ministry efforts including the dissemination of information regarding active ministries and camps across America, the development of helpful resources for parishes, the coordination and cooperation with other Youth Directors from across the OCA, cooperative efforts with the FOCA, as well as other jurisdictions and the Assembly of Bishops.

### **Department of Christian Education**

- **COMPLETE:** Development of new six-lesson FOCUS units on the post-Resurrection/Acts of the Apostles work of the church.
- **COMPLETE:** Development of new Vacation Church School units that can also be used as stand-alone lessons.
- **UDNER DEVELOPMENT:** A comprehensive (approximately 24 week) Church School curriculum coordinated with the Inter-Departmental

### **Department of Continuing Education**

- *Function to be joined to the Office of Pastoral Life.*

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

- Need for re-envisioning of departmental work.

## **Inter-Departmental “Essential Orthodox Christian Beliefs: A Manual for Adult Instruction” (was Catechism)**

- **TEXT UNDER REVIEW BY HIS BEATITUDE** and then to be presented to the Holy Synod: A 16-chapter/session Adult manual written collaboratively by outstanding authors and made freely available for parish use, including a teacher and learner manual, and a resource site to accompany the course. To be released by Pentecost 2023.

### **Proposed**

- **Multi-day National Parish Ministries Workshops** to be held in Summer of 2024 equipping the faithful to learn from recognized leaders and share their own experiences and ideas in the areas of Liturgical Music, Christian Education, Missions and Evangelism, Youth and Young-Adult Ministry, and Christian Service.

Archpriest Thomas Soroka  
Project Manager

# **Office of Pastoral Life**

## **Metropolitan Council Report**

### **March, 2023**

The Office of Pastoral Life is focused on 4 main program initiatives with two other program initiatives possibly developing.

#### **Synaxis Program**

Four Synaxis events were held in 2022. Over 150 parish priests and deacons participated in the Synaxis program over the year with varying levels of involvement. Cumulatively, 264 total registrations occurred during the year averaging 66 in attendance per event. Over the course of a 2-year period, the highest registrants were those in parish ministry for a period of 0-15 years. That number is 104. Mid-career with 16-29 years of parish ministry experience was 70 and those with 30 plus years was 82. Quarterly Synaxis events will continue in 2023.

#### **Thriving in Ministry**

The Thriving in Ministry Program (TiM) completed a period of reflection that was funded by a small grant from Leadership Education. Activities in this reflective period involved a combined TiM Board meeting with the central Church administration, a workshop gathering of TiM participants (both clergy and clergy wives) with a Marketing/Communication professional, and professional coaching for the TiM administration. Takeaways from this reflective time highlighted the need for TiM to strengthen program evaluation activities and work toward cultivating donors for long-term sustainability. The Sustainability Grant (due March 15<sup>th</sup>) is a matching grant of up to \$500,000. TiM intends to apply for the full \$500,000.

#### **National Clergy In-Person Synaxis**

The Office is actively planning the In-Person National Retreat of active priests, retired priests, and hierarchs for October 17<sup>th</sup> – 20<sup>th</sup>, 2023 at the University of Saint Mary of the Lake Conference Center - 1000 E Maple Ave, Mundelein, IL. It is anticipated the cost of the In-Person Synaxis will range between \$1,100 - \$2,000 per participant for travel and registration. Parishes will be expected to budget and cover the cost for participant's expenses. The guest speaker, Father Maximos Constas, has been confirmed. Various press releases and information videos have been shared out with the clergy ranks. The central Church will cover the cost of the guest speaker stipend & travel and miscellaneous retreat expenses.

#### **Clergy Wives**

The Clergy Wives Advisory Group (CWAG) offers quarterly online retreats. Their last retreat was on Feb. 4th, on the topic of "Lenten Nutrition" with a panel of four speakers: Catherine Mandell, Mka. Melissa Naasko, Mka. Krista Fedorchak, and Pres. Lisa Goussetis. CWAG also recently published an online quarterly newsletter on Feb. 21st, which included an article from Mother Christophora when she spoke to Alaskan clergy wives and an article by Mka. Natalia Wooten about her visit to the Diocese of Mexico along with the Metropolitan. With the help of Fr. David Wooten, CWAG translated into Spanish and printed 30 copies of their 8-card Clergy Wives Prayer Card sets for the Wooten's to hand-deliver to the clergy wives in Mexico. CWAG will hold their first Clergy Widows online retreat on April 22nd, from 1-3pm EST; the clergy widows requested their guest speaker to be Bishop John Abdallah. CWAG is planning an in-person leadership retreat for the Advisory Group to train and teach their Diocesan Point People (DPP) this summer.

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**Two other OPL initiatives are being considered.**

**Parent/Child Grant Initiative**

The Office recently applied for a \$1,250,000 grant from the Lilly Endowment for their Christian Parenting and Caregiver Initiative. Our proposal seeks to support clergy families by identifying, developing, and providing resources and programs which effectively support Orthodox Christian faith and practice in the context of clergy family life. Should we receive the grant, we plan to seek out adult children of clergy and clergy parents and learn from their experiences. Then, we will develop a program aimed at fostering within our clergy families the understanding and best practices that encourage lifelong faith and address (and avoid) trauma in their children. This will involve national retreats and the establishment of local clergy family networks. We also believe that the learning and understanding gained in this program will be easily transferrable to lay families in parish life.

**Compelling Preaching Grant Initiative**

The Office is considering applying for another Lilly Endowment Grant titled – Compelling Preaching Grant Initiative. This grant, should we pursue it, is due May 15<sup>th</sup>.

In Christ,  
Father Nicholas J Solak

March 3, 2023.

Your Beatitude and esteemed members of Metropolitan Council,

Most blessed master, bless!

The online communication outlets of the Orthodox Church in America have seen steady growth and improvement. We continue to have a regular presence on social media with daily posts on Facebook, Twitter, and Instagram highlighting the saints of the day, in addition to various anniversaries, news items, and other posts of interest. We average 3 posts per day.

In the past three months we saw the following metrics:

Facebook: Engagements: 5.3k. Followers: 43k. Average new followers per day: 36.

Twitter: Engagements: 1.1k. Followers: 4.3k. Average new followers per day: 311.

Instagram: Engagements: 5.3k. Followers: 7.9k. Average new followers per day: 189.

The numbers show numerical growth but at a slower rate. Each social media platform rewards and penalizes different strategies with their respective algorithms. These algorithms also change without notice. For instance, Instagram recently updated their 2023 algorithm so only 10% of followers can see a user's posts. We will continue to evaluate and compensate for ongoing changes.

The oca.org website saw the following changes in the past three months:

Users: 396k (up 19.9%), Sessions: 880k (up 10.2%), average length of time: 2m 55s.

Our top website and social media posts have included Your Beatitude's trip to Rome for the Papal funeral, the video of the prayer service from the March for Life, the consecration anniversaries of the members of the Holy Synod, Your Beatitude's letter for Lent 2023, the recent release of updated clergy guidelines, and various In Memoriam posts. Other notable communications events include the inaugural Church Musician Sunday and the collection for the Diocese of Alaska as announced in July at the All-American Council.

Since the last report, the main focus of attention has been proceeding with a website revision. The decision was made early on that the website is not focused enough and that the OCA Departments ought to have their own subdomains to showcase their work which, in turn, would be highlighted as OCA news.

First steps have been cleaning up outdated sections of the website, consolidating duplicate items, and gentle reorganization. For example, feedback from social media indicated the OCA website was a depressing experience for users when obituaries clustered together and crowded out the other news items. To compensate for this, we now feature a permanent In Memoriam section so that we might properly honor our clergy and matushki while not leaving users with a negative website experience.

The Web Content Manager and I have spent several days updating and replacing dated photos. This will be a long-running project as the website contains over 10,000 individual images and icons.

Pending finalization and approval, more reorganization will be coming in the coming weeks, notably a separate “News and Media” section, introduction of user-focused sections, and consolidation of menu items for easier navigation. Some resources are in a holding pattern until the Department subdomains are in place and decisions can be made vis-à-vis their organization.

Even with updating the current website, eventually a larger redesign will be necessary. Fortunately, our technical needs are not overwhelming and I do not foresee this as a monumental, expensive task. In 2023, I hope to work with Your Beatitude, the Chancellor, Secretary, and Chancery staff to set out a concrete vision for wider OCA communications process so that the form of a redesigned website supports our wider social media presence and other focused goals.

Thank you for your continued support.

Yours in Christ,

Priest Kyle Parrott

# Metropolitan Council

*As of February 23, 2023*

His Beatitude Metropolitan Tikhon  
*Archbishop of Washington and Metropolitan of All America and Canada*  
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## Members elected by All-American Council

### Members elected at the 20<sup>th</sup> AAC

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