



**ORTHODOX  
CHURCH in  
AMERICA**

**Metropolitan Council Meeting**

**Fall 2018**

**Reports**



## Meeting of the Metropolitan Council September 19 to September 21, 2018 Reports

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**Meeting of the Metropolitan Council  
September 19 to September 21, 2018**

**Metropolitan Council Agenda**

All housing, meals and meeting are at Seminary of the Immaculate Conception located at 440 W. Neck Road, Huntington, NY 11743 (about 15 minutes east of the Chancery) Phone: (631)423-0483.

**Tuesday, September 18**

***Arrival and Committees***

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
All Day	Transport	Airports	Chancery Staff

Dinner will be available at 5:30 PM at the Seminary

*If any committees would like to meet this evening, they are free to schedule it themselves*

**Wednesday, September 19**

***Metropolitan Council***

<i>Time</i>	<i>Event</i>	<i>Location</i>	<i>Responsibility</i>
8:00 AM	Divine Liturgy	Chancery	Metropolitan
9:30 AM	Breakfast	Chancery	Chancery Staff
11:00 AM	Metropolitan Council		
	A. Agenda: Introduction		Fr. John Jillions
	B. Roll Call/Approval of Minutes		Fr. Eric G. Tosi
	C. Welcome - New Members		Metropolitan Tikhon
	E. Metropolitan's Report - 4 Pillars Discussion - Transition Committee		Metropolitan Tikhon
12:30 PM	Lunch	IMC	IMC
1:30 PM	F. Chancellor's Report - ORSMA - SMPAC		Fr. John Jillions
	G. Secretary's Report - Post AAC Report		Fr Eric G. Tosi

		- Social Media Policy - Archives Report - IT Report - Communications/website redesign Report	Alex Liberovsky
	H.	Legal Report - Ongoing Legal Issues	E.R. Lanier
5:30 PM	Dinner	IMC	IMC
7:00 PM	New Member Orientation		E.R. Lanier
<b>Thursday, September 20</b>			
<b><i>Metropolitan Council</i></b>			
8:00 AM	Breakfast	IMC	IMC
9:00 AM	Metropolitan Council		IMC
	I.	Stewards of the OCA Report	ADN Joseph
	J.	Metropolitan Council Committees	
	1.	MC Committee Reorganization	Metropolitan Tikhon
	2.	Report of Charity Committee	Fr. Alexander Kuchta
	3.	Report of Ethics Committee	Fr. Thomas Moore
	4.	Report of Human Resources - Update of HR Handbook - Status of Job Descriptions	Lisa Mikhalevsky
	5.	Report of Internal Governance	?
	6.	50 <sup>th</sup> Anniversary Committee	
12:30 PM	Lunch	IMC	IMC
1:30 PM	Metropolitan Council		IMC
	K.	Treasurer's Report - Finance Update - External Auditor Recommendations - Internal Auditor Recommendation - Presentation of 2018 Budget	Melanie Ringa
	L.	Report of Finance/Investment Committee -OCCIF	Fr. John Dresko
	M.	Planting Grant Requests	

	N.	External Affairs		Fr. Leonid Kishkovsky
4:00 PM	O.	Open Discussion - Operation of the MC/Retreats		Metropolitan Tikhon
5:30 PM	Dinner	IMC		IMC
7:00 PM	P.	Standing Synod/Committee Meetings		IMC

**Friday, September 21  
Metropolitan Council**

8:00 AM	Breakfast	IMC		IMC
9:00 AM	Metropolitan Council	IMC		
	Q.	Pension Plan Report		Mary Buletza
	R.	Department Report Youth Director Position/AAC		
	S.	Strategic Planning Session - Prioritizing major goals and processes		Metropolitan Tikhon
	T.	Other Business/Committee Meeting Issues		
	U.	Next Meeting and Dates for 2019		
12:30 PM	Lunch	IMC		IMC

Departures

*Transportation to the airports all day. For those staying for the St. Sergius celebration, they will be moved to the East Norwich Inn until Saturday.*

**Saturday, September 22  
St. Sergius Day**

9:00 AM Transport to Chancery

10:00 AM Hierarchical Liturgy

Reception follows

*Transportation to the airports after Reception.*



**MINUTES  
of the Joint Meeting of the Standing Synod  
and the 2018 Spring Session of  
the Metropolitan Council**

**Tuesday, February 6 – Thursday, February 8, 2018  
Immaculate Conception Seminary, Huntington, NY**

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*These draft minutes are subject to approval at a subsequent meeting of the Metropolitan Council*

**PARTICIPANTS**

**STANDING SYNOD**

His Beatitude, Metropolitan Tikhon  
His Eminence, Archbishop Michael  
*(except Tuesday morning)*

His Eminence, Archbishop Benjamin  
His Grace, Bishop Paul

**METROPOLITAN COUNCIL**

**CHURCH OFFICERS**

Archpriest John Jillions, *Chancellor*  
Melanie Ringa, *Treasurer*

Archpriest Eric Tosi, *Secretary*

**MEMBERS ELECTED BY THE ALL-AMERICAN COUNCIL**

Archpriest Chad Hatfield  
Archpriest Antonio Perdomo

Maureen Jury  
Katherine Vitko

**DIOCESAN REPRESENTATIVES**

**Diocese of Alaska**

Archpriest John Dunlop

Patrick Pletnikoff

**Albanian Archdiocese**

Archpriest Dennis Rhodes *(except Thursday)*

Donna Dimitri

**Bulgarian Diocese**

Priest Martin Watt

*vacant*

**Diocese of Eastern Pennsylvania**

Archpriest Timothy Hojnicky

Susan Schlasta *(except Thursday)*

**Diocese of the Midwest**

Robert Graban

**Diocese of New England**

Priest James Parnell (*except Thursday*)

Michael Danchak (*except Thursday*)

**Diocese of New York/New Jersey**

Igumen Joseph (Hoffman)

James P. Kornafel

**Diocese of the South**

Priest Joseph Lucas

Angela Parks, Esq.

**Diocese of Washington**

Archpriest Valery Shemchuk

Elizabeth Mikhalevsky

**Diocese of the West**

Archpriest John Dresko

David Lane, Esq.

**Diocese of Western Pennsylvania**

Priest Nikolai Breckenridge

Dr. John Schultz

**ABSENT**

Archpriest Alexander Kuchta (*Diocese of the Midwest*)

Archpriest Thomas Moore (*Member elected by the All-American Council*)

Deacon Nicolas Svetlovsky (*Archdiocese of Canada*)

Mark Petasky (*Archdiocese of Canada*)

Larry Skvir (*Member elected by the All-American Council*)

**GUESTS** (*for all sessions unless otherwise indicated*)

His Grace, Bishop Daniel of Santa Rosa (*except Thursday*)

Protopresbyter Leonid Kishkovsky (*Director of External Affairs and Interchurch Relations*)

*– Wednesday afternoon*

Archpriest Christopher Rowe (*Project Manager, Department of Youth, Young Adult and Campus Ministry*)

*– Wednesday afternoon by conference call*

Archdeacon Joseph Matusiak (*Secretary to the Metropolitan & Director, Stewards of the OCA*)

*– Wednesday morning*

David Drillock (*Chairman, Department of Liturgical Music & Translations – Wednesday afternoon*)

Cindy Heise (*Coordinator for the Office of Review of Sexual Misconduct Allegations*)

*– Tuesday afternoon by video conference*

Judge E.R. Lanier (*OCA General Counsel*)

Alexis Liberovsky (*Recording Secretary*)

Andrew Romanov (*Communications Intern - Wednesday morning*)

**TUESDAY, FEBRUARY 6, 2018**

Metropolitan Tikhon celebrated a prayer service at 9:00 AM on Tuesday morning at the Immaculate Conception Seminary to open the meeting.

**A. Agenda: Introduction (attached)**

The meeting was then called to order at 9:20 AM. Fathers John Jillions and Eric Tosi provided minor clarifications to the agenda.

**B. Roll Call/Approval of Minutes of Previous Meeting (attached)**

Fr. Tosi then conducted the roll call, announced guests who would be present at various points during this meeting (see participants list), and noted the absence of several persons due to illness. He requested approval

of Alexis Liberovsky as recording secretary for the meeting, which was accepted without objection. He indicated that Martin Myers is no longer in the Bulgarian Diocese and is therefore no longer a member of the Metropolitan Council. His replacement has not yet been appointed. Fr. Tosi then presented the draft minutes of the previous meeting of the Metropolitan Council on September 20-22, 2017 for approval. David Lane indicated some minor corrections needed in those minutes. The minutes of the September 20-22, 2016 meeting were unanimously accepted with corrections.

**C. Welcome**

Metropolitan Tikhon welcomed everyone present for the meeting, including the members of the Standing Synod. He welcomed Michael Danchak as a new member of the Council at this meeting and thanked those who will be completing their terms this year, for their contributions as members of the Council.

**E. Metropolitan's Report (attached)**

Metropolitan Tikhon presented his attached report. He spoke about Long-Term Planning and about Our Identity as the Orthodox Church in America, particularly in the context of their place within the *Four Pillars of the Guiding Framework* document, which will be released this spring in preparation for the 19<sup>th</sup> All-American Council. He then introduced Bishop Daniel, who outlined his work as Consultant to the Primate for optimizing the functioning of the OCA Chancery. His Grace particularly noted his many meetings with officers and staff as well as the change in His Beatitude's office location in the Chancery building and the resultant relocation of other offices. He also spoke about his joint work with the Human Resources Committee to update staff job descriptions. Metropolitan Tikhon continued his report by highlighting work in the areas of Communications and External Relations, particularly with regard to his recent travels to Russia and Mexico.

Following a short recess at 10:48 AM, the session resumed at 11:12 AM.

Questions and extensive discussion ensued, particularly concerning a variety of possible ways the Church could appropriately mark the 50th anniversary of autocephaly in 2020.

Following a recess for lunch at 11:58 AM, the afternoon session was called to order at 1:29 PM.

**F. Chancellor's Report (attached)**

Fr. John Jillions summarized his attached written report and appendix. He particularly noted the significance of the upcoming 19<sup>th</sup> All-American Council and the recent office reorganization at the Chancery.

**F.2. SMPAC**

Fr. Jillions presented the confidential report of the Sexual Misconduct Policy Advisory Committee (SMPAC), which provided a summary of its recent meetings. Statistical data regarding annual compliance with the Policies, Standards and Procedures (PSPs) of the OCA on Sexual Misconduct within each diocese for the years 2015 and 2016 was distributed to the Council for information.

**F.1. ORSMA**

Cindy Heise delivered the confidential report of the Office of Review of Sexual Misconduct Allegations (ORSMA), which included case statistics and coordinator activities. Questions and discussion on various issues pertaining to SMPAC and ORSMA ensued.

Following a short recess at 2:44 PM, the session resumed at 3:03 PM.

## **G. Secretary's report (attached)**

Fr. Eric Tosi presented updates to his attached report and appendices. He reported on the purchase of a used vehicle for a replacement vehicle for the chancery. He also noted finalization of the standard metrical book for church-wide use and pectoral crosses for military chaplains. He then detailed progress in preparatory steps towards renovation of the Chancery basement, where the OCA Archives are located, and noted, in particular, a positive meeting with the local County legislator and the assistant County Fire Marshal the previous week. Permits need to be obtained before work can begin. Alexis Liberovsky, OCA Archivist, provided additional comments on the current status of the Archives. Fr. Tosi also reported on chancery property maintenance and technology issues. Questions and discussion of the report ensued.

### **G.1. 19<sup>th</sup> All-American Council (attached)**

Father Tosi summarized his attached report with appendices and indicated that all preparations for the 19<sup>th</sup> AAC are proceeding in an efficient and timely manner. He presented the draft agenda and schedule for approval. Questions and discussion ensued. Bishop Paul provided additional comments on the work of the Preconciliar Commission, which he chairs. Funding to enable clergy from Alaska and Mexico to attend the Council was also discussed.

**G.1.A. MOTION MIKHALEVSKY/PARNELL – To accept the draft agenda and schedule for the upcoming 19<sup>th</sup> All-American Council as presented and to recommend their approval by the Holy Synod. CARRIED.**

## **H. Legal matters**

**H.1. MOTION DRESKO/JURY – To move into executive session. CARRIED.**

In executive session, Angela Parks, Legal Committee chairperson, and Judge E.R. Lanier, OCA General Counsel, presented the confidential report of the Legal Committee, which covered a variety of current and potential legal issues.

**H.2. MOTION DRESKO/WATT – To move out of executive session. CARRIED**

Fr. Tosi introduced for adoption the attached *GIFT AND BEQUEST ACCEPTANCE POLICIES OF THE ORTHODOX CHURCH IN AMERICA*. Judge Lanier provided further information on legal aspects of this document. In discussion, it was recommended that all church communities including dioceses, parishes and institutions should adopt similar policies.

**H.3. MOTION MIKHALEVSKY/HATFIELD - To approve as presented the *GIFT AND BEQUEST ACCEPTANCE POLICIES OF THE ORTHODOX CHURCH IN AMERICA*. CARRIED with 3 opposed (Jillions, Jury, Lane).**

Fr. Tosi introduced for adoption the attached *GENERAL POLICIES OF THE ORTHODOX CHURCH IN AMERICA REGARDING COMMERCIAL RELATIONSHIPS WITH COMMERCIAL AND FOR-PROFIT VENDORS, SUPPLIERS, AND CONTRACTORS*, and Judge Lanier provided some legal clarifications on this document.

**H.4. MOTION PARNELL/DANCHAK - To approve as presented the *GENERAL POLICIES OF THE ORTHODOX CHURCH IN AMERICA REGARDING COMMERCIAL RELATIONSHIPS WITH COMMERCIAL AND FOR-PROFIT VENDORS, SUPPLIERS, AND CONTRACTORS*. CARRIED.**

The day's sessions were adjourned with prayer at 5:28 PM.

**WEDNESDAY, FEBRUARY 7, 2018**

Following the celebration of a Divine Liturgy at Saint Sergius Chapel at 8:00 AM, the morning session was opened with prayer at 11:05 AM.

**I. Stewards of the OCA (attached)**

Archdeacon Joseph Matusiak, Director of the Stewards of the Orthodox Church in America (SOCA), presented his attached report. Additionally, he acknowledged the assistance of media intern Andrew Romanov, particularly in the development of a social media strategy. In discussion, various suggestions for cultivating gifts were offered. Archdeacon Joseph asked Council members for volunteer help in coordinating SOCA's presence at the upcoming 19<sup>th</sup> All-American Council.

**J. Metropolitan Council Committees**

**J.1. Charity (attached)**

The attached report from the Committee and its work were discussed. It was noted that the Committee will need a new chairperson and several members due to the expiring Metropolitan Council terms of the current chairman and some other members.

**J.2. Ethics**

Committee members indicated that the Committee has nothing to report at this time.

**J.3. Human Resources**

Elizabeth Mikhalevsky, Committee Chairperson, reported that the Committee has been working with Bishop Daniel on the chancery personnel structure. She indicated that two subcommittees had been formed: she will head one which will review job descriptions, while David Lane will head the other which will update the employee handbook.

**J.4. Internal Governance (attached)**

Archpriest Chad Hatfield, Committee Chairman, reported that D'Arcangelo & Co., LLP. has been engaged as external auditor for the audit of 2017 financials.

**J.4.A. MOTION WATT/DRESKO – To approve the engagement of D'Arcangelo & Co., LLP. for the external audit of 2017 financials. CARRIED.**

Father Tosi indicated that suggestions for the Metropolitan Council's fall retreat should be submitted to Father Chad. He also noted that the Internal Governance Committee will be updating the Metropolitan Council Handbook. The need to revise the charter of the Legal Committee was discussed.

Following a recess for lunch at 12:27 PM, the afternoon session was called to order at 1:31 PM.

**K. Treasurer's Report (attached)**

Melanie Ringa highlighted the attached Treasurer's report and appendices, which includes preliminary 2017 financial results and projections for 2018. She also reported on her extensive work together with the staff at St. Catherine's OCA Representation Church in Moscow and officials from the Moscow Patriarchate to audit its finances and to rectify disorders in recordkeeping, which had been going on for several years. She noted that new controls and staff are now in place to ensure accountability and transparency. Discussion and questions on various financial matters ensued. Melanie introduced the following motions:

**K.1. MOTION BRECKENRIDGE/LANE – To submit to the Holy Synod with a recommendation for approval the following draft finance resolution, which will ultimately be presented for adoption at the 19<sup>th</sup> All-American Council:**

*“The Holy Synod of Bishops of the Orthodox Church in America affirms the important role of the Synodal Chancery in the work of the OCA. We also encourage the continuing transition to proportional giving as the best means of supporting the work of the Church. At the 18<sup>th</sup> All-America Council held in Atlanta, Georgia in July 2015, this body passed a funding resolution, recognizing that each diocese was at a different place in this process. For the year 2018, the territorial dioceses, with the exception of the Dioceses of the West and South, are contributing 46% of their “net operating budgets” to the work of the Synodal Chancery, while the Dioceses of the West and South contribute 34% of their “net operating budgets”. To this end, and to continue working toward a common contribution rate for all territorial dioceses, we unanimously recommend the adoption of the following financial resolution:*

For the budget years of 2019, 2020, 2021 and 2022 each territorial diocese with the exception of Canada, Mexico and Alaska shall remit its annual financial obligation for the work of the Synodal Chancery according to the following formula:

Dioceses contributing at a rate greater than 34% of their “net operating budgets” shall decrease their annual diocesan financial obligation by 2% annually from 2019 through 2022, not to fall below 34%.

Dioceses contributing at the 34% rate of their “net operating budgets” shall continue to remit their annual financial obligation at the 34% rate from 2019 through 2022.

For the budget years 2019 through 2022, the Archdiocese of Canada and the Diocese of Alaska shall remit their annual diocesan financial obligation at the rate of 10% of their net operating budget.

The financial arrangements of the non-territorial dioceses (Romanian Episcopate, Albanian Archdiocese, and Bulgarian Diocese) are based upon agreements made when they entered the OCA and are within the competency of the Holy Synod, subject to periodic review.” CARRIED with 20 votes in favor and 6 opposed.

- K.2. MOTION HOFFMAN/HATFIELD - To approve the recommendation of the Finance Committee to increase the 2018 operating budget by \$38,500 for renovations to the OCA Chancery building (to include roof replacement - \$20,000; driveway paving - \$4,500; window replacement - \$6,000 and a new front door - \$8,000), to be funded from the unrestricted bequests from the estates of Julia Nazak and Larissa Kondratick (total \$38,907) received in 2017. CARRIED.
- K.3. MOTION DRESKO/WATT – To approve the recommendation of the Finance Committee amending the 2018 operating budget in the following manner:
  - a. Increase the Diocesan Support revenue by \$20,000 to reflect updated 2018 diocesan projections based on information from the diocesan treasurers;
  - b. Increase the Operating budget for St Catherine’s Representation Church by \$21,500 to reflect the increased cost of the new rector at St Catherine’s (\$11,500 of this increase represents one-time expense in 2018 for relocation of the rector’s family to Moscow and four-month apartment rent expense while their permanent residence is being renovated). CARRIED.
- K.4. MOTION GRABAN/DANCHAK - To approve the recommendation of the Finance Committee releasing the bequest from the estate of Father Alexander Pihach (\$36,880) to be used to renovate the Moscow apartment for the OCA Representative to St Catherine’s Church in Moscow. CARRIED.
- K.5. MOTION HATFIELD/SCHULTZ - To approve the recommendation of the Finance Committee to take \$150,000 from the Missions Endowment at Philadelphia Trust Co and invest this sum in a 5-year deposit at OCCIF (Orthodox Church Capital Improvement Fund) at a rate of 2.75%.

In discussion, questions arose regarding legal aspects of this transaction and the motion was tabled pending further information from the Legal Committee.

Following a short recess at 3:26 PM, the session resumed at 3:47 PM.

**M. External Affairs Report**

Protopresbyter Leonid Kishkovsky, Director of External Affairs and Interchurch Relations, delivered an oral report on the various activities of the Orthodox Church in America through interaction with other Orthodox Churches, non-Orthodox bodies, government officials and other organizations. He particularly highlighted the fruitful contacts with the Moscow Patriarchate and other Orthodox Churches during the celebrations in Moscow in December. He noted the importance of the appointment of Father Daniel Andrejuk as the new OCA Representative in Moscow. Bishop Daniel provided further details on the current status of St. Catherine's Church in Moscow.

**N. Department Reports**

**N.2. Youth, Young Adult and Campus Ministries (attached)**

Archpriest Christopher Rowe, Project Manager, presented the Department's attached report via conference call. Father Eric Tosi provided additional information on OCA participation in scouting programs. In discussion of the report, a skills inventory was suggested to enhance the work of the department.

**M. External Affairs Report (continued)**

Bishop Daniel resumed his report on the OCA Representation Church in Moscow and indicated that the Advisory Committee for Saint Catherine's Church appointed by His Beatitude, Metropolitan Tikhon last summer, which includes Fathers Leonid Kishkovsky and Nazari Polataiko as well as Melanie Ringa and Bishop Daniel, would continue its work in facilitating the supervision of the OCA Representation Church. Bishop Daniel reported that Father Andrejuk is grateful for guidance from the Committee as he begins his ministry in Moscow. Fr. Kishkovsky continued his overview of external church relations outlining the situation of several Orthodox Churches and the status of ecumenical organizations.

**N. Department Reports (continued)**

**N.2. Liturgical Music and Translations (attached)**

David Drillock, Department Chairman, presented its attached report. He noted the growing number of music downloads and liturgical texts on the OCA website. He expressed particular satisfaction with the success of the online choral conducting courses that are offered by the Department. Questions and discussion ensued.

The day's sessions were adjourned at 5:28 PM.

**THURSDAY, FEBRUARY 8, 2018**

The morning session was opened with prayer at 9:05 AM.

**P. Pension Board Report (attached)**

Father Eric Tosi delivered the attached report submitted by Father Gleb McFatter, Pension Board Chairman. Father Jillions indicated that every effort is made to ensure that all those who are eligible are enrolled in the OCA Pension Plan. In discussion, Metropolitan Council members requested that a Pension Board member be present at its every meeting to answer questions and provide information.

**K. Treasurer's Report (continued)**

Melanie Ringa and Father Martin Watt provided further information on the following motion that had been tabled the previous day. Judge Lanier indicated that there were no legal impediments to the resolution.

**K.6. MOTION HATFIELD/MIKHALEVSKY - To approve the recommendation of the Finance Committee to take \$150,000 from the Missions Endowment at Philadelphia Trust Co and invest this sum in a 5-year unsecured promissory note with OCCIF (Orthodox Church Capital Improvement Fund) at a simple interest rate of 2.75%, to be paid quarterly. CARRIED with 17 votes in favor, 0 opposed and 5 abstentions (Dresko, Graban, Lane, Vitko, Watt).**

All but one of those abstaining indicated that they have a financial or fiduciary connection to the OCCIF (Orthodox Church Capital Improvement Fund).

**Q/R. Strategic Planning/Open Discussion**

A wide-ranging discussion on various issues took place focusing largely on the attached *Questions for Reflection* distributed by Metropolitan Tikhon. Notable topics included the vision and identity of the Orthodox Church in America and preparations for the upcoming celebration of the 50<sup>th</sup> anniversary of our Church's autocephaly. It was generally agreed that events and other undertakings in conjunction with the anniversary should encourage both reflection on our past and a look forward towards the future. Other points raised included:

- The need for updated parish education materials
- "Catechesis of the Good Shepherd:" experience in some dioceses is showing success
- The need to face an emerging clergy shortage
- Support for the "1% resolution" from past AACs, calling all parishes to give at least 1% of their budget to support theological seminaries
- Encourage and support candidates to attend seminary
- Assess need for consolidation of dwindling congregations in some parts of the country
- Call for systematic strategic planning, especially in theological education, to address vocations, clergy shortage, alternative forms of clergy formation, funding of seminaries
- Articulate a path forward for Orthodox unity in North America
- Re-evaluate the aims and membership of all departments, including External Relations"

**T. Adjournment**

Council members were reminded that the next regular meeting of the Metropolitan Council is scheduled for September 18-21, 2018. In concluding remarks, Metropolitan Tikhon thanked Council members for a productive meeting and declared the meeting closed.

The meeting was adjourned with prayer at 12:14 PM.

Respectfully submitted,

Alexis Liberovsky,  
Recording Secretary

# Metropolitan Council

*As of August 9, 2018*

His Beatitude Metropolitan Tikhon  
*Archbishop of Washington and Metropolitan of All America and Canada*  
6850 North Hempstead Turnpike  
Syosset, NY 11791  
(516)922-0550  
Email: [metropolitan@oca.org](mailto:metropolitan@oca.org)

## Officers of the Orthodox Church in America

Archpriest John A. Jillions (Chancellor)  
10 Galway Place  
Huntington, NY 11743-6229

Home: 631-549-2124  
Email: [jjillions@oca.org](mailto:jjillions@oca.org)

Archpriest Eric G. Tosi (Secretary)  
140 Summers Street  
Oyster Bay, NY 11771-3710

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CH, ET, IG

CD, HR, IG, LE

Melanie Ringa (Treasurer)  
29 Wellsville Avenue  
New Milford, CT 06776-2720

Home: 860-210-7933  
Email: [mringa@oca.org](mailto:mringa@oca.org)

FI

## Members elected by All-American Council

### Members elected at 18<sup>th</sup> AAC for Six-Year Term

Archpriest Anthonio Perdomo  
520 West Rosemary Avenue  
Pharr, TX 78577-0667

Cell: 956-358-8875  
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Katherine Vitko  
6220 Loch Raven Drive  
McLean, VA 22101-3133

Home: 925-667-6451  
Email: [kittyv70@gmail.com](mailto:kittyv70@gmail.com)

CH, ET, HR

HR, IG

### Members elected at 19<sup>th</sup> AAC for Three-Year Term

Archpriest Thomas Moore  
634 Wren Road  
Lexington, SC 29073-9106

Cell: 803-318-6093  
Church: 803-926-8744  
Email: [frthomas@holypostles.org](mailto:frthomas@holypostles.org)

M. Lynnell Brunswig  
3418 Humphrey Street SE  
Olympia, WA 98501-3941

Cell: 360-480-2818  
Email: [lynnellbrunswig@comcast.net](mailto:lynnellbrunswig@comcast.net)

CH, ET

<b>Members elected at 19<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest Kirill Sokolov 1520 Green Street San Francisco, CA 94123-5102</p> <p>Church: 415-673-8565 Cell: 415-300-0106 Email: <a href="mailto:frkirill@holy-trinity.org">frkirill@holy-trinity.org</a></p>	<p>Mark Linnehan 1065 Country Club Road Camp Hill, PA 17011-1049</p> <p>Home: 717-730-3733 Email: <a href="mailto:mark@linnehan.net">mark@linnehan.net</a></p>
<b>Alternates elected at 19<sup>th</sup> AAC for Three-Year Term</b>	
<p>Archpriest David Rucker 1080 Bella Vista Blvd Apt 106 St. Augustine, FL 32084-1298</p> <p>Cell: 904-599-5812 Email: <a href="mailto:dcrucker@aol.com">dcrucker@aol.com</a></p>	<p>Michael Thompson 2622 DePaul Drive Vienna, VA 22180-7052</p> <p>Home: 703-204-9092 Email: <a href="mailto:dunaad@msn.com">dunaad@msn.com</a></p>
<b>Members Elected by Diocese</b>	
<b>Diocese of Alaska</b>	
<p>Archpriest John Dunlop 414 Mission Road Kodiak, AK 99615-6329</p> <p>Home: 907-486-0950 Email: <a href="mailto:frjohn@sthermanseminary.org">frjohn@sthermanseminary.org</a></p>	<p>Subdeacon Patrick Pletnikoff PO Box 71484 Fairbanks, AK 99707-1484</p> <p>Cell: 907-378-6818 Email: <a href="mailto:patrickjeremyp@yahoo.com">patrickjeremyp@yahoo.com</a></p>
CH	FI
<b>Albanian Archdiocese</b>	
<p>Archpriest Dennis Rhodes 749 Garfield Avenue Bridgeport, CT 06606-5254</p> <p>Cell: 203-598-4678 Email: <a href="mailto:dennistr648@hotmail.com">dennistr648@hotmail.com</a></p>	<p>Donna Dimitri 1901 Beverly Road Burlington, NJ 08016-1114</p> <p>Cell: 609-685-1651 Email: <a href="mailto:donnadimitri@gmail.com">donnadimitri@gmail.com</a></p>
CH	LE
<b>Bulgarian Diocese</b>	
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	ET, HR
<p><b>Committee Codes:</b> CH = Charity ET = Ethics FI = Finance/Investment</p>	<p>HR = Human Resources IG = Internal Governance LE = Legal <b>Bold/Italic = chairperson</b></p>

**FROM: Archpriest Eric G. Tosi, Secretary**  
**TO: Holy Synod and Metropolitan Council**  
**DATE: July 11, 2018**  
**REF: Metropolitan Council Committees**

The following is the organization of the Metropolitan Council for the current term. Each member volunteered to serve on the different committees. Each committee has a member of the Lesser Synod and an officer of the Church.

1. Currently these are the established committees. Charity, Ethics, Finance/Investment, Human Resources, Internal Governance, Legal. These committees must have at least three members of the MC to be qualified under NY State non-profit law. The Financial Development Committee was merged with Finance Investment committee.
2. There are special committees that must have at least 1 member under NY State Non-profit law and have qualifications to serve. They are legal and charity.
3. There is an Internal Auditor Committee which is mandated by the AAC and is comprised of qualified external people who report to the MC.
4. There are 32 members (Metropolitan), 3 officers, 4 at large and 24 diocesan)
5. Each MC member should be a member of one committee and all should serve
6. Additional membership on a committee from outside the MC should be termed consultants and approved by Metropolitan and Metropolitan Council
7. Each committee chair will be chosen within the committee and be responsible for all meetings, communication and present a report at each meeting
8. Each committee should be a mix of clergy and lay and take into account skill sets

**Charity (Special and needs 501©3 charitable training):**

**Fr. Alexander Kuchta (chair)**  
**Bishop Melchisedek (Synod Liaison)**  
Fr. John Jillions (Chancery Liaison)  
Fr. John Dunlop  
Fr. Chad Hatfield  
Fr. Thomas Moore  
Fr. Antonio Perdomo  
Fr. Dennis Rhodes  
Michael Danchak  
Bob Graban  
Maureen Jury  
Lisa Mikhalevsky

**Ethics:**

**Fr. Thomas Moore (Chair)**  
**Bishop Alexander (Synod Liaison)**  
Fr. John Jillions (Chancery Liaison)  
Fr. Gabriel Bilas  
Igumen Joseph Hoffman  
Fr. Timothy Hojnicky  
Fr. Antonio Perdomo  
Fr. Valery Shemchuk  
Susan Schlasta  
Dr. John Schultz

**Finance/Investment:**

**Fr. John Dresko (Chair)**  
**Bishop Irene (Synod Liaison)**

Melanie Ringa (Chancery Liaison)  
Fr. James Parnell  
Bob Graban  
Maureen Jury  
Mark Petasky  
Jeremy Pletnikoff  
Larry Skvir

**Human Resource:**

**Lisa Mikhalevsky (Chair)**  
**Archbishop Nathaniel (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
Igumen Joseph Hoffman  
Fr. John Dresko  
Fr. Joseph Lucas  
Fr. Antonio Perdomo  
Fr. Valery Shemchuk  
PDN. Jesse Isaac  
David Lane  
Dr. John Schultz  
Katherine Vitko

**Internal Auditors:**

*Not a Committee per MC but reports to MC as through  
AAC amendment to statutes*

**John Skrobot**  
**Dimitri Pletz**  
**Theodora Blom**

**Internal Governance:**

**Fr. Chad Hatfield (Chair)**  
**Bishop Melchisedek (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
Michael Danchak  
Bob Graban  
James Kornafel  
Katherine Vitko

**Legal (Special and needs legal qualifications):**

**Angela Parks (Chair)**  
**Archbishop Nikon (Synod Liaison)**  
Fr. Eric G. Tosi (Chancery Liaison)  
David R. Lane, esq.  
Donna Dmitri  
*Gregory Nescott (consultant)*  
*Judge E. R. Lanier (consultant)*

**Metropolitan Council  
September 19-21, 2018**

**Chancellor's Report**

As you know, His Beatitude, Metropolitan Tikhon is undertaking a restructuring of the OCA Chancery, which will include new job descriptions and new personnel for the three officer positions, beginning January 1, 2019. So this will be my last report to a Metropolitan Council meeting. It will also be very brief, since at the recent All American Council in St Louis I gave you a complete review of my past seven years as chancellor. I will make just two points here: first about the restructuring, and second about the role of the Metropolitan Council.

His Beatitude mentioned in his opening report yesterday that the officers were given the opportunity to review and comment on the draft job descriptions and reporting structure being prepared by the restructuring committee headed by His Grace, Bishop Daniel. I would like to share with you my response, since there has been some understandable anxiety, uncertainty and skepticism about the restructuring process.

In my opinion the new structure and job descriptions represent a huge step forward, and with these in place the Metropolitan and the OCA central administration will be much more effective and happier. The new plan addresses the three biggest stumbling blocks I've experienced in the OCA's central administration:

- 1) Isolation (silo-ing) of the officers' functions from each other
- 2) Lack of chancellor's authority to act as chief of staff for the Metropolitan
- 3) Not addressing breakdowns in personal and working relationships.

This last point is of particular concern. Much good work has been accomplished in spite of the past organizational problems in the chancery. But *how* we accomplish our work and *how* we relate to each other at every level of church life is just as important. All of us in positions of leadership—bishops, clergy, laity—must be held accountable for the personal manner in which we exercise our ministry. Breakdowns are inevitable from time to time and we all have to ask forgiveness for our errors, blindspots and faults. Dealing with such interpersonal and organizational conflicts can be unpleasant, and may require outside advice and help. But left on their own such problems only get worse.

I am a great believer in the approach the apostles displayed to conflict in Acts 6. They became aware of murmuring between two groups within the Jerusalem church community, the Hebrews and Hellenists. Both parties were Jewish-Christians, but the Hebrews had been raised in Hebrew-speaking Judea, while the Hellenists had been raised in the Greek-speaking diaspora and immigrated to Judea. So there was some natural tension over culture and language, even though they were all followers of Christ as Messiah. The Greek-speakers were in the minority and felt that the needs of

their elderly widows were being neglected in the daily distribution of food. Hence the murmuring and tension. Once the apostles became aware of this breakdown, they addressed it directly and in a timely manner, with the result that seven deacons were appointed to ensure the trustworthy and smooth operation to the satisfaction of all.

As my second point I want to underline the importance of the Metropolitan Council for the health of the Orthodox Church in America. The OCA Statute gives the Metropolitan Council broad responsibility and authority for carrying out the work of Church administration between All-American Councils. The MC is thus an integral part of the OCA's historic vision for a Church life that brings together both the hierarchical and conciliar, both clergy and laity in decision-making in the Body of Christ. This is also essential to the checks and balances that—when each part is healthy and strong—keep the Church as a whole from going off the rails. The OCA knows only too well from bitter past experience what happens when such vigilance weakens.

Finally, I wish to express my gratitude to Metropolitan Jonah, Metropolitan Tikhon, the Holy Synod and the Metropolitan Council for giving me the opportunity to serve the OCA as your chancellor. Whatever the challenges, what remains with me most from these seven years is the privilege of witnessing the grace of God at work in our midst at every level of our Church's life.

Respectfully submitted,

Archpriest John A. Jillions  
September 20, 2018

# **19<sup>th</sup> All American Council Post Council Report Archpriest Eric G. Tosi**

## **1. Introduction**

On behalf of the Preconciliar Committee and the Local Committee of the 19<sup>th</sup> All American Council, I present this report. We are all most grateful for a successful Council which was the culmination of two years of work. While any Council has its various challenges, this Council was especially peaceful and well run. As one can see in the accompanying slides, the overall impression of the Council was very positive.

Our gratitude must go to the Preconciliar Commission, the Local Committee, the Council Committees and the many volunteers who planned and executed the Council. They were all of the utmost professionalism and attentiveness both before and during the Council. Special mention should be made of the local Chairs, Fr. Timothy Sawchak and Bob Butchko who put together an exemplary team and group of volunteers that were spread through the Kansas City Deanery. It should be noted that it takes over 80 volunteers to operate a Council with duties that range from gathering and transporting the various needs for the Council as well as manning the various booths and committees. The local committee worked long hours with a great sense of serving the Church. The vice-chairs, the General Counsel and the parliamentarian all worked very well together and the sessions were very well run.

This report will basically follow the accompanying PowerPoint presentation which summarizes the Post Council survey which was sent out two weeks following the Council. Of the 670 recipients who received the survey (the approximate number of those who registered for the Council) 238 responded. This is slightly better than the last Council's survey. While not a complete survey, it is generally an excellent picture of the Council itself. Other material is drawn from recommendations from various chairs of the local and Council committees.

## **2. Precouncil Review**

The most important part of the planning of the Council is to begin early. This allows for a more in-depth planning agenda but also allows for the many variables such as the venue and the planning to be locked in well in advance. The planning for this Council began two years prior which allowed the planning committee to examine a number of venues and decide on a venue well in advance. With the current convention environment this is making it more critical as many venues are now locking in conventions up to three years in advance. So planning for the next All American Council has already begun in that a list of 25 cities has already been submitted to Conference Direct to explore and negotiate on the OCA's behalf. I would note that we do not pay Conference Direct but rather the hotel venue that is chosen pays a percentage to them. We need to continue to use Conference Direct as they have a much greater power of negotiations than the OCA could muster. As an additional note, Conference Direct does look at all types of venues from hotels to universities and other such venues. The OCA establishes the parameters of the needs for an All American Council and venues bid based on those parameters. There are many venues that simply will not bid while others are quite anxious for the Council. The list is slowly whittled down to a

manageable number and these venues are visited for on-site negotiations. Ultimately three or so venues are selected for consideration.

The other critical aspect of the Precouncil is selecting a region that can support the Council in terms of volunteers and assistance. While some venues may be attractive there is simply not enough of a local presence to make a Council work there. So while considering venues, there also needs to be a consideration if a Council can actually work in that city or region.

Because the Precouncil had an early start, many of these issues were resolved well in advance and after the final blessing of the Synod, a local committee was formed who began to do the work in that region. St. Louis was excellent because of the experience of the people there as well as the ability to draw from a larger region for assistance. There were absolutely no issues from the local committee and the organizing happened fairly quickly. It should be noted that a large portion of the local committee work did not start until a few months before the Council or at the Council itself (i.e. volunteers for the registration booths or drivers for the bishops).

The other important piece is the electronic registration. After looking at a few other electronic registration companies, we decided to return to 123Sign-up because it was free and fairly flexible (though not ideal). Ryan Platte was able to write a program which took the registration material and translated them into badges for the registrants to be scanned upon entrance to the plenary sessions. This system worked well though there were some issues initially as it was being finalized. It was good to have some local and on-site technical support to resolve those issues before the Council began. The electronic registration system will continue to be refined.

### **3. Survey Results**

There were 15 questions asked in the survey with 2 open ended questions (a respondent can answer in any manner).

#### **A. Question 1 and 2**

The overwhelming response to Question 1 was average to far above average. What makes this question important was that people came away with a positive impression of the Church and will relate that impression to their parishes. The Holy Synod had asked that the delegates leave with a positive impression and this was accomplished.

Again very positive responses to Question 2 in that the Council was very positively received as compared to other Councils. This is important to gauge how the planning process and operations are evolving through the years. Of considerable note is the number of first time attendees which is an excellent sign of involvement in the Church.

#### **B. Question 3 and 4**

Again excellent marks for Question 3 as the venue was seen as above or far above average. A few notes on the venue. It was an excellent venue with the price and atmosphere. The vendors had record sales due to their location in the Midway. There were some complaints about the distance between the venue (no

way near to the distance in Seattle) and the lack of dining choices. We tried to alleviate this with the food trucks which were fairly successful though we could have had a few more with some differing choices.

In response to Question 4, the overall impression is that this was the best venue we have had. There were no issues with the management and they were very attentive to our needs and issues. An anecdotal story was that I was speaking to some people in the highest management at the hotel near the end of the Council and they remarked how wonderful our people were to the staff and pleasant to serve overall. They often do not have that experience with other Christian groups and they appreciated ours (and a number of the staff attended the services). So we did well with the hotel and the hotel was very pleased with the OCA.

#### C. Questions 5 to 8

These questions dealt with the actual structure and operation of the Council. There have been a number of comments over the years about how to balance the various parts of the Council whether it be plenary sessions, liturgical, etc. A number of ways have been tried and we believe that we have hit the right balance. The only major piece missing is more social time which is very difficult due to the many things that have to happen at an All American Council. We did try to give some time on Thursday after the plenary session but before the formal dinner. More creative ways need to be explored.

Question 5 clearly demonstrates that there was a good balance on liturgical services. Question 6 confirms that within the overall structure of the Council. It must be remembered that there were only 5 plenary sessions and so a lot of material needed to be fit into a short space. Question 7 demonstrates that the diocesan videos were very well received. The reason they were shown at the beginning of each plenary session was to give time for people to come in so we had an accurate count. I would recommend spacing them out throughout the sessions next time but continuing the diocesan videos.

Question 8 was a ranking question which demonstrates the most well received part of the overall Council. Liturgical services, social and youth were clearly the most well received followed by the diocesan videos and forums. I believe that this shows that we are hitting on a healthy balance in the format of an All American Council.

#### D. Questions 9 and 10

These questions were more focused on specific aspects. His Beatitude wanted to know how his address was received and clearly it was very well received. Question 10 was on the forums. While at first glance they seem to be more even, a further look at the numbers showed that Stewardship and Spiritual Life received the highest ratings. Clergy Care and the two evangelism forums received good ratings and External Affairs did not fare as well. Remember that these forums were taken from the “4 Pillars” and related directly to them.

#### E. Questions 11 to 13

These questions related to future planning of the next Council. Question 11 clearly demonstrates that there should be a youth component (which has received incredible reviews). This means the next Council will need to be in the summer months in order for the youth to attend. Question 12 demonstrates that the preferred location of the next Council is the Northeast and the West. Both of these will be a challenge due

to hotel prices and demand but they will be high on consideration. Question 13 explored different possible themes. The four themes that received the strongest endorsement were Developing the Youth, Moral and Spiritual Challenges, 50<sup>th</sup> Anniversary of Autocephaly, and Uniting the Orthodox Church in North America. These should be considered in the planning of the next Council.

#### F. Question 14 and 15

These questions were the open-ended questions which focused on how the Council can be improved and any comments to assist the planning.

The most commented on issue was times at the plenary session (almost 2/3 of the comments) in which delegates asked for the time management to be tighter and reports to be shortened. This is always a difficulty as many people want their time at the Council and once they are there (despite being given clear and strong instructions as well as clock for reference), they still go over their allotted time. A recommendation from the parliamentarian was to shorten many of the reports from 10 to 5 minutes and to strictly adhere to the time. The Council vice chairs tried not to interfere unless absolutely necessary but clearly this needs to be tightened (and the number of people reporting reduced).

The next commented issue was the need for free time during the Council as well as for meal breaks/stretching breaks. This balance has been worked on and we can do much better in giving more free time to see the host city or to social functions. But it would need to be thought out clearly because that reduces the time to do the business of the Church. Meal breaks, etc. are always a challenge to feed that many people in a short time.

Another issue is to ensure there was time for questions and discussion. While this was built into the agenda, the long running plenary session meant that there was not time available for such things. I would note that there were very few questions in the open discussion this time but time must be made available for this.

A perennial question is the expense and length of the All American Council. The planners are very aware of the costs involved and as such keep the price to a reasonable level. Even if the length was shortened to three days, it would not significantly change the costs for running the Council (the individual expenses would be reduced for hotels and meals). Much of the negotiations with hotels provides a level of what is offered (free rooms, conference space, etc.) that is dictated by the number of room nights the OCA utilizes. If we do not meet that level then we would have to pay for more items and the expense would actually increase. So it is a delicate balance to get as many items free for our hotel usage. Likewise, if we went to another type of venue (and we have examined this in-depth) the expenses would not decrease as we would have to rent or bring in many items missing on a campus, for example, food service, AV equipment, etc. These do not reduce expenses and actually make the operation more difficult (not to mention many universities no longer offer such services due to them finding it not profitable). So it is best to keep with a hotel venue.

The forums received mostly positive reviews though some felt they could have been better organized. There is probably some truth to this because despite having a year advance notice, some forums were not finalized until very late. But on the whole, delegates enjoyed the chance to speak together and to interact with the bishops.

However, it should be noted that many comments were positive and lauded the hard work done by the many people involved in the Council. By far we received the most positive comments in the five All American Councils I have been involved in during my time as Secretary.

#### **4. Comments by Others**

There were a few comments coming in from those involved in the Council. As mentioned, the parliamentarian had a few comments on the operation of the Council which included some specific wording in phrasing instructions as well as some organizational tips on time management. His presence was very helpful and thankfully we did not have any major issues

Comments by others include increasing the usage of electronic forms for nominations and credentials as well as to again try to get electronic voting (which has not been used due to the unreasonable expenses of the system).

For the second Council in a row we had an issue with transporting items to the city. We utilized two rental trucks which were driven by seminarians and made multiple stops along the way. There were two incidents of damage by the trucks, one which had to involve the insurance to make repairs. We should look into whether to continue to have seminarians drive the trucks and if so then at least two people in each truck.

There was also a significant presence of non-OCA hierarchs and clergy at the Council. The reports from them were very positive and they were impressed by the All American Council. His Beatitude met with each of the representatives during the Council and this did much for advancing the Orthodox Church in America. More non-OCA presence is critical as we move forward in the life of the Church.

#### **5. Final Recommendations**

- A. Begin the search process now and start the planning as soon as possible for the next Council. Focus on the Northeast and the West. Always be conscious of the costs involved for parishes and individuals.
- B. Continue with the current structure of the Council Supervisor and Council Manager (planning and operations and logistics). Ensure the PCC is populated in the current manner by people who have a specific duty in each area
- C. Look at the overall structure of the Council itself and keep the healthy balance in the differing elements. Keep a strong liturgical element in the Council, plan for more free time and seriously look at what can be realistically done at the plenary sessions. Open the time up for questions and discussions as well as interaction among the delegates.
- D. Continue to use a parliamentarian who understands the Church (Judge Lanier and I spend time training the parliamentarian as well as the vice-chairs)
- E. Use the electronic registration system and the scanning system. Try to get electronic voting integrated in to the Council. The more we use the IT aspects, the less cost, and need for volunteers.
- F. Make sure everything is published well before hand and after the Council. The more information there is sent out, the better the Council operates. Interestingly there were very few resolutions submitted beforehand and during the Council than ever before. The only Statute amendments came through the Holy Synod and the Metropolitan Council.

- G. Try again to move the AAC to 4 years but clearly explain how the Council will be for business only and the midpoint between Council will have another Church-wide event such as a family life conference or evangelism conference.
- H. Tightly monitor expenses because they can quickly go over a budget if they are not watched. Melanie Ringa will be presenting the final numbers but we are on or under budget for this Council. This is not an accident but through a careful implementation of cost control and monitoring.
- I. Keep using the website (and the AAC website) to publish and archive material for the Council. It is an invaluable resource.
- J. Keep the Youth Program. It is one the most successful parts of the AAC and the youth loved it. The raising of money for a national youth director at the end of the Council proves the need.
- K. Keep the FOCA convention in alignment with the Council so they can both mutually benefit from the experience.
- L. Use local people and local experience. This allows for a much healthier Council but it also makes connections which benefit the Council during critical moments of negotiations.
- M. Do not forget to thank the many people involved. There is a lot of volunteer time spent behind the scenes and they must be acknowledged and rewarded for their efforts. I always tell the local volunteers that we should be sad when it is over because we had such a great time together. Keep that maxim true.
- N. Keep at least two session to be forums/workshops/seminars, etc. that are led by members of the Synod. This allows for a greater interaction with the Church and builds trust outside the dioceses.
- O. Keep the diocesan videos. They are inspiring and show the rest of the Church what is happening throughout the Church. They are and will continue to be popular
- P. Keep the podcasting with Ancient Faith Radio, the daily videos with Orthodox360 and as many other social media venues as possible. It allows the Church as a whole (and other Orthodox Churches) to follow the Council and be a part of the Church. They are a huge hit.
- Q. Bring the relics and the museum. People greatly enjoyed them and they do not often have a chance to see and venerate these items. The same goes with the Sitka icon, St. Anne and any other such holy items. They add to the presence immeasurably.
- R. Pick a theme and stick with it as the planning for the Council moves forward. This is not always easy but it does provide for a link among the many elements.
- S. Strongly state and enforce that the Council runs from Monday evening to Friday afternoon. The lack of people at the last plenary session is inexcusable as there is business that needs to be done. People and parishes spend money to send delegates and they need to be there the whole time.
- T. Enforce the attendance requirement. It is in the Statute that all parishes need to send delegates and we only had about half of the parishes represented. It is mandated and needs to be enforced because this is a unique part of the life of the Orthodox Church in America.
- U. Local chairs should sit on meetings with the hotel staff in the early planning stages so that they can better understand that aspect of the Council.
- V. Local committee chairs should be put in contact with previous Council local committee chairs so they can share information and know what questions to ask. The same applies to Council vice-chairs and PCC members.

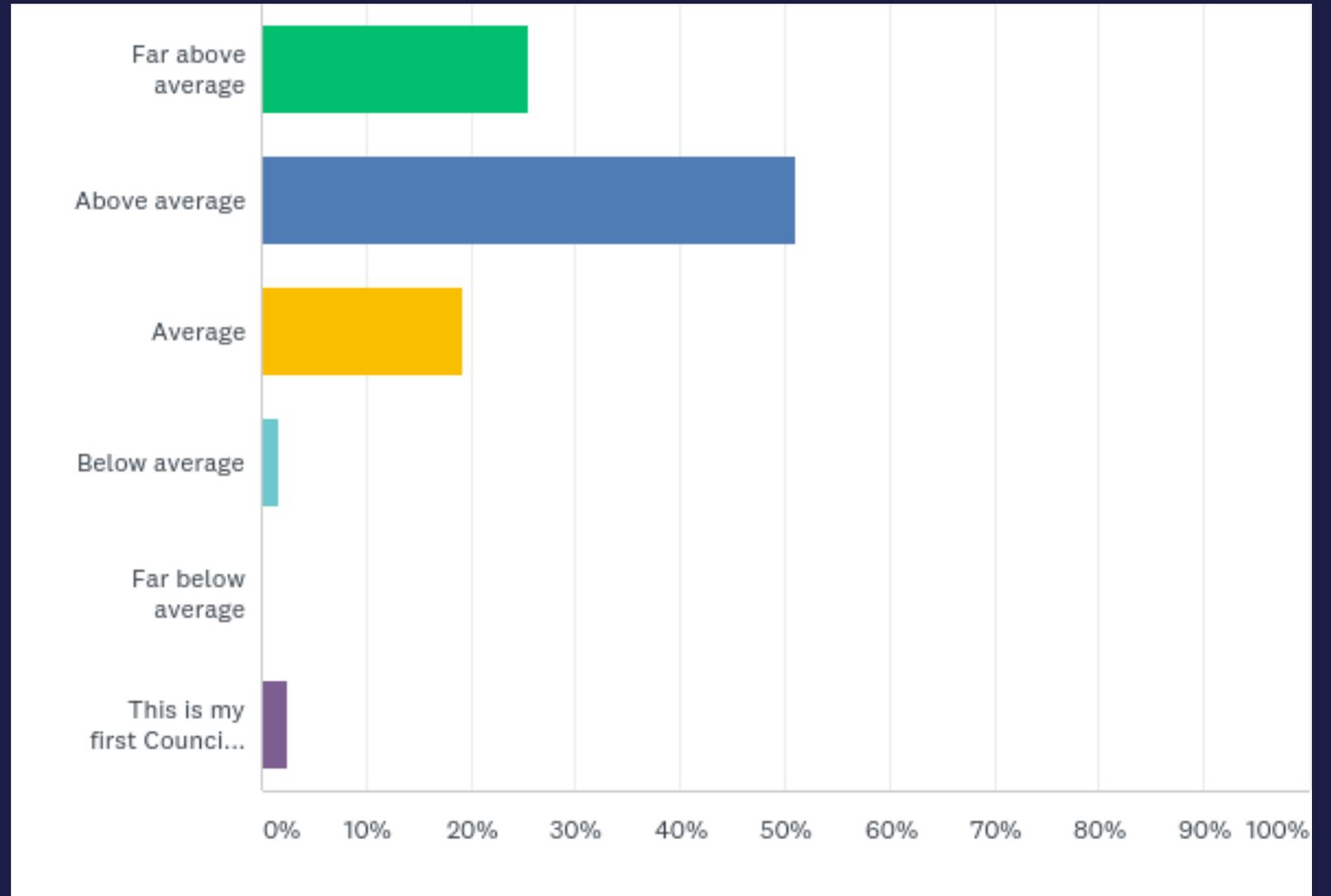
# 19th All American Council Survey

239 responses out of 760 emails

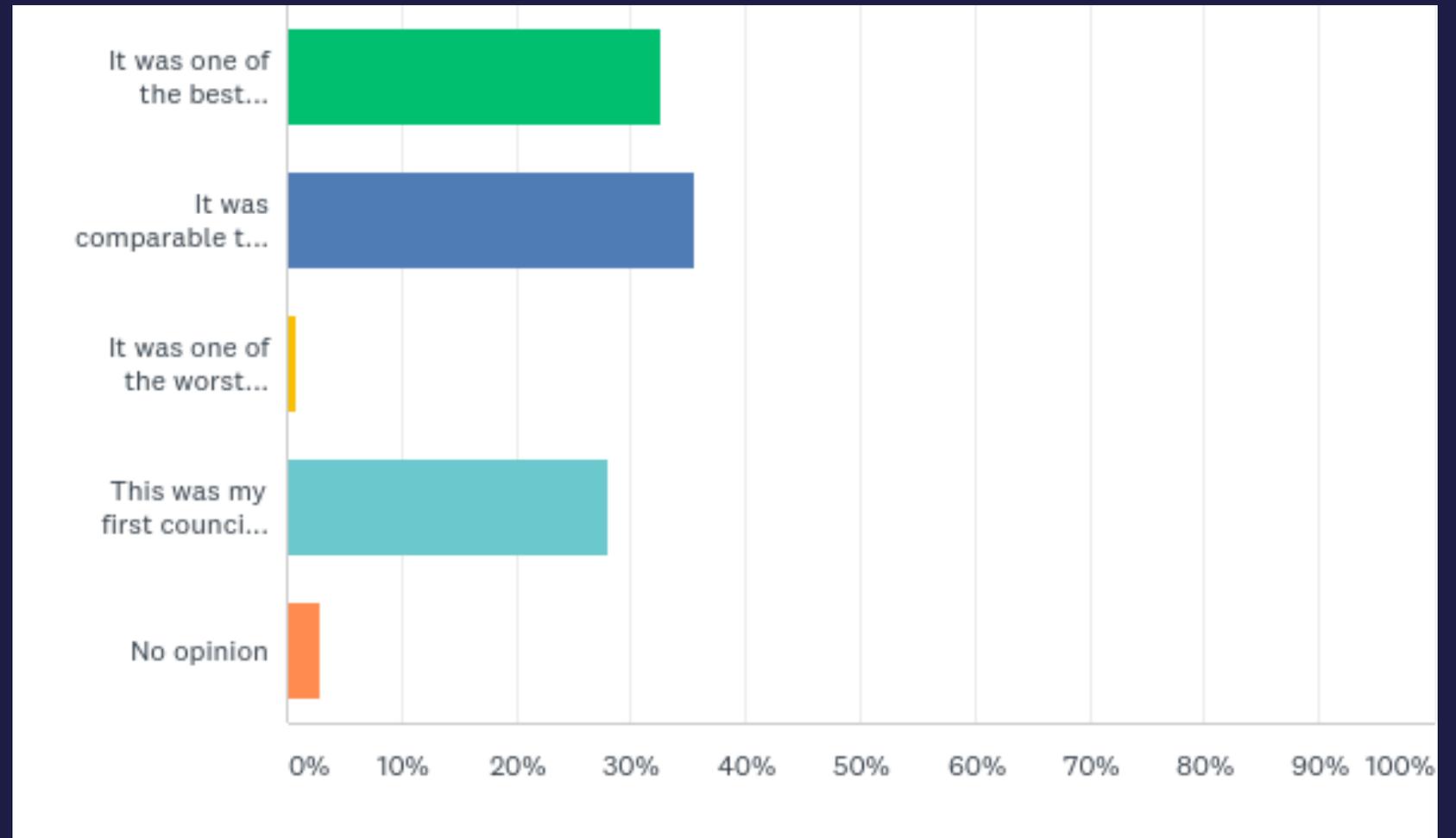


St. Louis, Missouri  
July 23-27, 2018

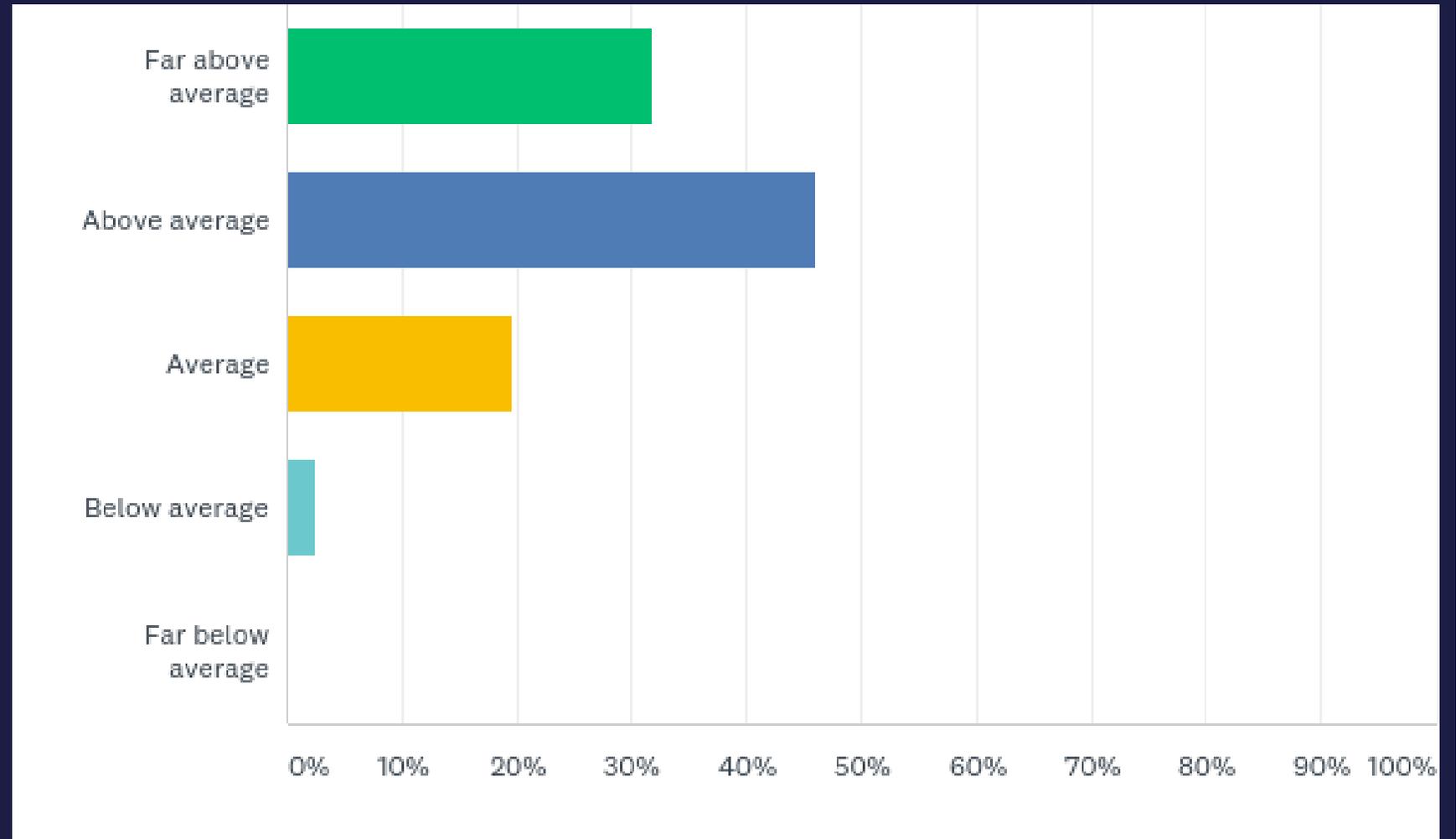
Q1: What was your overall impression of the 19th All American Council?



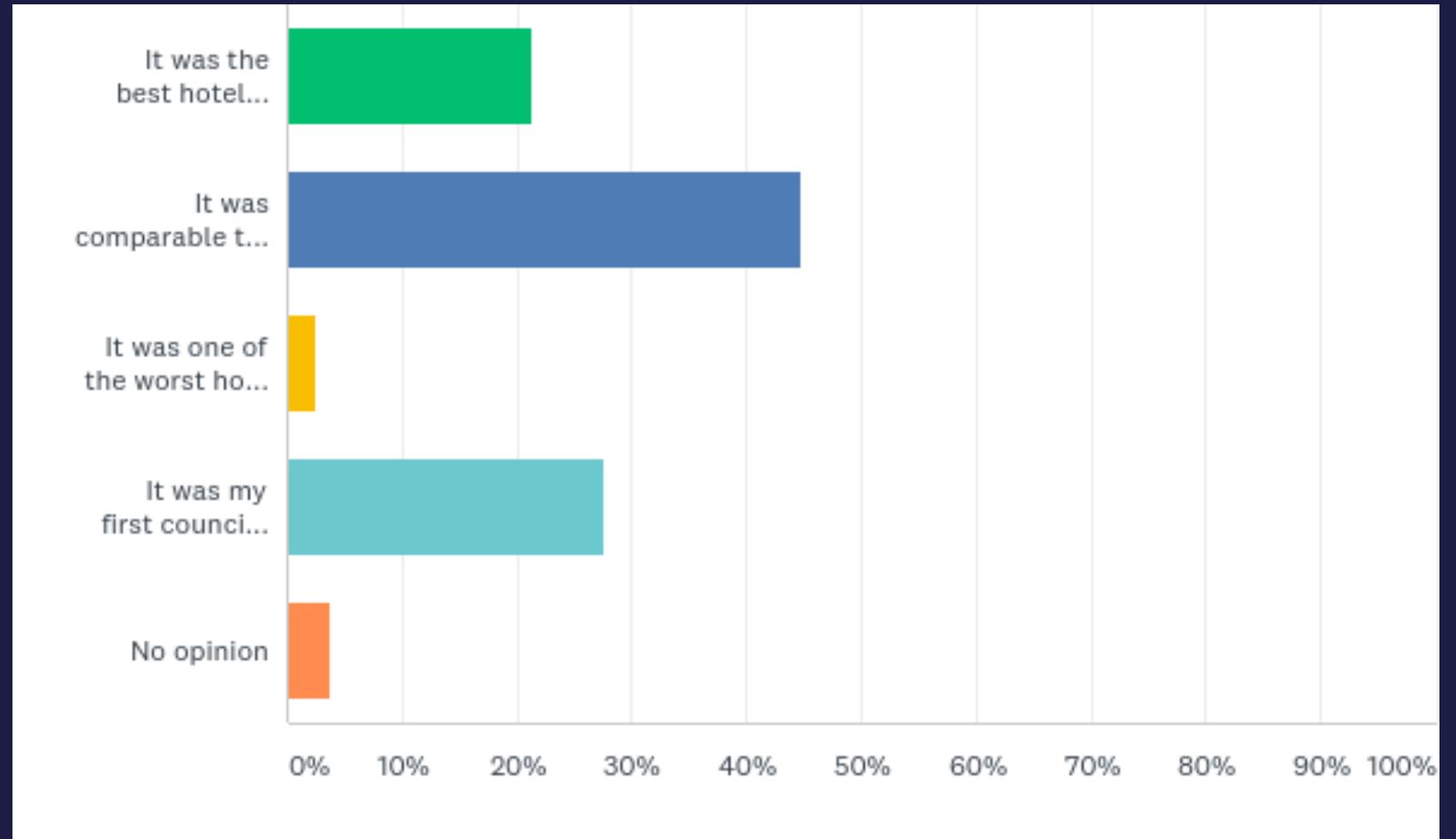
Q2: What was your overall impression of the 19th All American Council in relation to previous councils?



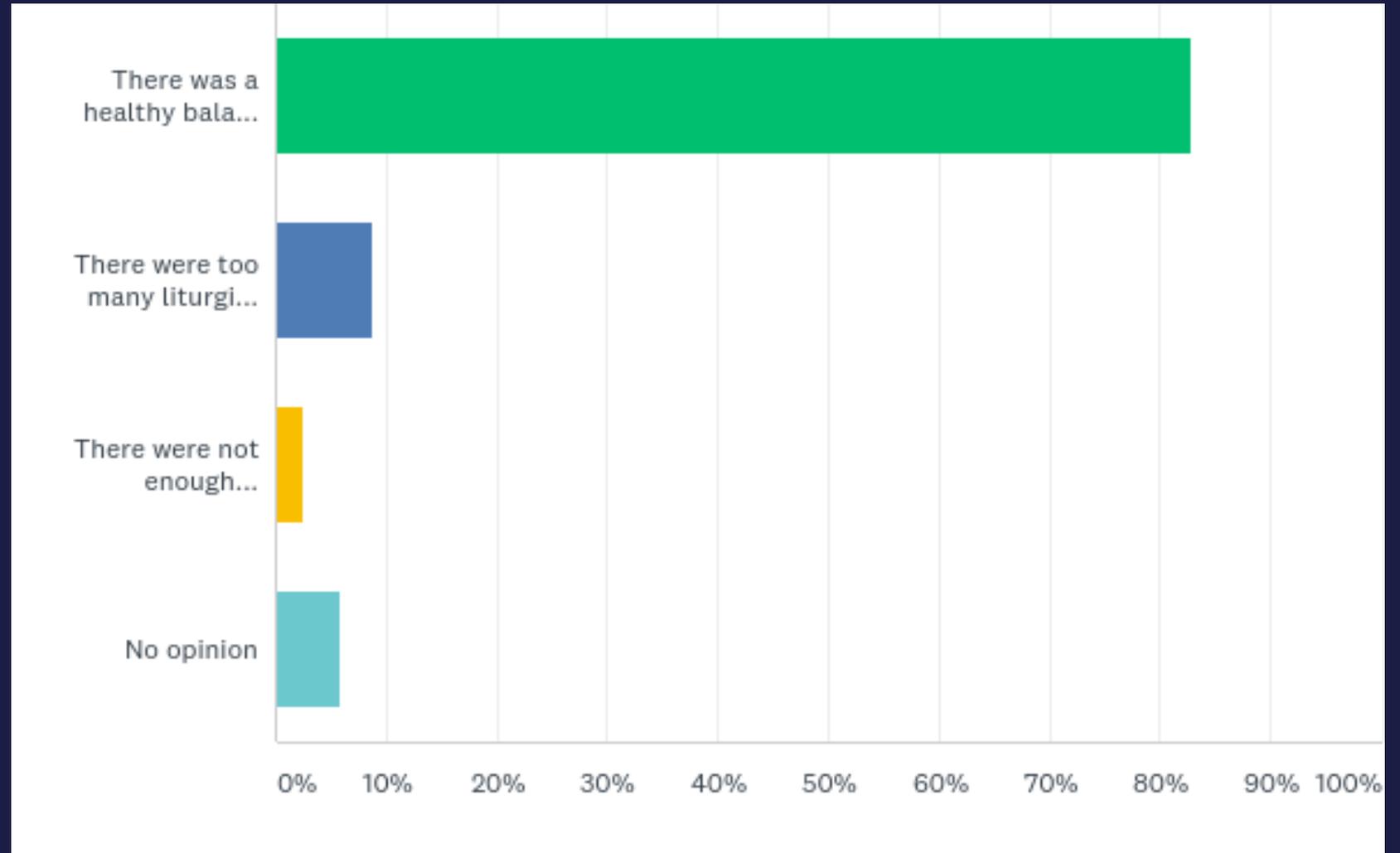
Q3: What was your overall impression of the St. Louis Union Station Hilton, the venue in which the Council was held?



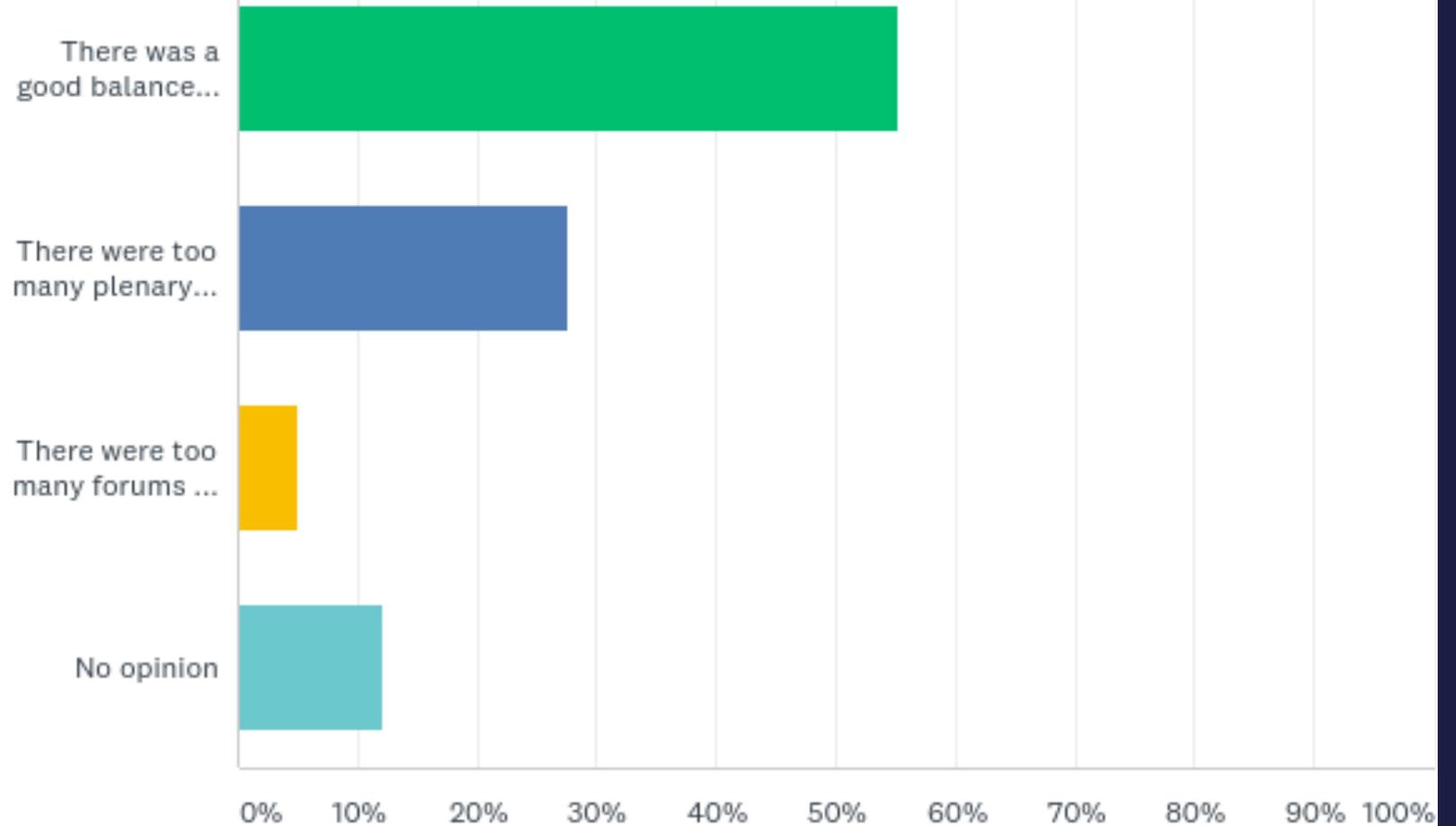
Q4: What was your overall impression of the venue in which the Council was held in comparison to previous venues?



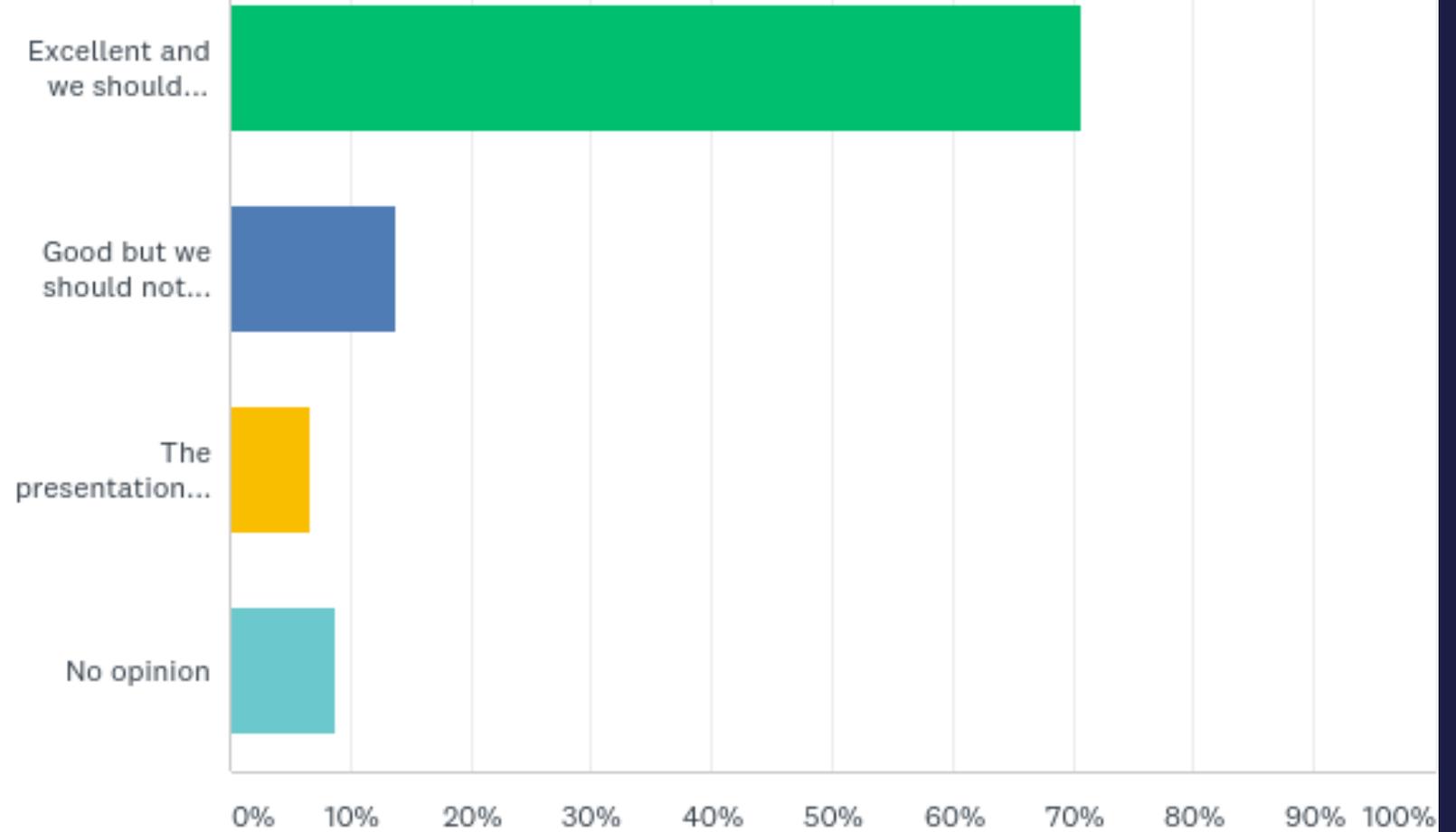
Q5: What was your overall impression of the liturgical services held during the Council?



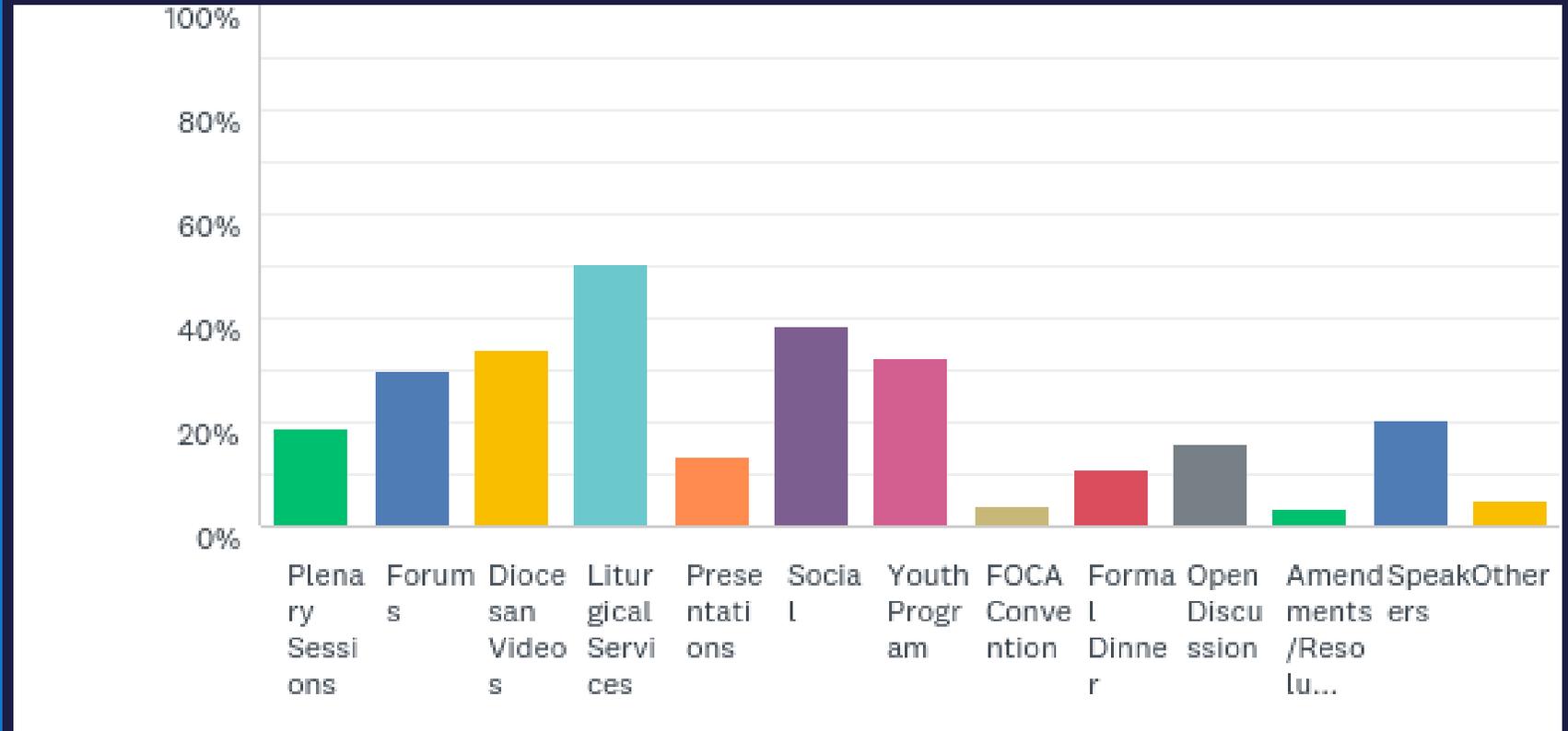
Q6: Please give your impression of the overall structure of the plenary sessions and forums



# Q7: What were your overall impressions of the Diocesan Videos?



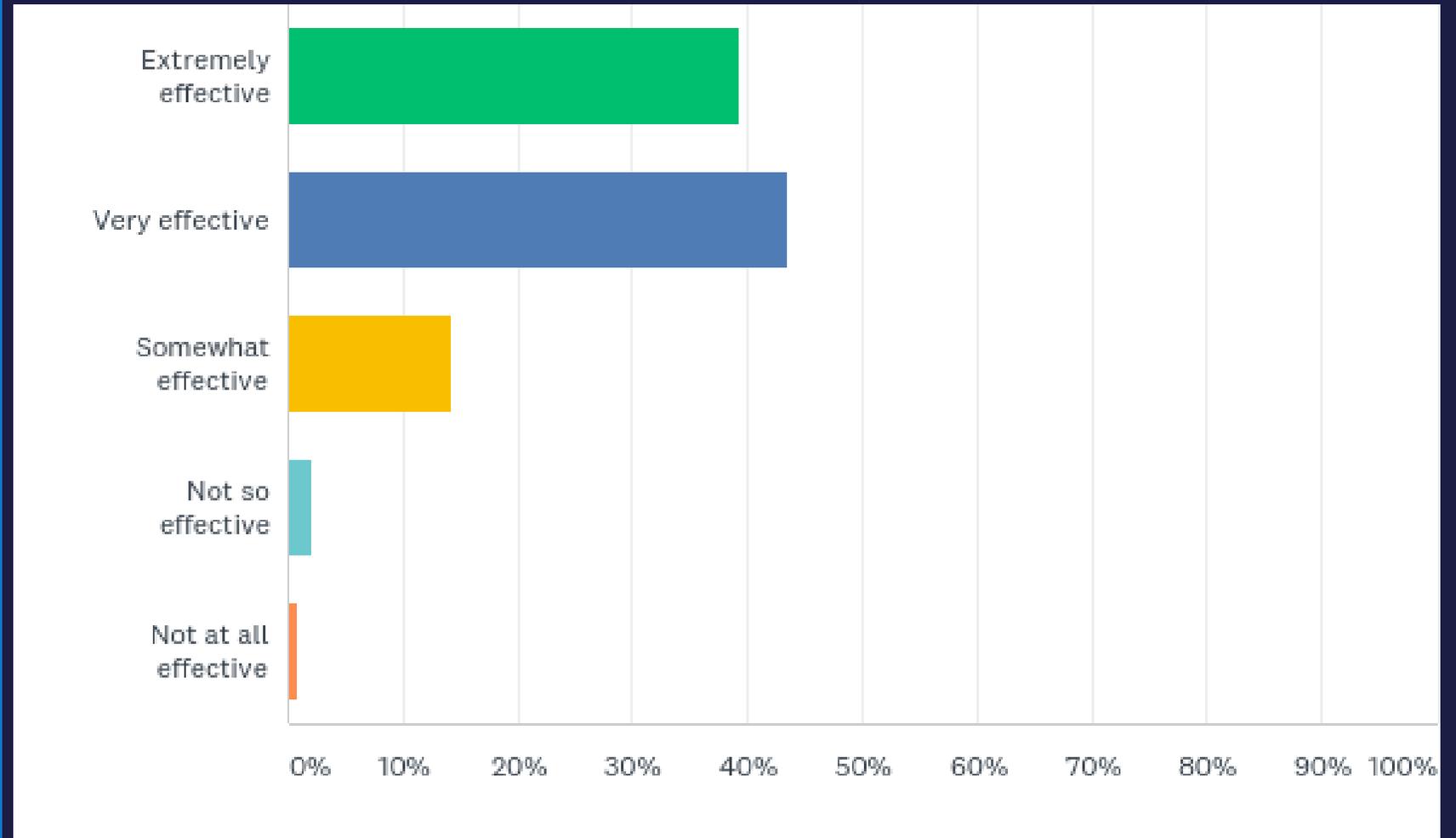
# Q8: What was the best part of the 19th All American Council?



# Q8: What was the best part of the 19th All American Council?

ANSWER CHOICES	RESPONSES	
Plenary Sessions	19.09%	42
Forums	30.00%	66
Diocesan Videos	34.09%	75
Liturgical Services	50.45%	111
Presentations	13.64%	30
Social	38.64%	85
Youth Program	32.27%	71
FOCA Convention	4.09%	9
Formal Dinner	10.91%	24
Open Discussion	15.91%	35
Amendments/Resolutions	3.64%	8
Speakers	20.45%	45
Other	5.00%	11
Total Respondents: 220		

# Q9: What was your overall impression of His Beatitude's Address?



# Q10: Please comment on the forums

Forum 1:  
Spiritual Li...



Forum 2:  
Spiritual Li...



Forum 3:  
Stewardship ...



Forum 4:  
Relation Wit...



Forum 5:  
Evangelizati...



Forum 6:  
Evangelizati...

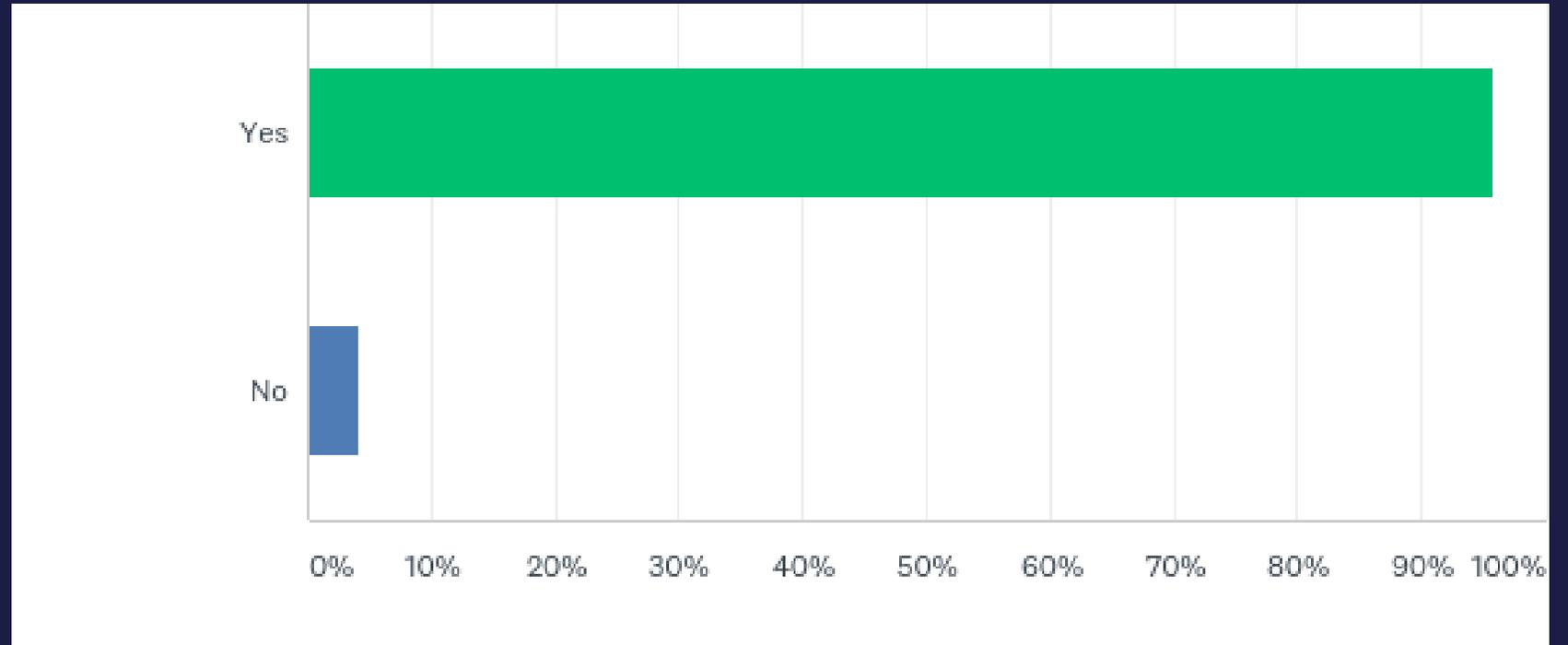


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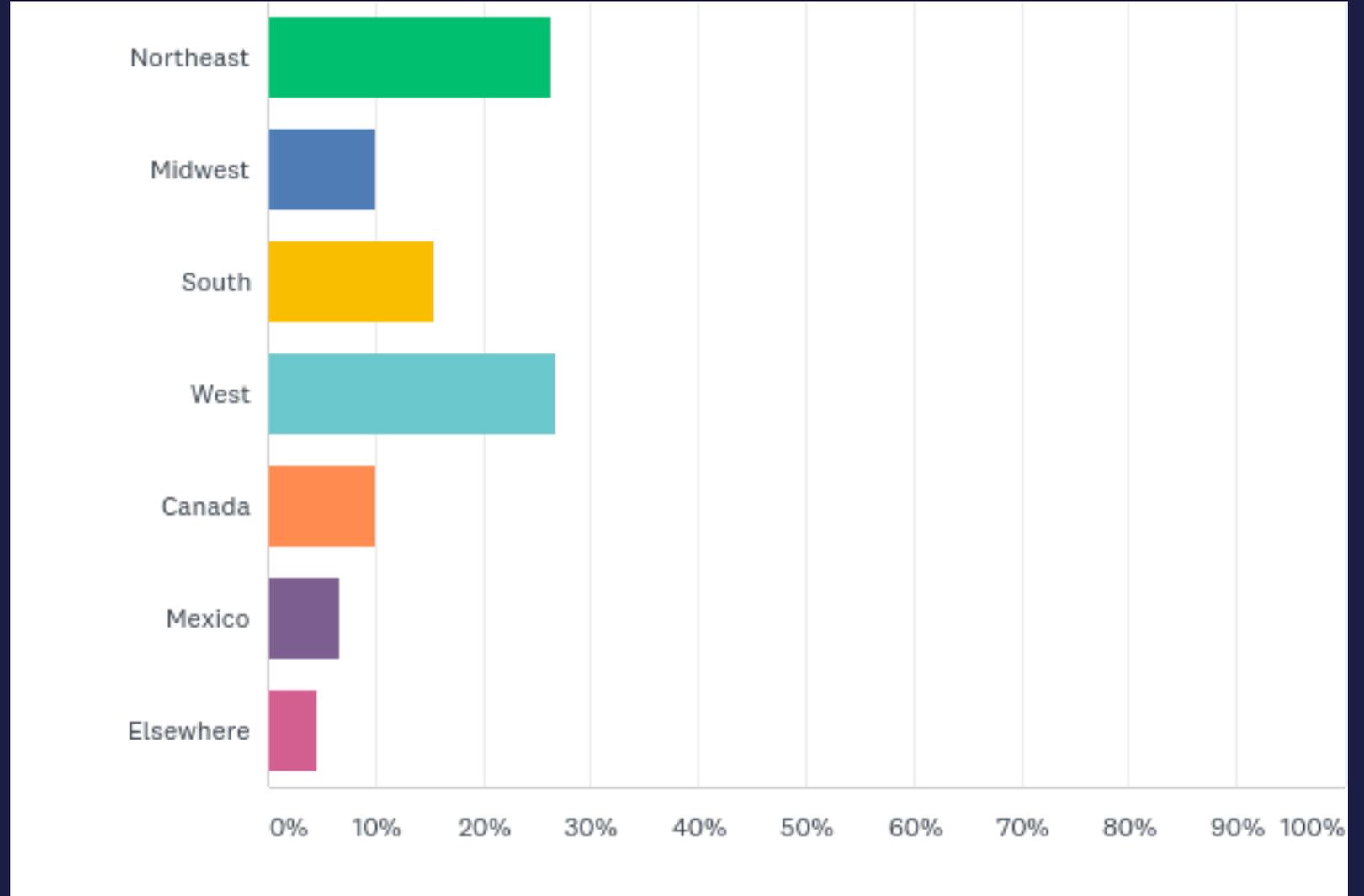
# Q10: Please comment on the forums

	VERY EFFECTIVE	EFFECTIVE	NEUTRAL	NOT EFFECTIVE	I DID NOT ATTEND THIS FORUM	TOTAL	WEIGHTED AVERAGE
Forum 1: Spiritual Life – How Can We Improve Our Personal Relationship to Christ?	14.53% 34	20.09% 47	8.55% 20	3.85% 9	52.99% 124	234	3.61
Forum 2: Spiritual Life – How Can We Better Care For Our Clergy?	4.20% 10	15.97% 38	6.72% 16	3.78% 9	69.33% 165	238	4.18
Forum 3: Stewardship – How Do We Properly Steward What God Has Entrusted to Us?	10.97% 26	11.39% 27	10.13% 24	2.11% 5	65.40% 155	237	4.00
Forum 4: Relation With Others – How Can We More Effectively Communicate And Interact With The World, North America, Non-Orthodox Groups and The Community?	4.60% 11	8.79% 21	11.30% 27	5.44% 13	69.87% 167	239	4.27
Forum 5: Evangelization – How Can We More Effectively Establish Missions and Revitalize Our Churches?	8.40% 20	14.29% 34	7.56% 18	2.94% 7	66.81% 159	238	4.05
Forum 6: Evangelization – How Can We More Effectively Reach Our Parishioners?	5.96% 14	9.36% 22	8.94% 21	3.83% 9	71.91% 169	235	4.26

Q11: Should there be a Youth Component for the 20th All American Council?



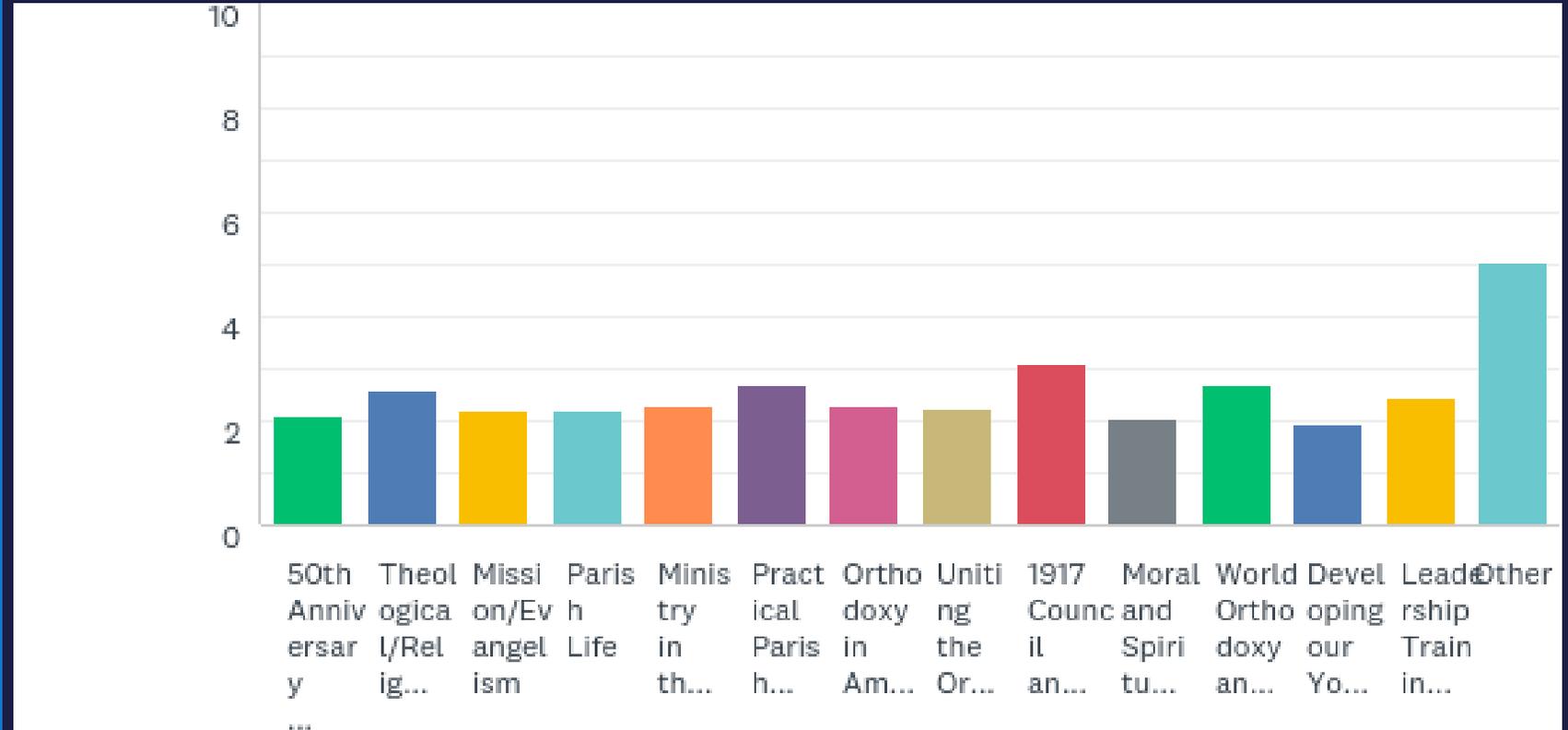
Q12: Where should the next All American Council be held?



# Q12: Where should the next All American Council be held?

ANSWER CHOICES	RESPONSES	
Northeast	26.36%	63
Midwest	10.04%	24
South	15.48%	37
West	26.78%	64
Canada	10.04%	24
Mexico	6.69%	16
Elsewhere	4.60%	11
TOTAL		239

Q13: Is there a suggested theme or topic that should be explored at the 20th All-American Council in 2021?



# Q13: Is there a suggested theme or topic that should be explored at the 20th All-American Council in 2021?

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	NO OPINION	TOTAL	WEIGHTED AVERAGE
50th Anniversary of Autocephaly and the Canonization of St. Herman	38.49% 92	29.29% 70	21.34% 51	6.69% 16	1.26% 3	2.93% 7	239	2.12
Theological/Religious Education	19.67% 47	33.89% 81	30.54% 73	6.69% 16	0.84% 2	8.37% 20	239	2.60
Mission/Evangelism	29.29% 70	40.59% 97	20.08% 48	5.02% 12	0.42% 1	4.60% 11	239	2.21
Parish Life	28.87% 69	43.93% 105	16.74% 40	3.77% 9	1.26% 3	5.44% 13	239	2.21
Ministry in the Community	25.94% 62	42.26% 101	21.34% 51	4.18% 10	0.84% 2	5.44% 13	239	2.28
Practical Parish Operations	17.57% 42	30.96% 74	32.22% 77	10.88% 26	1.67% 4	6.69% 16	239	2.68
Orthodoxy in America	25.52% 61	36.40% 87	29.71% 71	3.77% 9	0.42% 1	4.18% 10	239	2.30
Uniting the Orthodox Churches in North America	32.22% 77	31.80% 76	20.08% 48	11.30% 27	2.09% 5	2.51% 6	239	2.27
1917 Council and its effect on the Church in America	10.04% 24	22.18% 53	36.40% 87	17.99% 43	4.60% 11	8.79% 21	239	3.11
Moral and Spiritual Challenges in the Modern World	38.91% 93	35.15% 84	15.90% 38	4.18% 10	2.09% 5	3.77% 9	239	2.07
World Orthodoxy and the Place of the Orthodox Church in America	17.57% 42	33.89% 81	28.03% 67	10.04% 24	4.60% 11	5.86% 14	239	2.68
Developing our Youth and Young Adults	44.77% 107	32.64% 78	13.81% 33	3.77% 9	1.26% 3	3.77% 9	239	1.95
Leadership Training and Development	23.85% 57	34.31% 82	26.36% 63	7.95% 19	1.26% 3	6.28% 15	239	2.47
Other	0.00% 0	5.56% 1	22.22% 4	0.00% 0	5.56% 1	66.67% 12	18	5.06

## Q14 How could the All American Council be improved in the future?

Answered: 185 Skipped: 54

#	RESPONSES	DATE
1	Not have so much time devoted to the Departments explaining their role etc. but rather have more time for open discussion	8/27/2018 11:05 AM
2	There has got to be a better way to get presenters to be with in time limits. The length of presentations was ridiculous. The videos were good, but my wife and I enjoyed watching them at home. I loved the services, but the plenary and other sessions were problematic. There has got to be a way to build a thinner schedule to allow more time to get food and spend time chatting with friends.	8/26/2018 9:54 PM
3	1. have shorter meeting times. 2. Not have 6am services (see above) 3. The weeks leading up to the council, release each diocesan video as little teasers. 4. Have a few printed 'reference' copies of all the documents so that people who did not print can still view physical documents. 5. Need to have the banquet go on time. Speaker with course, speaker with course, MT reflecting during dessert, etc. If someone has a very long written document, better to have it included in the above booklet and not have it read at an event. This council should inspire us for the next x amount of years. Also, keep the fact that little kids are out till 11pm as our motivation to stay on time. other bishops should be able to reflect at different services instead of need all of them to speak at the banquet. I list the above because I love our Church (!) and want these events and all of your hard work to pay off in the parishes and our youth.	8/22/2018 3:44 PM
4	Give Department Chairs a specific agenda for their presentation: what have you accomplished since last AAC, what is your plan for next 3 years (within budget), what would you like to do if you had more \$. And limit their time to 5 minutes. We don't need to hear them repeat their written reports. We should also allow more time to debate resolutions. Although budget approval is not within the competency of the AAC, there should be more focus on what is in the budget and not in the budget related to needs of the OCA. This would drive home the need for funding the work of the OCA.	8/22/2018 8:25 AM
5	More vegan/fasting food availability.	8/18/2018 2:25 PM
6	A little more time to just sit and talk to people you meet. Running over on plenary sessions with shortened breaks made it difficult.	8/16/2018 12:03 PM
7	A dynamic featured speaker rather than foreign hierarch's speeches. Also, the scheduling was too tight. When plenary sessions went over, it cut time from the forums.	8/15/2018 7:59 PM
8	If some of the reports were submitted as videos, time limits could be better controlled.	8/15/2018 7:50 PM
9	Plenary session speakers need a time limit. The report on monasticism should simply be a brief video presentation on the monastic communities.	8/15/2018 10:46 AM
10	More input from laity	8/15/2018 2:01 AM
11	There was no time to even see St. Louis. Maybe have one afternoon free so that delegates can at least see the city it is in.	8/14/2018 1:47 PM
12	Be realistic when setting the timeline for plenary sessions, forums, and other events. Setting a schedule for sessions we know will run overtime is not helpful.	8/13/2018 1:30 PM
13	I think it was wonderful this year. Wish it happened every year!	8/13/2018 9:39 AM
14	Tightening up some (many?) of the speaker presentations and leaving more time for questions and discussions. Selection of dynamic speakers.	8/12/2018 9:25 PM
15	I think things went very well!	8/12/2018 5:43 PM

16	The challenge of so many people eating lunch on a short lunch break, or standing in line for morning coffee and breakfast. There were literally 100's of people needing to eat at the same time. The food trucks were not able to serve such a crush of people all at once. They ran out of food. And I felt that the priests were put in a humiliating situation waiting in the hot sun to get a sandwich or some sort of food, or nothing that they really wanted by the time they got to the truck. I can only imagine how challenging it is to feed so many in these short time frames, but I hope more options can be available next Council.	8/12/2018 2:09 PM
17	Have services in a large cathedral...a dedicated, Orthodox worship space.	8/11/2018 10:32 PM
18	I appreciate the suggestion of Archbishop Benjamin, of having meetings of clergy for social purposes only, taking place between AACs. It is difficult balancing social, liturgical, and business needs of the council in a single week. Encouraging clergy to get together with seeing each other as the main end, and serving the services together, would be a real boon.	8/11/2018 7:07 PM
19	Shift governance to treasurers/chancellors council/Metropolitan Council, and transition AAC to a parish life gathering. This council does not really govern this church. Let's stop pretending it does and get on with using the time for education/fellowship/problem solving. Any governance has been choreographed out of this gathering.	8/11/2018 5:30 PM
20	The one problem with the Union Station Hotel in St. Louis was the lack of nearby, affordable places to eat.	8/11/2018 2:19 PM
21	Speakers need to be kept to their allotted time -- also between the plenary sessions, forums, and even listening to speeches at the banquet, there was hardly any time to do anything else. Also -- Diocesan videos were great but perhaps a bit long...	8/11/2018 12:38 AM
22	use less expensive venue, explore college campuses. Union Station was very spread out for a hotel (I'm glad, however, that it was restored.)	8/10/2018 9:46 PM
23	It's not necessary to have each Department repeat what was contained in their written reports.	8/10/2018 6:53 PM
24	More time for questions/ discussion	8/10/2018 4:25 PM
25	More Q&A sessions. Banquet should not have speakers but allow participants to socialize with attendees	8/10/2018 12:21 PM
26	Shorten the plenary sessions by restricting the time given for department reports	8/10/2018 11:29 AM
27	The spirituality forum was not as practical or as well organized as I had hoped, and there was no time for questions.	8/10/2018 9:53 AM
28	Allow native Alaskan elders to influence council proceedings. The incarnation of the faith in their tribal culture has produced many saints and should influence how we meet in general council.	8/10/2018 9:50 AM
29	Maybe have an initial forum for first time AAC delegates as a guide to what to expect and why the AAC is important. By providing certain materials earlier so that reports and study guides may be read over a period of several months.	8/10/2018 9:32 AM
30	Leave a day open to spend with the youth.	8/10/2018 8:16 AM
31	the youth is the future.	8/10/2018 8:13 AM
32	More free time for visiting with each other.	8/9/2018 10:24 PM

33	<p>Glory to Jesus Christ! In my humble opinion, I thought the forms were an excellent idea, and should be continued, but, I believe they could/should have been handled a bit differently. As a retired teacher, I had expected the forums to be done in the same manner as schools have been handling discussion groups for quite some time now. This might have been what was done in other sessions, but not in the ones I attended. I believe that there was a very good introduction to each of the four pillars and what was expected, that is, to pray and study about them beforehand, and then bring our preferably written ideas to the forums. At the beginning of the forums, I expected an over-all introduction and brief review of the topic/s once again. Then, I believe we should have divided into several small groups and given an approximate time period where the people in the groups would contribute their various ideas. Once the time was over, each group would summarize its ideas and an appointed "Group Secretary" would have taken notes, and during the remaining time, each group would hear the ideas of each respective group so as to see if there might be a common thread of thought concerning old ideas, but still good; new ideas that should be tried, and possibly others that still need some fine tuning, to be discussed in the future. That way, everyone in the assembly leaves with a common sense of what was discussed, things that may have been done in our neighboring churches in the past that were both "worthy" of continuing, or perhaps should be considered dropped. I applaud His Beatitude's initiative on this manner of sharing our common goals. I pray that I have not offended anyone by this thought. While I heard some people speak on the topic/s, sometimes, as would happen in large group situations, someone may take up most of the time on his/her one idea, while all the others just listen, not being able to fully add to the discussion, not present another thought or question. Also, since this was my first time attending an AAC, and I don't know if you usually follow up with a survey like this, may I say that this was a great idea. I was considering writing about this very thing, but wasn't sure to whom it should be addressed and, therefore, would most likely lose the initiative to write anything at all. Thank you for this opportunity, and may you continue all your good work...For the Life of the World! Glory to God for all things!</p>	8/9/2018 10:10 PM
34	Allow more time for discussion and addressing issues among participants.	8/9/2018 10:04 PM
35	Longer breaks/lunch times. The lunch trucks helped but there still were long lines and people were rushing to eat.	8/9/2018 8:55 PM
36	More sessions, time to meet and talk with people from throughout the OCA	8/9/2018 8:21 PM
37	For the forums: There were two sessions. Some groups thought they would have the same audience both sessions -- in this case they presented the full first session and looked for discussion in the second. Clarify expectation for both presenters and participants.	8/9/2018 7:24 PM
38	In the AAC Packet for items that we are going to be voting on please put reason why we should vote yes and reason why we should vote no. This will give us the pros and cons of what we are voting on and I believe this will help to focus or even limit the people speaking about "for" or "against" and item because the best reasons for and against and the logic behind them has been present already.	8/9/2018 7:18 PM
39	Make the schedule not as tight.Allow some free time. Add another day for Plenary and do not schedule end time at 10 p.m.	8/9/2018 3:11 PM
40	The plenary sessions could be broken up a bit. Four hours is a long time to go without even a 10 minute break.	8/9/2018 2:02 PM
41	Plenary session time could be more efficiently coordinated	8/9/2018 6:49 AM
42	Doing a great job.....	8/9/2018 1:11 AM
43	Where possible, the OCA Website should have an "after the Council" follow-on; with easy access to all materials shown at the Council that could be shared with all parishioners during Sunday coffee hour, in other appropriate educational venues, etc. "Bringing the Council Home" would not only show the Church in action, but also might reveal how our lives could be affected by the example of other parishes and dioceses that have effectively accomplished their witness as communities and individuals.	8/8/2018 11:28 PM
44	The plenary sessions are important (and fairly-well-run in my view.) I think more time with the forums would be helpful. Also, I would like to see us try to include young adults and even interested parishioners in the AAC--making it perhaps more like the Antiochian Parish Life Conferences (which include things like Bible Bowl and Oratorical Contests for youth.) My aim is to strengthen and broaden the AAC--not to weaken it in any way.	8/8/2018 9:13 PM

45	Don't always exclude the western states as the venue. After all, it's a place of less developed and newer parishes and the financial impact for mandatory attendance is in the thousands. Not to mention what might be possible for the alaskan clergy. One council in the west (Seattle), in my 30 years as a priest.	8/8/2018 6:36 PM
46	Don't over schedule it. Don't have all the officers give oral versions of written reports. Instead invite questions on the written reports and keep moving. Don't insist on a keynote speaker unless you get someone engaging. And only have that person speak.	8/8/2018 6:17 PM
47	Shorter presentations, more interaction in the forums. Time for reflection was on the schedule, but there wasn't very much time!	8/8/2018 5:40 PM
48	Much, much more time should be left open and unscheduled so that participants have adequate opportunities to be together without feeling as though they are "playing hookie".	8/8/2018 5:27 PM
49	Shorten by a day or two in order to offset some costs of every 3 year event vs 4 year event.	8/8/2018 4:59 PM
50	Less business and plenary sessions. Most of these could be done online ahead of time. Less appeals for money from the various OC orgs. (We as Priests get these weekly updates and appeals and know more about these organizations than the presentations) More social interaction times. More deep spiritual talks about cultivation of our life in Christ. More offered times for quiet reflection. More time to view vendors. More time for Priests to relax and reflect. Make the cost to attend lower by renting out or buying a retreat facility, college campus or alternative to a hotel.	8/8/2018 4:36 PM
51	Too many agenda items in plenary sessions putting us behind. Speakers, videos need to stay within allotted time given to speak.	8/8/2018 3:17 PM
52	Have all the plenary sessions in one day and 1 to 2 days for breakout sessions, limit the length of council 5 days is too long. More social events other than the banquet	8/8/2018 3:02 PM
53	More accessible venue. This hotel was good but too long distances to walk from one place to next. Easy to get lost in place.	8/8/2018 2:56 PM
54	Diocese videos were good but could benefit from some standardization and a time limit. Could replace the reports as well. Be cautious about speakers who tend toward monotonous speech patterns and/or who are too keyed to written text; very hard in groups of hundreds to sustain attention in the face of those elements.	8/8/2018 1:24 PM
55	No opinion	8/8/2018 12:54 PM
56	Forums were a good idea, but the ones I attended and ones I heard about ended up being a series of speakers/lectures with very little time for interaction with attendees' Q&A. Increase the Q&A in the forums with a panel of experts, but the experts do not each need to give a lecture.	8/8/2018 12:50 PM
57	Have tonsured readers read at services. Meet at a consecrated church. Clearer purpose: is the a business meeting? Let's get the business done--streamline, and cut what is not to the point. Is it meant to be a family life convention like that of the Antiochians? Then build up the youth and family component. Is it meant to be business and education? Then let's get some good topics of real benefit to priests: Hearing confessions and applying the canonical and Scriptural remedies of the Church; Clergy taxes; Teaching classes in the parish; Scheduling services in the parish: what constitutes a full liturgical schedule for a parish; the priest's prayer rule; the priest and his own confession/relation with spiritual father; current moral issues created by the development of technology: contraception, end of life questions (when do you pull the plug?), ministering to those who think they are of the other sex, counselling those who want to use every available means to "get pregnant", etc. Let's have some profoundly good speakers like the Antiochians always get: Elder Zacharias of Essex, Met. Hierotheos Vlachos, Fr. Maximos Constans. Let's have some good interaction with another national church. What are the Russians doing? How can we learn from them? How can we help them? What are the Greeks/Georgians/Albanians/Romanians doing? etc. Let's build some bridges to our brethren in other lands. It was good to have Archbishop Leo of Finland, but I did not appreciate his water-carrying for the Patriarch of Constantinople.	8/8/2018 12:20 PM
58	Limit the time for presentations.some were too long with little content therbycutting others short that were interesting	8/8/2018 11:57 AM
59	All the sessions need better planning beforehand. The care of clergy session unattended felt like a number if good ideas were stuffed in a shotgun shell and fired, hoping something stuck.	8/8/2018 11:47 AM
60	more fraternal congctact with clergy	8/8/2018 11:32 AM

61	<p>First, please have bathroom breaks as part of the plenary sessions. I'm guessing there are plenty of us "older folks" who take blood pressure medicine and we can't sit for three to four hours without a break. The hall passes were silly and unnecessary. Secondly, don't assume that everyone has a smart phone, computer, or tablet: the documents referenced and discussed at some of the plenary sessions were not included in the binder we were given. One of the ladies (two of which were not the most personable!!!) informed me that it was assumed that each person would print out the materials and put them into the binder should they choose to have a hard copy. As a result, a large number of people sitting around me did not have documents to look at. Please, make the documents to be discussed available in hard copy. Third, at times the presentations devolved into that particularly American habit one sees at award ceremonies and in corporate meetings where people have to thank this person and that, tell us their personal trials and tribulations, or praise so-and-so. It takes time, detracts from the subject at hand, and seems like a way for some of the speaker's to celebrate themselves or simply hear themselves talk. The meeting is about the life of the Church, not a self-help seminar about how to be successful. Fourth, it would have been nice to have more sessions devoted to spiritual matters -- the threat of technology; cultural changes regarding sexuality; the dangers of the Internet; what kids are picking up from music and TV; Hollywood's war against Christ; can a Christian fight in today's wars; how should a family pray together; challenges of mixed marriages; how should the Jesus Prayer be incorporated into one's prayer life; how should converts be educated or churching, etc, etc, etc. These sessions should be an hour long with maybe a 20-30 minute presentation and the rest of the time set aside for questions or a panel discussion. Fifth, it would have been nice to have "mixers" so lay delegates and clergy could have an opportunity to meet and talk outside of the planned sessions.</p>	8/8/2018 11:18 AM
62	Provide adequate time between functions. Food venue, places to eat, were not adequate.	8/8/2018 11:11 AM
63	Time limits on reports and speakers to fit the schedule	8/8/2018 11:06 AM
64	shorten plenary materials. too much to download, read, then hear again. simply can't sit that long or focus on that amount of information.	8/8/2018 11:02 AM
65	Make sure there is an abundance of good food options within walking distance - more than just food trucks	8/8/2018 10:21 AM
66	more down time to enable people to see the displays and yet not miss the forums or plenary sessions.	8/8/2018 10:02 AM
67	<p>I appreciate the liturgical emphasis of the Council, but I think it is stretching the attendants too much to have an All-Night Vigil and a 3.5 hour hierarchical liturgy within the course of a very busy schedule. I love church and liturgical services, but the hierarchical liturgy could have been shortened (especially re: communion, with more efficient management). Also, I enjoyed the diocesan "promo" films but they can avoid the difficult questions our dioceses have to face. What about declining census numbers? Instead of having to admit these facts to the assembled body of the Council, the dioceses get to show a 10-minute advertisement for how wonderful things are.</p>	8/8/2018 9:33 AM
68	<p>I thought that the food situation was difficult. We seemed to be behind schedule and would then have to wait a long time for meals. I also thought there were too many speakers at the formal dinner, that they spoke for too long and that the translations were painful. I can only listen to translations for a short period of time before my attention wanders and I start bothering my neighbors.</p>	8/8/2018 9:31 AM
69	better time management for all speakers at all venues	8/8/2018 9:12 AM
70	<p>I used to attend professional conferences where corporations charge hefty fee (2-3k) for attendance. The AAC was as professionally organized if not better than those I attended before. Most of all I enjoyed my time at the conference. It was a blessings for me to venerate the Icons. It's incredible. Thank you and God bless.</p>	8/8/2018 9:10 AM

71	<p>First let me say thank you to everyone who works so hard getting these councils together. There needs to be more free time I find it highly ironic that they always say go and explore the local area, go see museums or the local culture but there isn't built in "free time" to do that, the week is jam packed with workshops and sessions. Build in more free time, provide coupons or vouchers for discounted museum or cultural attractions. Also make it shorter, it is too long, most of the work for the week could have ended by Thursday not Friday. Make better use of time. Videos are fine but after a while we get the point, every diocese is diverse every diocese has their unique qualities. Must we watch videos every council? Talk about real bread and butter issues, how many seminars do we need about evangelism? Missions? What about clergy mental health, the real problem of shrinking parishes especially in the Northeast and Eastern seaboard. What about the lack of real ecumenism is our OCA compared with that of the 1970's and 1980's, or what about training future clergy in a different way, especially clergy for a vastly different 21st century church? I think its time that our OCA leadership take a real hard look at the current situation on the ground and deal with those issues and not bring out the evangelism, missions, and spirituality ones again. We all know that, every council talks about that, we need to look at the issues that are and will be effecting us in the near future.</p>	8/8/2018 7:46 AM
72	Keep to a realistically set schedule.	8/8/2018 3:54 AM
73	More organization. Roundtable discussions need more planning and focus.	8/8/2018 2:02 AM
74	I don't think St Louis was the best fit for the AAC. There were few outside activities available to attendees. With few exceptions, the "locals" didn't seem particularly friendly, although polite. There should be better information about safe transportation options to and from the Airport.	8/8/2018 12:23 AM
75	More eating places. They used to have continental breakfasts.	8/8/2018 12:14 AM
76	The event was extremely well put together. Even though there was a lot packed in each day, I believe it was the perfect use of our time. The forums were great as well. I would recommend putting some focus on the lay people in attendance in each forum as well to ensure they are fully involved in the discussions.	8/7/2018 11:41 PM
77	Don't make all the decisions prior to us coming.	8/7/2018 11:03 PM

78	<p>As a lay delegate, the opportunity to attend has broadened my perspective on many facets of the OCA and pan-Orthodox organizations. Most of the plenary material could/should be fed to the delegates ahead of the sessions. [videos, summaries, etc]. Large printouts of documents are unlikely to be read by the majority of the attendees, and yet for some information, there isn't a more effective mode of dissemination. Understand that many people will be functioning on "information overload" almost from the beginning. Getting it out early where it can be consumed piecemeal over more time allows for preparation and frees up "together" time for other things. A long time ago I read a book called "Say it in 6". It proposed that if you couldn't have your meeting in 6 minutes, the topic of the meeting was too broad, and the list of attendees was probably too large. It doesn't perfectly apply here, but aspects of it do. FOCUS with Intent smaller chunks of attention span for your attendees. It also proposed that if you weren't going to create and take action items from the meeting - a meeting was unnecessary. Create one central repository for the collection of paperwork, video, training sessions, URLs for related material. While pulling together a high level review for my church with a subset of video content, I searched the OCA website, the AAOC website, Facebook, Diocesan websites, and in one case, shipped email to find out where a video was because searching didn't find it. "The OCA website" wasn't sufficient - the links from the homepage led me to news articles, but not "everything". Same with FB and the AAOC site. Perhaps the priests are used to finding their material and how the national organization "thinks" - but lay delegates won't necessarily.. Long videos lead to loss of attention span. People (like me) "check out" and move on to other things. The desire to communicate fails, the desire to attend wains. LIMIT the time for anything in a Plenary - provide a KISS venue to locate secondary information for those wanting to know more. A small pictorial directory of "who is who" of those presenting/running for office/stepping down. As a first time delegate, and, to be frank, so far, a tumbleweed within the church - I couldn't remember names OR faces even if I wanted to follow up and have a conversation over something presented. The two forums I attended could have been awesome, but I feel they suffered from crammed timelines and potentially overcrowded speakers. Spiritual Life on day one had 7 presenters (I think). Each individual worth listening to, but we were left with almost no time for questions or clarifications, and no time for any in depth exploration of specific aspects. The second just flat ran out of time. Many ideas were transmitted with "sound bites" - "Be the church" for example. If that phrase isn't expanded and explained, it really has very little specific meaning - it is open to re-interpretation by the hearer. Given that - neither forum presented me with much I had not already heard, read, or been told before. Doesn't mean they were worthless, I am frequently a slow learner. So - forums - EITHER they are presentations by speakers OR they are DISCUSSION venues for the attendees, but not specifying, mixing, or leaving it up to the organizer w/o clear guidelines - degrades both formats. Food - if the vendor's had been warned that the majority of the attendees would be fasting Wed/Friday, their menus could have been adjusted and all would have benefited. I thoroughly enjoyed the opportunities I had to interact with other attendees, the monastics, our bishops, and members from the pan-Orthodox organizations. I did purchase some things from the vendors. St. Louis station - beautiful venue. Very pricey rooms. I stayed off site. Many people commented there was "nothing" around it.</p>	8/7/2018 10:43 PM
79	<p>Fewer days would decrease expenses. More compact scheduling could expedite the church business issues. We need Liturgical Music training and practice sessions; laity need to have knowledge and understanding of Church music of the liturgical calendar, what choices are available, what translations, and how to sing these selections in services, including Vespers. Also, a physician-led required seminar speaking to clergy about physical health and well being is long overdue. Perhaps health screenings such as blood pressure checks could be available. It is quite obvious to those of us Orthodox healthcare providers that many priests and bishops are overweight, addicted to tobacco, and are perhaps, in their roles as "spiritual health providers" in need of a health check up and discussion of good health practices. Having such a seminar could give these "spiritual doctors" encouragement, and would underscore the importance of caring for one's physical health.</p>	8/7/2018 10:35 PM
80	<p>Strictly limit time of speakers on departmental and other reports - the written reports are already available</p>	8/7/2018 10:20 PM
81	<p>Keeping the time schedule</p>	8/7/2018 10:19 PM
82	<p>having the Hierarchs monitor the forums was a great start, we need more interaction with them. Have a little more down time. If you go to services, all sessions and forums it's intense</p>	8/7/2018 10:12 PM
83	<p>Sessions on liturgical music - training and performing</p>	8/7/2018 10:11 PM
84	<p>Shorter, less speeches at formal dinner.</p>	8/7/2018 10:10 PM

85	Since the department reports are available to the delegates, perhaps each of the presenters could make their talks brief and to especially avoid repeating the written reports during the plenary sessions.	8/7/2018 9:52 PM
86	Shorter liturgical services, more realistic time allowance for the plenary sessions, enough time to have lunch and socialize and still have time to attend the forums.	8/7/2018 9:35 PM
87	More social time. Breaks in plenary sessions.	8/7/2018 9:28 PM
88	This was my first one and I thought it was great.	8/7/2018 9:23 PM
89	Have a couple of two minute breaks to stand and stretch during the plenary sessions. For the break out sessions suggest making them shorter by only having 2-3 speakers max and allow for more discussion/sharing. Some of the speakers weren't focused and rambled. Would like to have been able to attend more sessions so making each shorter would allow time to attend 2 per day.	8/7/2018 9:22 PM
90	couldn't get into forums / due to capacity	8/7/2018 9:04 PM
91	By holding the ACC on a cruise ship you would save money. Five day cruises are very reasonable..food is included	8/7/2018 8:55 PM
92	The forums need a more controlled, standardized format. For example, they could begin with a 30-minute expert presentation, followed by a 30-minute panel discussion, followed by questions and answers from the audience.	8/7/2018 8:34 PM
93	plenary sessions should have timed components to keep the flow, interactive parts that allow for movement. Way too much sitting and talking.	8/7/2018 8:28 PM
94	Timing, timing, timing. Be more prepared for sessions that run long. In Thursday's Liturgy, Priest/Deacon Communion took 45 minutes, so Liturgy will not be done in 2.5 hours. Also, move the banquet speakers that the center of the room. It was terribly difficult to focus on a speaker so far from the back of the room.	8/7/2018 8:22 PM
95	Time management.	8/7/2018 8:04 PM
96	If department reports are available ahead of time, only changes or one or two major highlights should be given by speaker. Reports were too long. Also, there was too much preaching in the reports both from departments and organizations such as IOCC, etc.	8/7/2018 7:41 PM
97	Time allotted for questions and discussion in forums and presentations in plenary sessions. Banquet shorter program. Friday morning delegates are leaving or have left missing presentations. Refocus the last day of events to earlier in the weekdays. Ensure that presentations are not what's already in the written reports. Avoid redundancy. Business session was done in one day avoid filling the remainder of Council with videos and have more open discussion in plenary on major concerns and issues facing the Church in the 21st century to include external relations, Unity of Orthodoxy in America what's status of Canonical Orthodox Bishops in America, how to ensure clergy and family health in our Churches, Overall thanks to the Chancery staff for their outstanding work.	8/7/2018 7:31 PM
98	Adequate time for attendees to ask questions at both plenary and forum venues. Shorten the banquet program. Keep your speakers and presenters on a strict time limit. Limit the business at the last day of the council. Many of attendees had left the night before, during the last day session. If you are going to have the hierarchical liturgy and banquet on the same day, make sure the major business of the council has been concluded. Schedule evening sessions.	8/7/2018 7:31 PM
99	Please improve on the forums. I don't believe the speakers were prepared or planned out their sessions very well.	8/7/2018 7:26 PM
100	Parishes should not ask their delegates to pay for their travel expenses (travel and lodging).	8/7/2018 7:11 PM
101	Let Sheehan direct misc	8/7/2018 7:10 PM
102	Shorter and less frequent	8/7/2018 6:54 PM
103	Such a minor item, but the opening prayer we sang was on paper at every table. It could have been on the big screen for those who didn't know it and would have saved paper and printing.	8/7/2018 6:38 PM
104	No more department reports!!!!!!!!!!!!!! Let us just read them and allow a short time for questions. They were comparable to Chinese Water Torture.	8/7/2018 6:34 PM
105	We need a "singles" mingle dinner for the Orthodox people.	8/7/2018 6:30 PM

106	It would be great if the hotel and the meals in the area were not so expensive. Otherwise I genuinely believe it was very well done this year.	8/7/2018 6:22 PM
107	better access to restaurants/coffee shops in walking distance	8/7/2018 6:22 PM
108	There were an overwhelming number of reports and presentations, with most speakers speaking far, far too long when a written report had already been made. It should be limited to FIVE MINUTES per speaker. Most of the plenary sessions were a waste of time. There is no need for person after person to get up and preach a twenty minute sermon on the work of his organization. Similarly, in the forums, there should be a strict limit on the amount of time each person is given to speak. There is simply too much talking and not enough time to absorb. FINALLY Wednesday is a fast day in our church. How can we give a one hour break for lunch and provide virtually no fasting options for people? I found that to be particularly discouraging.	8/7/2018 6:07 PM
109	Keep to the time restraints on the schedule	8/7/2018 5:57 PM
110	No opinion	8/7/2018 5:37 PM
111	Once every three years the church comes together, and it was disappointing to me that nothing (let me emphasize: nothing) of substance was discussed. The diocesan videos were little infomercials and didn't focus on the health of the Church. We didn't talk about an Orthodox response to societal issues or engaging the world. The forums were much too long: after sitting for four hours in the morning, a three hour session is too long. Suggestion: give one hour over to social time and then give two one hour forum sessions. But honestly, if you don't make these councils substantive, no one wants to go.	8/7/2018 5:33 PM
112	Speaking in addition to presenting a video is redundant and should be discouraged. Also, limited speakers from non-OCA organizations to no more than ten minutes at the podium - or present a short video.	8/7/2018 5:25 PM
113	I would suggest assigning a time for the Friends of Bill W. Just having the room open all day meant people could have comedy and no one be there.	8/7/2018 5:24 PM
114	The hotel room we had, and ones which others had, had black mold. It made me quite ill as I have asthma.	8/7/2018 5:22 PM
115	-before council....involve the parish that sends the delegate by sending videos before AAC. Give the parishes time to to evaluate ministries it may be interested in and priests/delegates to connect with. This would allow those not attending to understand the importance of AAC, feel engaged, and to help AAC feel like a catalyst in the local parishes. -Removing the videos would allow more time for breakout sessions, rest, priests have a family night out with their children (really how often do priests get vacation in a fun city on their budget), or a reception for delegates to network after a day of ministry breakout sessions (some are 1st timers others are old timers both with wisdom and joy) - Have breakout sessions/forums 45 min/hour rather than forum/plenary sessions. Recommendation of sessions with panels of priests/delegate of various ministries. For example, a session about nursing home ministry led by those with thriving ministries. How to begin, pitfalls, joys, successes, etc. This could provide a missing link where parish with desire need discipleship to occur. These panelist could then provide contact support or have a facebook page started for each ministry forum. -Involve those who understand the need for balance in attention span and refocus (brain learning). There are many things that are packed into one week. However, after 30/45 minutes of a plenary, many people become distracted. Simply asking everyone to stand and turn to someone near them and mention one thing they gathered from the last 30 minutes and how it applies to them or their parish would increase the number of takeaways from each moment throughout the AAC. -I previously marked too many services. I'm thankful for the cycle of services; however, the schedule needs to be evaluated so the schedule is adhered to. Delays in the schedule are difficult for those with diabetes, pregnancy or other health needs. -There are many things other Orthodox jurisdictions do well, and some non-orthodox conferences that do things we should learn from as well. -Also ?#13... Discipleship as a theme of topic applies to many of these choices. There are many gifts and talents in our parishes that lay to waste past the walls of each parish, when through zoom or other modern tech (done well) could increase discipleship. I'm happy to follow up with any of the comments at a later time. jcfinc@gmail.com	8/7/2018 5:00 PM
116	The schedule must have been crafted by a Type A personality...no breathing room! No time for reflection, networking, leisure, sightseeing. The business that was conducted could have been accomplished in half the time.	8/7/2018 4:58 PM
117	More Breaks with coffee /water/snacks during sessions Some time to visit outside venue compound A communication Hub to find out scheduled rehearsals/events places and times the day before Don't repeat written reports...use videos with future goals	8/7/2018 4:55 PM

118	Reports from departments need to be brief, with the main points up front.	8/7/2018 4:52 PM
119	A better plan for informing first time delegates on what to expect.	8/7/2018 4:51 PM
120	More free time for social interaction by holding one and not two forum sessions	8/7/2018 4:44 PM
121	Concentrated organization at Divine Liturgy. Procession to Holy Communion very disjointed this council	8/7/2018 4:33 PM
122	Many sessions ran overtime due to very long presentations. Perhaps the schedule could be more flexible to accommodate overages. It would have been nice to have a little more social time built in to the schedule. It was a wee bit too packed. There were far too many talks at the banquet. I would limit banquet address to one. This way one can actually say hi to the other people at the table and share our experiences of the week.. especially since it was our only chance to be social! :) The liturgical services and choir (esp. the majority of the early morning services) were very "man-heavy" and not very welcoming for female or "not-professional yet very capable" singers of either gender. It's not like only men or professional musicians were elected by parishes to attend the event. The choir rehearsals weren't posted, and communication was poor. A certain clique of STOTS affiliated singers were not following the choir directors and arrogantly acting like they knew better... even singing the women's parts over the women. Very unbecoming. In the same vein, I felt the male monastic presence was a bit much for the mixed audience of this church event. It created an unfriendly atmosphere those early mornings.. almost elitist in a weird sense. However, the nuns were wonderful, humble, gracious. If daily Divine Liturgies are scheduled next council, I suggest they be more parish-life-like and inclusive, not monastic and exclusive. Having an Akathist afterwards is too much. Just do one service at 7am - either a liturgy or an akathist, but not both.	8/7/2018 4:33 PM
123	Better ways of getting something to eat, very few choices to none at this one!!!!!! ☐	8/7/2018 4:29 PM
124	The plenary sessions were definitely the most tedious part of the AAC. If they had kept to the time, they would have been endurable, but most, if not all went over. It is not rude to ask someone to stop talking when they go over their time limit - it is rude to go over your time limit. Breaks would have been appreciated. Also, when there are surprise visiting clergy and church representatives, I understand the need to acknowledge them publicly, but that can be handled in a way that is both respectful, and brief.	8/7/2018 4:24 PM
125	An session of 'open discussion' with the clergy and hierarchs on 'pastoral concerns'.	8/7/2018 4:11 PM
126	Participants need more time to get meals between sessions. I ended up missing forums and sessions because I had to wait so long to eat.	8/7/2018 4:11 PM
127	Provide opportunity to explore the city/region in which the Council is held.	8/7/2018 4:02 PM
128	Presentations should not devolve into a platform for soliciting financial support	8/7/2018 3:54 PM
129	Do not invite guests to the sessions: hierarchs, priests, laymen, etc. They will only tell others what came out of it and this will give our church a bad reputation. Liturgical Services? Yes. Formal banquet? Yes, but not the sessions.	8/7/2018 3:53 PM
130	Quit vesting the Metropolitan in public. It's anachronistic and It detracts from the central purpose of the Divine Liturgy!	8/7/2018 3:53 PM
131	I believe that in order to streamline the plenary sessions, all video presentations should be given strict time slots. I think that this would both streamline the sessions and help avoid the problem of the sessions flowing over and disrupting other elements of the Council.	8/7/2018 3:37 PM
132	I think the AAC is trying to *be* too many things. Let the AAC be for the plenary/business sessions (making decisions for the church) and then have a conference that complements and implements those decisions by *equipping* parishes to do these things. Themes are generally dropped once the AAC is over. A follow up practical conference on implementing the theme is essential.	8/7/2018 3:31 PM
133	Replace the forums with actual plenary sessions. Then there will be more time to discuss reports and nominations. If there has to be a topic for each AAC, the topic should always be Christ and mission. That would eliminate the need for breakout sessions on sundry ancillary topics. More time can also be freed by requiring dioceses to hold their assemblies at a time other than the AAC, and in locations actually inside their dioceses. The All American Council is, per the Statute, the "highest legislative and administrative body within the Church." Unless that statutory language is changed, the AAC has to act like it is the highest legislative and administrative body within the Church. Currently, real power is held by the Synod but accountability for decisions can be ascribed to the AAC due to the statutory language. Either give effect to the Statute, or change the Statute to reflect reality.	8/7/2018 3:30 PM

134	1) Whatever happened to Matins? I can see one Akathist one morning, esp. if you have something like the Sitka icon, but I felt this was a large liturgical oversight. 2) I felt removed from the center of town and therefore with fewer dining/social options. Maybe that was intentional, but I found myself with time on my hands and not much to do with it.	8/7/2018 3:16 PM
135	More camaraderie among our brother clergy	8/7/2018 3:13 PM
136	Don't read the reports to us. Give ppl time to get out and explore city. Have AAC in lower crime city. No sweltering temps.	8/7/2018 3:12 PM
137	Keep Plenary Sessions running on time. Maybe schedule forums first and then Plenary Sessions in the afternoon.	8/7/2018 3:11 PM
138	More organized communication. On the second day the forums started 45 minutes late because of the plenary- which was fine- but the delay wasn't communicated well and a lot of people arrived on time and had to wait almost an hour without knowing what was going on. Of course, it was announced at the end of plenary, but not everyone stayed for the whole time; as a lay person, I wasn't as interested in staying for the entire plenary.	8/7/2018 3:06 PM
139	Starting sessions on monday during day, not evening. Have forums in one evening and/or morning	8/7/2018 3:04 PM
140	The week is quite intense. A mid-week free time would be nice to recharge.	8/7/2018 3:01 PM
141	More on the spiritual and liturgical life. Fellowship and building relationships among those in attendance. Try to make it more of an event for the entire church by trying to get more observers to come and participate. I wish I could have had my entire parish in St Louis. Most of all, limit the amount of time people have to speak at the banquet and perhaps even vet the content of their presentations.	8/7/2018 2:59 PM
142	Some free time to visit or even sightsee.	8/7/2018 2:51 PM
143	Emphasize more the work in the dioceses, less a Syosset or some other central administration vision of the work of the Church. Including also a less seminary-centered sense of theological education, but rather to emphasize the work of theological education done out in communities, colleges, and diocesan programs when they exist.	8/7/2018 2:47 PM
144	more relaxed schedule; do not give the microphone to people who do not know how to speak effectively in the time allotted to them	8/7/2018 2:39 PM
145	More down time to connect to fellow clergy/communities	8/7/2018 2:38 PM
146	Keeping on schedule	8/7/2018 2:38 PM
147	No comment	8/7/2018 2:36 PM
148	Fewer reports given at the microphone. Everyone should read the reports and presenters merely ask for questions.	8/7/2018 2:36 PM
149	Starting sessions on time	8/7/2018 2:33 PM
150	Some speakers must prepare better	8/7/2018 2:30 PM
151	Lower cost for spouses and family, childcare for children 2-7... No need to have non-voting members sectioned off by a rope and made to enter a side door	8/7/2018 2:21 PM
152	Maybe holding it in Alaska.	8/7/2018 2:17 PM
153	Schedule the time so that it was not so compressed. For example, limit the speakers so that they have not more than a few minutes since everyone should have already read their reports. Give more information regarding the candidates for election at the beginning of the council so that there is enough time to make a knowing vote. Maybe receive a packet of information with the packets at the registration booth.	8/7/2018 2:16 PM
154	More free time to socialize with other clergy and lay persons. Forums where there is less speaking and more round table discussions between parish reps.	8/7/2018 2:08 PM
155	Keep plenary sessions to schedule. If there is a video let the video speak. Not video plus speaker. Offer opportunity for questions but not time for a speech.	8/7/2018 2:08 PM
156	Fewer days, not as expensive	8/7/2018 2:03 PM
157	Not enough free time between sessions/forums, not enough cushion time because plenary sessions and liturgical services always ran later than anticipated.	8/7/2018 1:59 PM

158	1. The departmental/ministry reports that have been submitted and published in the handbook should stand on their own. If there are questions, delegates should be given an opportunity to voice them, and then department chairs can address the council. 2. Beside the officers, and His Beatitude, those who are given time to speak should be limited to 5 minutes. 3. Nominations to church wide office should be conducted at the registration area, with forms available; as well as a computer/kiosk for delegates to print off forms. Nominations close on Tuesday, nominees announced and published on Wednesday, with election on Thursday. 3. No more than 1 speaker at dinner, with a time limit of 10-15 minutes. 4. Some thought should be given to how clergy Communion is organized, especially at the Hierarchical Liturgy on Thursday.	8/7/2018 1:57 PM
159	Do not let Fr. Leonid Kishkovsky speak. It was horrible!	8/7/2018 1:54 PM
160	More vendors and space for vendors. LESS EXPENSIVE TABLE FEE FOR VENDORS. Vendor room that can be LOCKED at night. SHORTER hours for vendors. Ten pm WAY too long to sit there. Could not go out to eat. Or socialize. More restaurants within walking distance of hotel that are reasonably and family priced. If you didn't have car you were stuck in hotel all day. Hotel with more accessible elevators more centrally located to rooms	8/7/2018 1:54 PM
161	Cheaper healthy eating options!!	8/7/2018 1:50 PM
162	Keep events and formal dinner on the same level as this year. Formal dinner was outstanding.	8/7/2018 1:49 PM
163	The schedule was too packed. There was no time to eat, use the rest room, take care of necessities. It was difficult to obtain reasonably priced and healthy food.	8/7/2018 1:46 PM
164	Youth presentation was exemplary. It was inspiring, succinct, and the right length. I believe all the presenters could learn from the youth presentation. They should only provide an executive summary of those reports...that's one page folks.	8/7/2018 1:46 PM
165	More down time, especially in youth program. More just Matushki events, more meals provided with more time to enjoy the food and fellowship	8/7/2018 1:46 PM
166	Change the OCA Statute to reflect a representation from each of the dioceses, not necessarily representation of each parish and mission. Two-day business meeting for this smaller group every 4 years with added "parish life" conference, and/or "parish life conference" every (other) 2 years rotating around the dioceses. The schedule is just too busy to get real work done. The forums, presentations, youth component, and social interaction are all really important, and could be accomplished with the "parish life" conference portion of the meeting.	8/7/2018 1:44 PM
167	More time and encouragement for questions and discussion at forums and plenaries. The delegates need to be more engaged, not just listening to and receiving reports.	8/7/2018 1:34 PM
168	No oral reports from the Assembly (SCOBA) organizations; they can present written reports. Briefer reports from departments; they can be a short (3 minute) opportunity to simply highlight the written reports.	8/7/2018 1:33 PM
169	The plenary sessions need to be more compact without an endless of parade of department presentations that already exist on paper.	8/7/2018 1:30 PM
170	If the Metropolitan Council or the Synod proposed resolutions, please provide an explanation as to why they are proposing them.	8/7/2018 1:12 PM
171	Make it clear at registration when the opening sessions will start. Some folks thought Mon. morning but it was evening.	8/7/2018 1:12 PM
172	excellent	8/7/2018 1:08 PM
173	Do not read reports. Allow more conversation from the floor. Scrap format of forums, and make them into true working sessions (that means have the experts there, but LISTENING not talking.)	8/7/2018 12:49 PM
174	Videos more concise Reports submitted ahead of time and only questions, if any, be addressed Keep vigil especially for N American saints	8/7/2018 12:47 PM
175	Venue in a safer neighborhood and fewer and shorter plenary sessions.	8/7/2018 12:43 PM
176	Limit the themes of discussion at the Plenary Sessions or add an additional Plenary Session.	8/7/2018 12:40 PM
177	It would be nice if wives of clergy didn't have to pay to be an observer	8/7/2018 12:39 PM
178	No reports of departments or forums should be summarized during sessions. At most, speakers should give three sentences selling the Council on why their report is really important. The Continuing Ed report has been especially terrible the last two Councils.	8/7/2018 12:37 PM

179	Allow a little more free time for families to sightsee	8/7/2018 12:33 PM
180	More realistic timelines on the agenda - every AAC, we're behind schedule. Either compensate by lengthening the schedule (e.g., the Pontifical Divine Liturgy always takes more time than scheduled, but can't be shortened), or make people stay on track (e.g., the speakers always take more time than scheduled, and usually only present what was already in the written report that was distributed prior to the Council, so shorten their times).	8/7/2018 12:28 PM
181	Find a better way to explore a venue, they are too expensive.	8/7/2018 12:19 PM
182	More organized plenary sessions. Time limits for the speakers. Video presentations out side of plenary sessions.	8/7/2018 12:16 PM
183	N/A	8/7/2018 12:08 PM
184	1.) 3 days vs 5. 2.) 4 hour Divine Liturgy is too long 3.) One speaker at the Banquet 4.) Better food options for breakfast and lunch 5.) Stay on schedule. 6.) Smaller and more forums. Less plenary sessions with reports	8/7/2018 12:06 PM
185	Keep to a schedule. Better planning. Interesting content rather than showboating.	8/7/2018 12:03 PM

## Q15 Any additional comments on the council?

Answered: 156 Skipped: 83

#	RESPONSES	DATE
1	Enjoyable, but again, we have to build in a bit more free time and restrict people on presentation lengths.	8/26/2018 9:54 PM
2	I list the above because I love our Church (!) and want these events and all of your hard work to pay off in the parishes and our youth.	8/22/2018 3:44 PM
3	Great work by the Chancery and the local committee to put on this great event!!	8/22/2018 8:25 AM
4	I was very happy with It.	8/18/2018 2:25 PM
5	Would suggest gathering the first to me delegates on the first day for a meet and great. I felt a little lost and alone at times.	8/16/2018 12:03 PM
6	I love attending the councils because I always take something positive back that I can apply in our parish and I come home spiritually renewed.	8/15/2018 7:59 PM
7	Keep the oral reports to s limit!!!!!!!	8/15/2018 10:46 AM
8	no	8/15/2018 2:01 AM
9	Some session went too long	8/14/2018 1:47 PM
10	In future, when councils take place in neither of my dioceses, liturgical commemoration should be as bishop of Dallas, the South and the Bulgarian Diocese	8/13/2018 1:30 PM
11	No	8/13/2018 9:39 AM
12	Excellent Council. The hierarchs representing the other autocephalous Orthodox Churches were a big plus for showing church unity and the 'acceptance' of the OCA	8/12/2018 9:25 PM
13	I'm glad we are keeping it every three years. I head many comments about how impressed the hotel staff was with our presence at the hotel.	8/12/2018 5:43 PM
14	Gratitude for all the work that is put into the prep, during and follow through.	8/12/2018 5:06 PM
15	I would suggest the daily Liturgy be held at 7:00 and preceded by the Akathist at 6:15. I believe more would be able to participate in the Liturgy if it began at 7:00am	8/12/2018 2:09 PM
16	It was beautifully done.	8/11/2018 7:07 PM
17	Many thanks to the planners and volunteers. This council ran beautifully from a logistics perspective, agenda notwithstanding. Also, the daily Liturgy, the Vigil, and the Services were uplifting and inspirational. To hear a choir like that gives a mission something to shoot for. Many lay members might never hear anything like that in their churches in their lifetime. And it seemed to be a healing time as well, worshipping in unity, whatever one's position on more worldly topics. More of this please!	8/11/2018 5:30 PM
18	no	8/11/2018 2:19 PM

19	Over all the council was wonderful! Thank you to all who put in countless hours and labor to make it possible. To me the council is a window into the Orthodox world beyond our little corner. His Beatitudes address and the talks given by many others are inspiring as are the videos of what other archdiocese are accomplishing. Walking into a service where such a large body of people are worshipping together is a joyful experience. The council also gives us the opportunity to meet and see other clergy, clergy families and laymen that we would otherwise not be able to. In reference to my "not effective" review of the forum, How Can We Better Care For Our Clergy? The information offered was interesting and definitely has a place, however I think that I was hoping for something else and it colored my review. I had hoped that it would be more along the lines of what we can do to help and care for our clergy, practical ways to help ease their burdens. Clergy burnout is a huge reality, and while the groups of clergy getting together is a fabulous thing and has offered great results for those that are able to have such a group it is not something that will work across the board. There are clergy that serve their parishes and also have full time secular jobs to make ends meet. While all clergy need care, it seems that those most in need of care, help and r&r are those that have no time to be a part of anything extra. It would be wonderful to someday have a forum that could give constructive insight as to how we, as the layman or clergy wives, can help support and prevent burnout in the clergy that are not able to take a break. This just made me think of another idea for a forum, How to better care and support the Matushka and clergy families. As a Matushka I am seeing first hand the stress of my husband as he works full time and serves our parish to the best of his ability. This leaves very little time and energy for his family, which causes a huge strain on the children and myself. Thank you again for all that you do to make these councils possible. I have been blessed to attend two now, and both were wonderful!	8/11/2018 12:18 PM
20	Loved the hotel -- what a unique place!	8/11/2018 12:38 AM
21	I attended Forum 6 but it was on our relations with other Orthodox and non Orthodox churches and not on reaching our parishioners as described. But it was a good overview . Learned a lot. Have at least one sightseeing option for spouses.If it weren't for FOCA, I would have not seen anything in St. Louis (though I saw sights during the 1989 AAC when not a delegate or observer)) Diocesan videos should be time limited. AAC should end with the Thursday night dinner.	8/10/2018 9:46 PM
22	Make Friday a travel day and end the council on Thursday evening. Over 1/2 of the people were gone Friday morning.	8/10/2018 6:53 PM
23	The computer system used for registration could be improved substantially.	8/10/2018 9:53 AM
24	No	8/10/2018 9:50 AM
25	Although expensive the venue was exceptional and I would not mind another St. Louis Council. Limit morning services and start a bit later than 6 am. I like the fact that each afternoon was dedicated to forums with plenary's in the morning. I like dinner speeches but this year's lineup was a little long. Just limit a bit the length and number of dinner addresses. But in general a very nice Council. Thanks to everyone involved.	8/10/2018 9:32 AM
26	N/A	8/10/2018 8:16 AM
27	fantastic	8/10/2018 8:13 AM
28	I suggest a fund to enable more retired clegy to attend.	8/9/2018 10:24 PM
29	Yes, once you've "gotten me started". ;o) I Loved the Diocesan Videos, I also Loved the enthusiasm of some of the speakers, I Loved being able to meet my friends and family, some of whom I hadn't seen in years, and, for lack of a more formal way of stating this, I was absolutely "blown away" by the entire assembly singing at the sessions, and, of course, by the most beautiful and uplifting services that I attended! Again, everyone's hard work noted! God bless you all to continue the work you have begun. Sorry...one negative: Sessions ran overtime a lot, not allowing much time to catch a bite to eat or rest a bit.	8/9/2018 10:10 PM
30	Too much time taken up with videos with no time for discussion.	8/9/2018 10:04 PM
31	It would be nice for two clergy from each diocese to serve with the Hierarchs. And early morning liturgies served by different dioceses each day with monastics of the OCA.	8/9/2018 8:55 PM
32	It was friendly	8/9/2018 8:21 PM
33	I'm very new to Orthodoxy, and this was my first Council. I was pleased with the proceedings, the people, all of it. I am under the impression that people are pleased with Metropolitan Tikhon as well as the health of the OCA. Thank you!	8/9/2018 7:24 PM

34	During Plenary session the chair should have time for stretching breaks. Sitting for hours on end is not good for the bishops or anyone else and we need to more around to circulate blood and go to the bathroom.	8/9/2018 7:18 PM
35	Very spiritual and uplifting.Wonderful liturgical servises.Moleben for the Icons was scheduled too early in the morning, while the Plenary ended at 10 p.m.the previous night.We were unable to attend molebens.	8/9/2018 3:11 PM
36	Glory to God!	8/9/2018 6:49 AM
37	None	8/9/2018 1:11 AM
38	We are very fortunate to have His Beatitude, Metropolitan TIKHON as our Archbishop. His commitment to fulfilling his role as a visible witness for Christ was apparent at the Council. His calm, gentle, sincere and fatherly personality is respected by Orthodox and non-Orthodox wherever he witnesses for Christ. He is a worthy man and holds to the example of his namesake.	8/8/2018 11:28 PM
39	The venue worked and the planning was solid. I do think it's better if there are restaurants right outside the council. There were too few and the food trucks were a great idea. Places to sit down together and visit are needed. The AAC is my go-to for catching up with old friends (whom I need for basic support as a priest--this is a necessity not a luxury for me and my wife.)	8/8/2018 9:13 PM
40	The OCA is back on track with our two century vision of bringing Orthodoxy to America.	8/8/2018 6:36 PM
41	None	8/8/2018 6:17 PM
42	The diocesan videos were a nice flourish at the last AAC but have gotten a bit pro forma. If videos will be used, it should be limited to these diocesan reports exclusively--no more canned lectures from departments or speakers.	8/8/2018 5:27 PM
43	St. Louis was a good choice. Youth presentation was wonderful way to end things.	8/8/2018 3:17 PM
44	Would like to see the council no more than 3 days long	8/8/2018 3:02 PM
45	More social time appreciated.	8/8/2018 2:56 PM
46	Evident that significant hard work occurred to get the conference set up and running smoothly. Well executed and designed for the most part.	8/8/2018 1:24 PM
47	None	8/8/2018 12:54 PM
48	Great! Especially enjoyed, also, the vendor area and the ability to connect with Orthodox friends from around the country.	8/8/2018 12:50 PM
49	It was great having Vigil. It is nice meeting in the center of the country rather than at the peripheries, but something in the north and in a cooler clime would be nice. A couple survey questions here are problematic. Diocesan videos: they were nice. But should they be a component in future councils? I don't know. Mix of plenary sessions and forums. This depends on what the purpose of the council is: business? business + education? business + family life? Our purpose seems mixed. And I'm probably part of a cranky minority, but unless our vision is a family life conference, I question all the fawning over the youth. "Youth are the future of the Church! Youth are the present." These slogans grow trite. So why are the rest of us who don't qualify as youth around? It seems we are falling prey to the modern cult of youth. If this is a family life conference, bring the youth and go all out. If this is business, the youth need not be there. I am not a fan of youth programs and age segregation. I am a fan of the church body as a whole integrated and worshiping and living together across the generations.	8/8/2018 12:20 PM
50	no	8/8/2018 11:32 AM
51	One thing I noticed is the degree to which "learnedness" seems to be revered within the OCA. Certain writers and their books were mentioned on several occasions during the week. What I did not hear was as much of an emphasis placed on spiritual figures within the Church and their importance for us today -- St. Seraphim of Sarov, modern Athonite saints, St. John of Kronstadt, etc. If an American church is going to mature, I would think it would have to eventually move away from academic figures to spiritual ones. It might be nice to give more of a place to anchoring the OCA on the rich heritage of our Orthodox monastic inheritance and its importance for spiritual formation than on more academic figures --	8/8/2018 11:18 AM
52	Spiritually uplifting. It was a positive attitude!	8/8/2018 11:11 AM
53	This was by far the most peaceful council I have attended.	8/8/2018 11:06 AM
54	Thank you! It was rather expensive for priest and lay delegate.	8/8/2018 11:02 AM

55	I appreciate what seemed to be an increased emphasis on making incarnate in our own personal lives the faith of the Church, on the importance of monasticism,, and the decreased emphasis on programs and strategies. Very much appreciated the Divine Liturgies each morning, and the Vigil the evening before the hierarchical..	8/8/2018 10:21 AM
56	Emphasis the events on Friday morning so more may plan on staying until the end.	8/8/2018 10:02 AM
57	I felt a general mood of positivity and encouragement about the shape and place of our Church, but I also witnessed a fair degree of complacency. We are not having serious conversations about demographic shifts, the rising average age of members of the OCA (especially in the Northeast), and the difficult work our hierarchs, clergy, and lay leaders face.	8/8/2018 9:33 AM
58	I was very glad to have attended. Overall I thought it was an excellent meeting, though very dense. Unfortunately I believe there is too much to cover in the time allotted, but I understand that most people would not be willing to spend additional time. I would suggest adding materials cost to the registration fee for those that want paper copies of everything. I would like to have a formal document that I can leave at my parish for future reference. I realize that this would take a great deal of effort, but the cost can be passed along and a more professional outcome would ensue.	8/8/2018 9:31 AM
59	no	8/8/2018 9:12 AM
60	Again, I am very grateful for all the hard work that was put into this council, I'm sure is very hard and plenty of hours. I'm grateful.	8/8/2018 7:46 AM
61	The AAC was well organized. The Secretariat processed registrants flawlessly, and were most helpful. The Bishops were readily accessible to all participants, as were members of the Central Administration. The food wagons were enthusiastic but were understocked - not their fault.	8/8/2018 12:23 AM
62	More social time.	8/8/2018 12:14 AM
63	Great council and amazing job with the youth program!!!	8/7/2018 11:41 PM
64	No	8/7/2018 11:03 PM
65	Which of the "original" Patriarchs is "supposed" to be in charge of South America? I feel that the OCA - while pursuing permission to expand and create missions in Central America is potentially exasperating the multi-jurisdictional problem in the Americas. If one believes that a unified church in America will only come about by pushing the other jurisdictions out (monopolizing), it becomes "an" approach. but cultural distinctions have in the past determined jurisdictional boundaries. The OCA seems to be ignoring that and endeavoring to encompass English, (French) and Spanish speaking "America".	8/7/2018 10:43 PM
66	In general, it was too long and too expensive. For those of us from mission churches that are relatively poor, the council seemed a bit excessive in terms of its cost.	8/7/2018 10:35 PM
67	Great job Fr. Eric T and the others who organized it. Thank you for your hard work and professionalism	8/7/2018 10:20 PM
68	Great organization team. Having food trucks was super idea. Maybe having urns of coffee available after hierarchal liturgy so people could have a cup before sessions start .	8/7/2018 10:12 PM
69	More, and shorter, forums.	8/7/2018 10:11 PM
70	None	8/7/2018 10:10 PM
71	Priest's wives are not honored properly when each priest has a free ticket to the formal dinner, but the cost of a ticket for a priest's wife is \$50! Maybe a less expensive, less formal dinner could serve the same purpose and perhaps some of the youth could be enlisted to babysit the kids for a couple of hours so that the priests and their wives could enjoy dinner together!	8/7/2018 9:52 PM
72	Getting meals was a bit difficult making it difficult to be on time for sessions and forums. I don't know where it would be good to have the next AAC.	8/7/2018 9:35 PM
73	No.	8/7/2018 9:23 PM
74	Overall I really enjoyed it and would love to have the opportunity to attend again.	8/7/2018 9:22 PM
75	hotel not very handicapped friendly / need hotel with more affordable budget restaurants vendors were excellent	8/7/2018 9:04 PM
76	It would be nice to have morning Liturgies at various times, such as one or two at 7 am.	8/7/2018 8:34 PM
77	Food options were a big problem. Not even having coffee available at mtgs. was a real time issue.	8/7/2018 8:28 PM

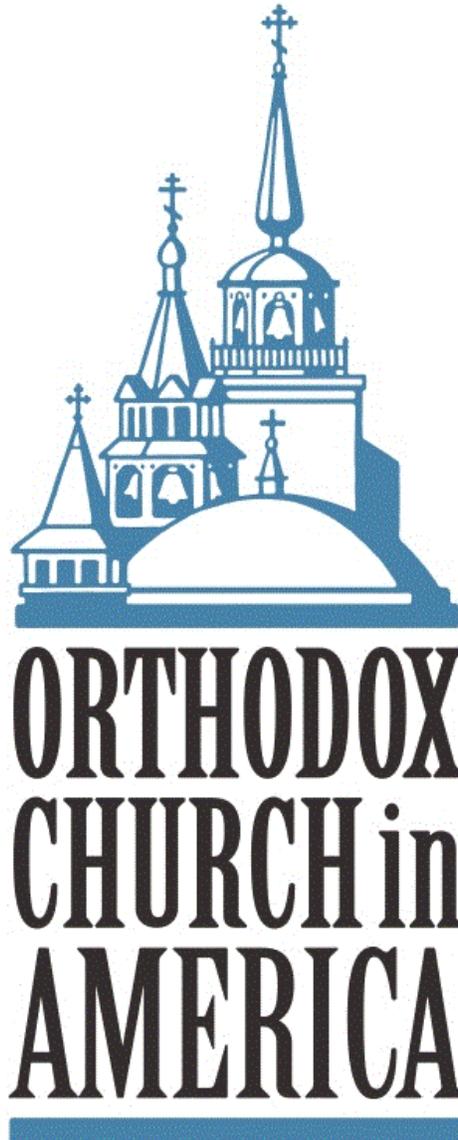
78	Event planning isn't easy - I do it for work. I applaud those who did the planning!	8/7/2018 8:22 PM
79	Thanks for all the work for a great council in St. Louis.	8/7/2018 8:04 PM
80	Better time management so that forums and workshops are not compromised for time. Diocesan bishops need to report how they implemented actions of AAC in their dioceses and not present I love me videos.	8/7/2018 7:41 PM
81	Again thanks to the local committee, pre conciliar committee Chancery staff department and office chairs presenters exhibitors for their great work at the AAC. It was good to have the FOCA conventioners in conjunction with the AAC. May our Lord grant them and our Hierarchs His Blessings and Many Years!	8/7/2018 7:31 PM
82	Thanks to the chancery staff/local committee. for co-ordination and management. When choosing the next council venue, it would be helpful to have convenience stores and Walgreen's type stores, fedex office located nearby or within hotel.	8/7/2018 7:31 PM
83	Great 6 am services	8/7/2018 7:10 PM
84	It's really not very productive or necessary.	8/7/2018 6:54 PM
85	More forums or the time to visit more than 2 would be appreciated. Even though reports were on line, speakers used a lot of time repeating what was written.	8/7/2018 6:38 PM
86	His Beatitude is both humble and kind. This set the tone for the council. One of the better ones, especially since it did not have as much of the "dog and pony" shows of the past.	8/7/2018 6:34 PM
87	Christ is in our midst, This year was my very first time attending the All American Council. I cried of sadness for our Sacramento church in the West "Holy Myrrhbearing Women" Overall I loved every bit of my experience. It was very educational and beautiful in so many ways. I look forward to attend future All American Council meetings. -Miss Mariesa Perez	8/7/2018 6:30 PM
88	Thank you to everyone who participated in the planning and execution - especially the local committee and volunteers helping throughout.	8/7/2018 6:22 PM
89	The cost of meeting at the fancy hotels is just overwhelming for all the missions and small parishes that I have served. Obviously it's difficult to find venues that are large enough to accommodate the large crowds, but there needs to be a lost-cost alternative hotel provided, something under \$100 per night.	8/7/2018 6:07 PM
90	I am a delegate from the Bulgarian OCA Diocese of Toledo. I felt hurt to notice that at the Pontifical Liturgy our Diocese is not commemorated along with our Bishop in the presence of the Body and Blood of Christ. Just because our Bishop is the Administrator of our Diocese, I assume. Nevertheless I felt my identity with the Diocese in the OCA meant nothing. I walk away from this All American Council wondering "Who are we?" hence the OCA accuses me of being overly sensitive.	8/7/2018 5:57 PM
91	no	8/7/2018 5:37 PM
92	Did you know that there are conference apps that you could use to communicate with attendees about changes in the schedule, descriptions of the talks, etc? It would be great to use one next time.	8/7/2018 5:33 PM
93	None.	8/7/2018 5:25 PM
94	Films were nice, but expensive to produce.	8/7/2018 5:24 PM
95	Schedule was way too packed. Totally neglected activities for young adults. Really? This was not good. Young adults really need to be included!!!!	8/7/2018 5:22 PM
96	As my Godmother would tell me, put the red pen away. Yes there are ways to improve; however, some things are done well. +Message from pre-readings & consistency of focus from Metropolitan Tikhon +The reports were thick and thorough giving everyone the opportunity to understand process, decisions, and coming impacts to grow and improve. Thankful. +Vendors-Great!!! +Breakout/forums were a nice change of format from large plenary sessions. +Voting and Discussion were smooth. Thankful for Judge Lanier. +Enjoyed blessed conversations with many in our Orthodox Family both clergy (&families) and delegates.	8/7/2018 5:00 PM
97	Resolutions appeared at end of agenda for every day as if to forestall any early departures for other activities and yet resolutions were offered only once. Place resolutions first on agenda. Also, there was no floor mgmt. of banquet, resulting in incomplete food service to some tables, because speakers went ahead rather than awaiting completion of food service. I hope you received a discount from the hotel!	8/7/2018 4:58 PM

98	Thank You for a wonderful opportunity to network, get to know leaders from other parishes and learn more about how the love of orthodoxy is spreading with the creation of new missions and the building of new churches. I feel more effort should go into re-establishing new members into regions that are losing members, helping to reignite the flame and love of orthodoxy now that the economy is starting to pick-up. We should encourage our youth to stay in local parishes in the North and Northeast.	8/7/2018 4:55 PM
99	Really outstanding in so many ways! Particularly liked Union Station hotel, because it had a number of places, especially the Grand Hall, where delegates could gather and visit informally.	8/7/2018 4:52 PM
100	None	8/7/2018 4:44 PM
101	Too long a cocktail hour before the banquet. Very good vendors. More time and improved locations for meals, especially after Liturgies Thank you Glory to Jesus Christ	8/7/2018 4:33 PM
102	Overall, it was lovely. Our youth had an amazing time! Thank you for putting this on. I know it takes a lot of work and sacrifice. I look forward to the next one!	8/7/2018 4:33 PM
103	Overall, I loved it. I am glad that it wasn't moved to every 4 years. I love my diocese, but what happens on a national level doesn't happen on a diocesan level. My daughter, who participated in the youth program loved it and that means a lot more to me. Please don't drop the youth program.	8/7/2018 4:24 PM
104	Time constraints!	8/7/2018 4:11 PM
105	Too much was crammed into the sessions.	8/7/2018 4:11 PM
106	Facilitators forums were not as equally prepared.	8/7/2018 3:54 PM
107	Seriously look and analyse why other churches are growing and the the OCA is not.	8/7/2018 3:53 PM
108	Overall, I felt that the Council was uplifting. It really demonstrated the unity of the Church. It was very nice to have the foreign bishops with us to this end, as well.	8/7/2018 3:37 PM
109	It is good that there is widespread recognition of the importance of youth development. We should also look to tradition and history to inform our approach to the cultivation of our young people. Treating the youth as a special demographic is a product of the modern West. I support youth directors and summer camps to the extent necessary to deal with the modern context, but these were things unknown to the Church of the catacombs. As Metropolitan Tikhon writes in the Four Pillars, mission begins in the parish and in the home. That's how generations of youth were reared in the Church since antiquity -- the example of the parents. Perhaps in the future there will be more opportunity for churchwide discussion of the hard questions which His Beatitude posed toward the end of the Four Pillars.	8/7/2018 3:30 PM
110	1st question--I was torn between answering "above average" and "average." In a way, it was a boring Council; but, as Mother Christophora pointed out in her Spiritual Life forum report, that's because we are at (relative?) peace. That's an "above average" statement, but perhaps then "average" in reverting to the norm.	8/7/2018 3:16 PM
111	Have a liturgy every day and the presence of the monastics and finally more men of color was very welcome and uplifting	8/7/2018 3:13 PM
112	Please, more time doing forums!	8/7/2018 3:12 PM
113	Nope	8/7/2018 3:11 PM
114	No, I thought it was very enjoyable!	8/7/2018 3:06 PM
115	People wanted to hear more about the OCA, chancery staff etc. Not enough time and no time for questions	8/7/2018 3:04 PM
116	Written reports do NOT have to be repeated verbally by the presenters. Open discussions could possibly be encouraged and increased.	8/7/2018 3:01 PM
117	I am so grateful to His Beatitude for his direction and the overall spirit of the council. It was a wonderful idea to have Fr Alexis speak via his presentations and it was wonderful to see the Metropolitan allowing us to see a bit of his life outside of his role as primate. (concerning what he said about his recent visit to his family home in France)	8/7/2018 2:59 PM
118	Thank you for the hard work to make it happen!	8/7/2018 2:51 PM
119	I was very glad for the Metropolitan stepping forward to nip in the bud the ugly flower of "culture wars" and its emphasis on self-righteousness, negativity and condemnation of others. It was my main dread when thinking about attending, beforehand.	8/7/2018 2:47 PM

120	Very inspiring overall; Fr Leonid's talk was a real low-point	8/7/2018 2:39 PM
121	It was my first council. The schedule should be less full due to the tendency to run over projected times.	8/7/2018 2:36 PM
122	No	8/7/2018 2:36 PM
123	The absence of crisis was wonderful, but the work of prayer that preceded to event made a huge difference. I could feel it	8/7/2018 2:33 PM
124	What we doing to have 1 Orthodox Church here in USA	8/7/2018 2:30 PM
125	Incredible hotel and beautiful hierarchical liturgy	8/7/2018 2:21 PM
126	None	8/7/2018 2:17 PM
127	Good job!	8/7/2018 2:08 PM
128	Pray the future ones will build on the unqualified success of this one. Thank you to all those behind the scenes who made it possible. God grant you many blessed years.	8/7/2018 2:08 PM
129	Every 4 years!	8/7/2018 2:03 PM
130	Whatever hotel/venue you select, make sure that the restaurants in the hotel are reasonably priced. The food trailers was a poor idea - long lines in the heat	8/7/2018 1:59 PM
131	The Council is a wonderful opportunity to reconnect and meet faithful from throughout our church. I can only imagine the tremendous amount of sacrifice and effort it took for the organizers and the local committee to "pull it off". You have my gratitude and deep respect - thank you!	8/7/2018 1:57 PM
132	Lower prices. Families cannot afford to attend	8/7/2018 1:54 PM
133	Thanks to all who worked so hard to make it an edifying event for the whole Church!	8/7/2018 1:50 PM
134	None	8/7/2018 1:49 PM
135	I think Akathists should precede the Liturgies on the other two mornings, as preparation for Divine Liturgy.	8/7/2018 1:46 PM
136	Thank you for the opportunity !	8/7/2018 1:46 PM
137	No	8/7/2018 1:46 PM
138	Appreciate the good work done by the organizers, both local and from the "synodal administration".	8/7/2018 1:44 PM
139	Very well organized, peaceful, uplifting.	8/7/2018 1:34 PM
140	Thanks to all for the good work.	8/7/2018 1:33 PM
141	I was very encouraged by the attempt to revitalize Fr. A. Schmemman's legacy within the OCA. That legacy is being either ignored or rejected.	8/7/2018 1:30 PM
142	no	8/7/2018 1:12 PM
143	Nice job!	8/7/2018 1:12 PM
144	None	8/7/2018 1:08 PM
145	Moving to every 4 years would have passed if a vision for an alternating 4 year gathering would be proposed. For example, AAC 2022, 2026, etc. Parish-Life Conference 2020, 2024, etc. It's also time to explore changing from parish representation to diocesan representation at the AAC; in other words, dioceses send representatives to the AAC. All said, this was a great AAC. I would be happy to volunteer at the 20th: <a href="mailto:deacon.alexander@gmail.com">deacon.alexander@gmail.com</a>	8/7/2018 12:49 PM
146	Very positive experience	8/7/2018 12:47 PM
147	Vendor and display hours should be limited, say noon to 6 each day.	8/7/2018 12:43 PM
148	Very moved to witness the Church in action!	8/7/2018 12:40 PM
149	N/a	8/7/2018 12:39 PM
150	The central hallway with the multitude of booths was a great hub to the whole Council. I loved the interaction of all the participants, including youth and vendors, in that space.	8/7/2018 12:37 PM
151	Great work by everyone on planning and executing the Council!	8/7/2018 12:28 PM

152	no	8/7/2018 12:19 PM
153	Maybe consider doing it in fall.	8/7/2018 12:16 PM
154	Fr. Timothy Sawchak and Bob Butchko did amazing work! God bless both them and all who assisted them!	8/7/2018 12:08 PM
155	Thank you!	8/7/2018 12:06 PM
156	Councils are expensive.	8/7/2018 12:03 PM

# **Social Media Guidelines for Clergy and Lay Leaders Orthodox Church in America**



**September, 2018**

## **1. Introduction**

These Guidelines are promulgated by the Holy Synod of the Orthodox Church in America for implementation by the Central Church Administration, ministries, dioceses, parishes, clergy, lay leaders, staff and volunteers who work within the institutional, social, and legal environment of the Church. They should be adapted for use in these various contexts in order to ensure protection for the workers, youth and adults who labor for the Church in these varying circumstances. While no guidelines of this nature can be dispositive of all possible issues which may arise in a rapidly changing legal and insurance context, these guidelines are meant to inform and assist those whose functions within the Church are implicated by various social media platforms. All entities are recommended to adopt these guidelines and abide by them in order to protect the interests of the Orthodox Church in America. These guidelines supersede those issued by the Holy Synod on October 6, 2011 and found here: <https://oca.org/holy-synod/statements/holy-synod/guidelines-for-clergy-use-of-online-social-networking>

Social media is a reality in today's world. There are many innovative means of communicating the message of the Church and to keep connected with others who share in accomplishing the mission of the Church. Clergy, adults and youth who frequently use social media must ensure that it is used responsibly and take measures to protect the Church and those with whom the Church interacts with on a regular basis. The exercise of personal responsibility is therefore of the utmost concern, especially for those in leadership positions within the Church. Disregard of this personal responsibility can place the Church and her many ministries in jeopardy. While these guidelines are not meant to restrict the freedom of expression of social media users, they are meant to raise awareness of the responsibility of the individual in such communications and to enhance the basic understanding of what the Church represents in the world.

Any issues in social media which violate canonical and legal standards will be addressed by appropriate Church authorities.

## **2. Definition of Social Media**

Social media is defined as the various computer, web or mobile based applications which enable individuals and communities to communicate with each other, share information and interact on various platforms and media. Such social media examples include Facebook, Twitter, Instagram, Snapchat as well as emails, video based platforms, blogs and bulletin boards. This list is not exhaustive due to the ever changing technical environment which characterizes social media but the basic rule is that social media includes any electronic platform that is used to communicate with others in a private or public manner.

## **3. General Assumptions**

- A. Clergy have a unique power dynamic with people with whom they have a pastoral relationship, and therefore have a special responsibility to guard how they interact with those people.
- B. All communications sent digitally (email, social networking sites, notes or posts, etc.) are not confidential and may be shared or reposted to others.

- C. Interactions in the virtual world need to be transparent, as a window in the door provides transparency in the physical world.
- D. In the virtual world healthy boundaries and practices must be adhered to just as they should be in the physical world.
- E. In the virtual world, “friend” can mean anyone with whom there is communication through that medium. In the physical world, friend can mean much more in terms of intimacy, self-disclosure, mutuality and expectations for relationship. The difference should be recognized and respected.
- F. Laws regarding mandated reporting of suspected abuse/neglect/exploitation of children, youth, elders and vulnerable adults apply in the virtual world as they do in the physical world.

#### **4. Social Media Best Practices**

- A. Remember that all internet postings are permanent and that despite any efforts to delete them, they may still be found online. Any social media postings need to be carefully considered and evaluated before posting and the poster must appreciate and understand their impact and accessibility beyond the directed audience.
- B. If there is a doubt as to whether to post a particular item, consult first with the appropriate hierarchical authority. It is better to be cautious and considerate rather than having to retract a communication after the posting. Use common sense.
- C. For personal protection and the protection of the Orthodox Church in America, it is prohibited from using internal or external social media channels to discuss confidential items, legal matters outside of the context of the attorney-client privilege, litigation, or the organization's financial performance. Confidential information includes anything labeled as such or information not available to the public. When asked by others to discuss any of these matters, the following statement can be issued with the approval of the appropriate parties: "Our social media policy only allows authorized individuals to discuss these types of matters. I can refer you to an authorized individual if you'd like to ask them," and then refer the question to the proper office or individual. In the case of the Orthodox Church in America that would include the Crisis Management Team at the central Church offices. For diocesan and parish matters, refer to the diocesan authorities.
- D. Be open and honest in communications. The Orthodox Church in America expects personal discretion and responsibility in the use of social media which includes respecting the trust of those with whom you are engaged. However, these policies are not meant to interfere with legal rights, expression of free speech or engagement in concerted or protected activities. Anonymity on social media does not absolve one of personal and corporate responsibility
- E. Respect personal privacy, coworkers' privacy, and the privacy of the Church by not providing personal or confidential information by means of social media without permission. Also, employees or volunteers are prohibited from sharing anything via social media channels that could violate the personal privacy or assumption of confidentiality of another employee or volunteer.

- F. Only those officially designated to do so may use social media to speak on behalf of the Church or a Church-related entity in an official capacity, though employees/volunteers may use social media to speak for themselves individually. If and when designated persons use social media to communicate on behalf of the Church, they should clearly identify themselves as a Church employee or volunteer.
- G. Utmost sensitivity and discretion must be exercised when communicating with youth through any digital or social media. Specifically, communication with minors must demonstrate transparency and take place in a group setting (not personal one on one communications). If it is necessary to send an individual message outside of a public area to a minor, copy another adult or a parent. Do not initiate a one-on-one relationship (such as “friending” from a personal profile) with a minor.
- H. Do not violate copyright and fair use laws and do not plagiarize another's work. Obtain permission to use any material created by someone else.
- I. Do not use the Orthodox Church in America’s email address or social media channels for personal use.
- J. Harassment, threats, intimidation, ethnic slurs, personal insults, pornography, obscenity, racial or religious intolerance, abuse, and any other form of behavior prohibited by law or morality are also prohibited via social media channels. Do not engage in any such behavior and do not make or comment on any such behavior, comments, or remarks.
- K. There may be comments on other churches, but made only with respect and without ridiculing, defaming, or libeling them in any way.
- L. If not officially authorized to speak on behalf of the Orthodox Church in America, use a disclaimer stating that what is being communicated is a personal opinion and not that of the Church when engaging in conversation on the Orthodox Church in America’s social media channels. Two sample social media disclaimers include: (1) "I work for the Orthodox Church in America, but this is my personal opinion."; and (2) "I am not an official spokesperson, but my personal opinion is . . . ." This requirement is not meant to interfere with rights to engage in concerted or protected activities but rather to ensure that others can easily distinguish the official position of the Church or the Church's leadership from those of our employees or volunteers.
- M. Users should exercise their best judgment when engaging in social media activities and should be on guard against actions and discussions that could harm the interests of our community, faith, or other persons.
- N. Before posting photographs of any person, obtain his or her permission.
- O. In the event of a violation of this Code of Conduct, report it to the Office of the Metropolitan or the Diocesan authorities. If you have questions about the Code of Conduct, please contact the Office of the Metropolitan.

- P. All of the other policies of the Orthodox Church in America apply to the use of digital and social media. All communication by employees or volunteers of the Church should take into account the OCA's values, reputation, and workplace policies.
- Q. There are to be no usage of anonymous name listings for any employee on the official social media accounts of the Orthodox Church in America. For example, the use of screenname that does not identify yourself and the position in the Church.
- R. The use of the Orthodox Church in America's logos and other proprietary symbols is prohibited without the specific permission from the Office of the Metropolitan.
- S. Any violations of the Code of Conduct of the Orthodox Church in America may result in discipline and/or termination of employment or volunteer affiliation or opportunities. All employees and volunteers in high profile positions of the central Church are required to sign the Code of Conduct form. It is recommended that diocese and parishes use the same standards.
- T. Dioceses, parishes, monasteries and other institutions of the Church should adopt social media policies analogous to those stated here.

## **5. Guidelines for Clergy**

- A. Clergy are strongly encouraged to set very stringent privacy settings on any social networking profile to shield both adult and youth members from viewing content that may be inappropriate.
- B. Digital communications are appropriate for communicating basic factual information such as the time of an event, agenda for a meeting, text of a document, etc. but are not appropriate for matters that are pastorally or legally sensitive, emotionally charged or require extensive conversation and explanation.
- C. Individual personal profiles of clergy are to be used to interact with real friends, family and peers. Clergy should not submit "friend" requests to parishioners and others to whom they minister. The disparity of power respecting clergy may not give the other person the ability to decline such request.
- D. Clergy are strongly advised not to accept "friend" requests from people with whom they have no prior relationship. "Friends" on social networking sites should be limited to people you have met before in person.
- E. Clergy who want to connect via a social networking website with parishioners are strongly encouraged to set up a group account that all parishioners may join. The purpose of having a personal profile and parish group is to create a line of privacy and maintain healthy boundaries with parishioners and real family, friends and colleagues.
- F. Clergy should consider the impact of declining a "friend" request from parishioners. These encounters may create a tension in "real world" relationships. Clergy can direct "friend" requests from parishioners to the parish's group page.

- G. Clergy who work directly with youth are encouraged to establish church sponsored digital communications groups to maintain contact with youth members.
- H. When a clergy assignment in a parish or other ministry setting ends, the cleric should remove parishioners as “friends” or contacts in all forms of digital communications.
- I. Clergy should manage their own profiles, and in the case that they do delegate that work, closely monitor their profiles for potential problematic content.
- J. Clergy should refrain from making political statements, joining political groups, or “becoming fans” of particular political candidates or political causes on social network sites.
- K. Clergy, especially new ones, should examine the pictures/videos that are posted of themselves to make sure they are appropriate to share with the general public
- L. All transcripts of on-line text chats, video chats, blogs or video blogs should be saved when possible.

## **6. Youth Protection Guidelines**

All of the relevant Policies, Standards and Procedures (PSPs) adopted by the Orthodox Church in America for the protection of youth are in force when utilizing social media. All violations of the PSPs through social media carries the same force as if done individually and in person. For further information see the PSPs which can be found at <https://oca.org/about/sexual-misconduct> on the Orthodox Church in America website.

- A. Adults who minister to children and youth are strongly encouraged to set very stringent privacy standards on any social networking profile.
- B. Adults should not submit “friend” requests to minors or youth. Youth may be unable to decline such requests due to the disparity of power between youth and adults. Youth may ask to be “friends”, and adults should discern the level of contact they want to maintain with youth prior to responding to these requests.
- C. Adults who want to connect via a social networking website with youth to whom they minister are strongly encouraged to set up a closed group account that youth may join. Youth requesting to “friend” an adult can then be invited to join this group rather than be accepted as a friend on an adult’s personal profile account. The purpose of the adult’s personal profile is to connect only with his or her real friends/relatives/peers. The purpose of these two separate accounts/profiles is to create a line of privacy and maintain healthy boundaries with youth and real family, friends and colleagues.
- D. Any material on any site (whether affiliated with the Church or not) which raises suspicion that a child has been or will be abused/neglected/exploited should be immediately reported to the local

Child Protective Services (commonly referred to as CPS though different states may have different names). If the material is on a Church-affiliated site, that material should be documented for church records and then removed from the site after consultation with DCF and/or police.

- E. Closed, but not “hidden” groups should be used for youth groups (Teen group, OCF, Jr. FOCA, Project Mexico Trip) These groups should have at least two unrelated adult administrators as well as at least two youth administrators.
- F. Invitations to youth to join the group should be made by youth administrators unless a youth previously asked an adult administrator to invite him/her to join the group.
- G. Behavioral expectations should be formulated and clearly posted on the group page.
- H. Inappropriate material that does not raise suspicion that a child has been or will be abused/neglected/exploited should immediately be removed from the site.
- I. At least one youth and one adult administrator of any group should be charged with regularly policing the group page for inappropriate posts or comments.
- J. Social networking groups for youth should be open to parents of current members.
- K. Parents should be informed that the content of youth pages or groups that are not sponsored by the Church are NOT within the purview of adult youth leaders.
- L. Adult leaders of youth groups and youth who are no longer associated with the group, due to departure, removal from position, or lack of eligibility because they “aged-out” of a program should be immediately removed from digital communication with youth groups via social networking sites, list serves, etc.
- M. No adult should be part of a youth initiated social media group. If the group is initiated and managed solely by youth then it is for youth only.
- N. No counseling of youth shall be provided via social media.
- O. There must be no anonymous or private postings or communications between adults and minor children.

## **7. Guidelines for Posting Pictures and Videos**

Employees and volunteers of the Orthodox Church in America are forbidden to post or distribute personal identifiable information including pictures of any child under the age of eighteen without verifiable consent of a parent or guardian. Personal identifiable information includes full name, photos, home address, email address, telephone number or any information that would allow someone to identify or contact a child. Verifiable consent can take the form of a release/permission form that includes use of photographs, an email from a parent or guardian, or oral permission by a parent or guardian in the presence of another adult.

For major events where it may be impossible to get permission from an individual parent or guardian of a child, a general announcement must be made well in advance of the event with instructions as to whom to contact in order to ensure photographs of their minors will not impermissibly be used. In addition, it is recommended that a signage be placed in an easily accessible location at the event with instructions that photographs of the event will be used on social media and that, if a parent/guardian desires to opt out of the use of images, instructions as to whom to contact in order to take advantage of the “opt out” option.

For parishes, monasteries and other Church institutions, a general sign in the vestibule should be placed where it can be seen by all who enter the Church informing them that images will be used unless the person specifically informs the leadership to opt out of the use of images of their children/minors. Instructions on whom to contact should be prominently displayed.

Parish representatives must inform parishioners when they are being videotaped because Church buildings are not considered public space. Any parish or community that distributes video of its worship services or activities on the web or via other broadcast media should post signs that indicate the service will be broadcast.

## **8. Conclusion**

The purpose of these Guidelines and forms are not to inhibit the free usage and convenience of the use of social media. Rather they are to protect the Church and the end users from the abuse of these platforms. If the basic rules for decency, civility and prosperity are exercised, social media can greatly enhance the interconnectivity of the Church. However, the users of the social media have a right to transparent, honest, civil interaction. These policies can only be effective to the extent that they are followed and respected by all in the Church who use social media.



# Social and Digital Media Code of Conduct

Social media has been defined in many ways. It includes electronic communications and online activities, such as text messages; email; wikis; and social networking like Facebook, Twitter, and the like; and posting comments, such as on blogs. Because of the blur between personal and professional communications, this Code of Conduct helps explain what is recommended and expected.

1. Remember all internet postings are permanent — able to be duplicated and may go viral.
2. Use your common sense. If you wonder whether or not to communicate or post, don't do it until you consult with the ORTHODOX CHURCH IN AMERICA leadership.
3. For your protection and the protection of the ORTHODOX CHURCH IN AMERICA, you are prohibited from using internal or external social media channels to discuss confidential items, legal matters, litigation, or the organization's financial performance. Confidential information includes anything labeled as such or information not available to the public. When asked by others to discuss any of these matters, you should relay that "Our social media policy only allows authorized individuals to discuss these types of matters. I can refer you to an authorized individual if you'd like to ask them," and then refer the question to the APPROPRIATE TEAM OR INDIVIDUAL.
4. Be open and honest about who you are when you communicate. The ORTHODOX CHURCH IN AMERICA trusts and expects you to exercise personal responsibility whenever you use social media, which includes respecting the trust of those with whom you are engaging. However, these policies are not meant to interfere with your legal rights to bargain collectively or engage in concerted or protected activities.
5. Respect your privacy, your coworkers' privacy, and the organization's privacy by not providing personal or confidential information without permission. Also, employees/volunteers are prohibited from sharing anything via social media channels that could violate another employee/volunteer's right to personal privacy.
6. Only those officially designated may use social media to speak on behalf of the organization in an official capacity, though employees/volunteers may use social media to speak for themselves individually. If and when designated persons use social media to communicate on behalf of the organization, they should clearly identify themselves as an employee/volunteer.
7. If you are communicating with youth through any digital or social media, act as you would if you were communicating in person. Specifically, communicate with minors using transparency and in a group, or do not communicate at all. If it is necessary to send an individual message outside of a public area to a minor, copy another adult or a parent. Do not initiate a one-on-one relationship (such as friending from a personal profile) with a minor.
8. Do not violate copyright and fair use laws and do not plagiarize another's work. Obtain permission if you wish to use material created by someone else.
9. Do not use the ORTHODOX CHURCH IN AMERICA's email address or social media channels for personal use.
10. Harassment, threats, intimidation, ethnic slurs, personal insults, pornography, obscenity, racial or religious intolerance, abuse, and any other form of behavior prohibited by law is also prohibited via social media

channels. Do not engage in any such behavior and do not make or comment on any such behavior, comments, or remarks.

11. You may comment on other churches, but you agree to do so respectfully without ridiculing, defaming, or libeling them in any way.
12. If you are not officially authorized to speak on behalf of the ORTHODOX CHURCH IN AMERICA, use a disclaimer saying that what you communicate is your personal opinion and not that of the organization when you are engaging in conversation on the ORTHODOX CHURCH IN AMERICA's social media channels. Two sample social media disclaimers include: (1) "I work for the ORTHODOX CHURCH IN AMERICA, and this is my personal opinion."; and (2) "I am not an official spokesperson, but my personal opinion is . . . ." This requirement is not meant to interfere with your rights to bargain collectively or engage in concerted or protected activities but rather to ensure that others can easily distinguish the official position of the organization or the organization's leadership from those of our employees/volunteers.
13. Users should use their best judgment when engaging in social media activities and should be on guard against actions and discussions that could harm the interests of our community, faith, or other persons.
14. Before posting photographs of any person, obtain his/her permission.
15. If you see a violation of this Code of Conduct, report it to Central; Administration of the ORTHODOX CHURCH IN AMERICA. If you have questions about the Code of Conduct, please contact DESIGNATED PERSON.
16. All of the ORTHODOX CHURCH IN AMERICA's other policies apply to the use of digital and social media. All communication by employees or volunteers should take into account the organization's values, reputation, and workplace policies.
17. You agree to provide the church with your identity and website url if you choose to write about the church. You also agree to make anyone designated by the church as your "friend" so that the church may monitor your postings.
18. Any violations of the ORTHODOX CHURCH IN AMERICA's Code of Conduct may result in discipline and/or termination of employment or volunteer opportunities.

I have received a copy of ORTHODOX CHURCH IN AMERICA's Social and Digital Media Code of Conduct. I understand it is my responsibility to become familiar with and adhere to the information contained herein. I understand that these policies are the property of the ORTHODOX CHURCH IN AMERICA

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Print Name

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Signature

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Date

# Orthodox Church in America Image Release Form



I hereby grant \_\_\_\_\_ (NAME OF CHURCH) \_\_\_\_\_ (the organization) permission to use my likeness in photographs, video recordings or electronic images in any and all of its publications, including website entries, without payment or any other consideration. I understand and agree that these materials will become the property of the organization and will not be returned. I hereby irrevocably authorize the organization to edit, alter, copy, exhibit, publish or distribute these images for purposes of publicizing the organization's programs or for any other lawful purpose. In addition, I waive the right to inspect or approve the finished product, including written or electronic copy, wherein my likeness appears. Additionally, I waive any right to royalties or other compensation arising or related to the use of my image. I hereby hold harmless and release and forever discharge the organization from all claims, demands, and causes of action which I, my heirs, representatives, executors, administrators, or any other persons acting on my behalf or on behalf of my estate have or may have by reason of this authorization.

I am 18 years of age and am competent to contract in my own name, or if I am under age 18, a parent or guardian has signed below. I have read this release before signing below and I fully understand the contents, meaning and impact of this release.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Printed Name)

If the person signing is under age 18 we would ask that that person sign but there must also be the signed consent by a parent or guardian, below:

I hereby certify that I am the parent or guardian of \_\_\_\_\_, named above, and do hereby give my consent without reservation to the foregoing release on behalf of this person.

\_\_\_\_\_  
(Parent/Guardian's Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Parent/Guardian's Printed Name)

**Orthodox Church in America  
Treasurer's Report  
September 2018**

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

This report presents: (1) Balance Sheet as of June 30, 2018; (2) Statement of Activities Summary as of June 30, 2018; (3) a proposed budget for 2018; and (4) the 2017 D'Arcangelo & CO, LLP Financial Audit Report.

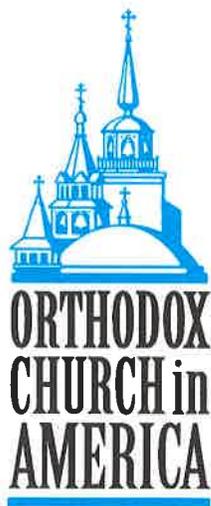
**(1) and (2) 2018 Financial Results (Exhibits A and B)**

*Exhibit A – Comparative Balance Sheets:* Our balance sheet as of June 30, 2018 shows total assets of \$3,736,260, total liabilities of \$445,384 and net assets of \$3,290,876, an increase of \$92,805 year-to-date. We have total cash of \$567,186, of which \$21,554 is unrestricted. Accounts receivable of \$127,108 represents May/June diocesan assessments due, most of which were received in July. Other current assets include payroll reimbursement from the OCA Pension Office of \$9,179, and prepaid expenses of \$9,815 for 2018 Blackbaud maintenance, and \$3,200 for the 19<sup>th</sup> AAC. Our restricted investments and trusts show a balance of \$2,623,345. Our current liabilities include \$76,772 in accounts payable and accrued expenses, \$217,791 in deferred AAC revenue and \$32,300 remaining on a retirement obligation. Our net assets at the beginning of the year were \$3,198,071; with the net surplus for the first half of the year stand at \$3,290,876 at June 30, 2018.

*(2) Exhibit B – Recap Actual versus Budget*

The 2018 budget projected a balanced Operating budget. Our actual results show a surplus of \$92,805. Our Unrestricted Fund (Operating fund) had a net deficit of \$19,652 for the quarter ended March 31, 2018, a net surplus of \$7,944 for the quarter ended June 30, 2018, **for a year-to-date operating deficit of \$11,708**. Exhibit B is a one-page recap of the year-to-date result. Highlights of the main revenue and expense category actual results for the year are:

1. Revenues – Total revenues were over budget by \$19,456, with \$22,744 representing increased diocesan support.
2. Expenses: Expenses through June 30th were over budget by \$40,774, due to several factors:
  - a. Administration was over budget by \$32.8K with \$13K representing a Communications assistant for two months (\$10K) and Administrative Consultant for three months (\$3K); annual Liability and Workers' Comp insurance payments in Q1 (\$8.8K), and \$13K in Travel representing the March for Life and annual Chancellors/Treasurers meeting, both in January.



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- b. Church Planting Grants were all funded from Operations while the budget anticipated taking one-third from the Missions Endowment (\$12.825K).
3. “Stewards of the Orthodox Church” Revenue and Expenses
  - a. The year-to-date revenues were \$37,696 as compared with the budget of \$48,056;
  - b. Departmental expenses were \$34,658 compared to a budget of \$52,076, for a positive variance of \$17,418.
4. Temporarily Restricted Funds: Total revenues were \$162,863 and expenses were \$59,757, including the required annuity payments for a net surplus of \$103,106.
5. Permanently Restricted Funds: We had income of \$1,407 and no expenses for a net surplus of \$1,407.

**(2) Proposed Budget – 2019: (Exhibit C)**

- The overall Operating Budget, including the “Stewards of the OCA”, Departmental programs, and funding for Mission Planting Grants and Seminaries, is a balanced budget – *Exhibit C*.  
Exhibit C includes a column for Final 2017, the Budget for 2018, Projected 2018, and Preliminary Budget 2019.
- **Operating Revenues:** Assessments for 2019 are budgeted according to the Finance Resolution adopted at the 19<sup>th</sup> All-American Council. The 2019 proposed budget reflects the 2% decrease for those dioceses still above the 34% proportional level. The result is a projected decrease of \$102,092 for 2019.
- **Operating Expenses:** The proposed budget for 2019 includes a decrease of \$35,571 from the projected 2018. The decreases in the 2019 Operating Expenses are as follows:
  - Administration – decrease of \$27K due to no Communications or Administrative consultants in 2019.
  - Executive – A decrease of \$6.5K due to elimination of medical insurance for part time Treasurer.
  - The resulting net surplus from operations is \$54,000. This projected surplus will be used as follows:
    - i. **Funding of Planting Grants from Operations:** In 2014, 2015, 2016 and 2017, Planting Grants were fully funded from the operational budget. The 2018 budget anticipated funding only 75% from operations, with the balance from the Missions Endowment. For 2019, the recommendation from the Department of Missions and Evangelization is for only \$36,000. The proposed budget anticipates funding this from operations.
    - ii. **Funding of Seminary Grants from Operations:** Starting in 2015 a line item for Seminary Funding was added to the

Operating Budget of the OCA. In 2015 the OCA distributed \$39K; in 2016 \$12K, in 2017 \$7K and in 2018 \$18K. The proposed 2019 budget anticipates again funding \$18K for the seminaries from the Operating Budget.

*The Proposed Operating Budget for 2019 is a balance budget.*

- 4. D’Arcangelo & Co LLP Audit Report and Financials – 2017: Exhibit D** The final 2017 Audit Report and Financial Statements are attached. Once again we received an “unqualified” opinion. Our net surplus for the year was \$371,202. **The Operating fund had a SURPLUS of \$244,038; Temporarily Restricted Fund had a surplus of \$124,399, and Permanently Restricted Fund had a surplus of \$2,765.**

Respectfully submitted,



Melanie Ringa  
Treasurer

Orthodox Church in America  
Comparative Balance Sheets  
As of June 30, 2018 and June 30, 2017

EXHIBIT A

	June 30, 2018	June 30, 2017
<b>ASSETS</b>		
<b>Current Assets</b>		
<i>Unrestricted</i>		
TD Bank - Operating	\$ 3,243	\$ 22,353
TD Bank - Payroll	\$ 1,414	\$ 638
Astoria Bank- St.Sergius Chapel	\$ 15,907	\$ 18,539
Petty Cash- Chancery Office	\$ 990	\$ 267
	\$ 21,554	\$ 41,797
<i>Temporarily Restricted</i>		
TD Bank- All American Council	\$ 305,420	\$ 105
TD Bank - Restricted	\$ 42,283	\$ 18,832
TD Bank- Savings	\$ 197,929	\$ 287,444
	\$ 545,632	\$ 306,381
<b>Total Cash</b>	\$ 567,186	\$ 348,178
<b>Accounts Receivable</b>		
Diocesan Support Receivable	\$ 127,108	\$ 132,540
Pledges Receivable	\$ -	\$ -
Desk Calendar Receivable	\$ -	\$ -
<b>Total Accounts Receivable</b>	\$ 127,108	\$ 132,540
<b>Other Current Assets</b>		
Bequest Receivable	\$ -	\$ -
Due from OCA Pension Dept	\$ 9,179	\$ 7,645
Prepaid Expense	\$ 13,015	\$ 12,057
Other	\$ -	\$ -
<b>Total Other Current Assets</b>	\$ 22,194	\$ 19,702
<b>Total Current Assets</b>	\$ 716,488	\$ 500,420
<b>Fixed Assets</b>		
Plant Fund - Real Estate	\$ 45,000	\$ 45,000
Plant Fund Building & Improve	\$ 625,308	\$ 552,108
Plant Fund Furniture & Equip	\$ 61,945	\$ 55,399
Plant Fund Auto & Garden Equip	\$ 65,922	\$ 58,922
Plant Fund Computer Equip	\$ 42,517	\$ 42,517
Plant Fund Software	\$ 33,000	\$ 33,000
Plant Fund Chapel Equip & Furn	\$ 25,000	\$ 25,000
Construction in Progress	\$ 65,145	\$ -
Accum Deprec Bld & Improvements	\$ (385,277)	\$ (374,830)
Accum Deprec Furn & Equip	\$ (33,881)	\$ (31,411)
Accum Deprec Auto & Garden Equi	\$ (58,921)	\$ (58,921)
Accum Deprec Computer Equip	\$ (31,331)	\$ (27,603)
Accum Deprec Computer Software	\$ (33,000)	\$ (33,000)
Accum Deprec Chapel Equip & Fur	\$ (25,000)	\$ (25,000)
<b>Total Fixed Assets</b>	\$ 396,427	\$ 261,181

Orthodox Church in America  
Comparative Balance Sheets  
As of June 30, 2018 and June 30, 2017

EXHIBIT A

	June 30, 2018	June 30, 2017
<b>Restricted Investments and Trusts</b>		
FOS Endowment -Phila Trust Co	\$ 79,079	\$ 77,820
Kavalenko Nimcrut-Wells Fargo Advisors	\$ 75,457	\$ 78,245
St. Andrew's Endowment - Phila Trust Co	\$ 113,266	\$ 111,000
Main Endowment - Phila Trust Co	\$ 1,293,260	\$ 1,260,642
HVIZD Annuity	\$ 79,824	\$ 83,362
Mission Endowment - Phila Trust Co	\$ 982,459	\$ 939,275
<b>Total Restricted Investments and Trusts</b>	\$ 2,623,345	\$ 2,550,344
<b>TOTAL ASSETS</b>	<b>\$ 3,736,260</b>	<b>\$ 3,311,945</b>
<b>LIABILITIES &amp; EQUITY</b>		
<b>Current Liabilities</b>		
Accounts payable and accrued Expenses	\$ 76,772	\$ 46,742
Deferred Revenue	\$ 217,791	\$ -
Auto loan - Chase Auto Finance	\$ -	\$ -
Accrued endowment distributions	\$ -	\$ -
Retirement Obligation	\$ 32,300	\$ 34,937
Other (Loan Payable to Diocese of theSouth)	\$ -	\$ -
Reserves for Archives	\$ -	\$ -
<b>Total Current Liabilities</b>	\$ 326,863	\$ 81,679
<b>Long Term Liabilities</b>		
Deferred Compensation and annuities		
Hvizd Annuity liability	\$ 69,087	\$ 72,868
Deferred revenue	\$ 331	\$ 331
Unitrust Liab reserves	\$ 49,107	\$ 49,301
<b>Total Deferred compensation and annuities</b>	\$ 118,525	\$ 122,500
<b>Total Liabilities</b>	\$ 445,388	\$ 204,179
<b>Equity</b>		
Unrestricted Net Assets, 12/31/16	\$ 126,478	\$ 126,478
Temporarily Restricted Net Assets, 12/31/16	\$ 1,669,036	\$ 1,669,036
Permanently Restricted Net Assets, 12/31/16	\$ 1,031,351	\$ 1,031,351
<b>Total Net Assets</b>	\$ 2,826,865	\$ 2,826,865
<b>Current Year Activity - 2018</b>	\$ 92,805	\$ -
<b>Current Year Activity - 2017</b>	\$ 371,202	\$ 280,901
<b>Total Net Assets</b>	\$ 3,290,872	\$ 3,107,766
<b>Total Equity</b>	\$ 3,290,872	\$ 3,107,766
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$ 3,736,260</b>	<b>\$ 3,311,945</b>
	\$ -	\$ -

**Orthodox Church in America**  
**Comparative Balance Sheets**  
**As of June 30, 2018 and June 30, 2017**

**EXHIBIT A**

	<b>June 30, 2018</b>	<b>June 30, 2017</b>
<b>Unrestricted Surplus/(Deficit) - 2017</b>	\$ 244,038	\$ 75,818
<b>Temp Restricted Surplus/(Deficit)</b>	\$ 124,399	\$ 49,807
<b>Perm Restricted Surplus/(Deficit)</b>	\$ 2,765	\$ 155,276
	<u>\$ 371,202</u>	<u>\$ 280,901</u>

<b>Unrestricted Surplus/(Deficit) - 2018</b>	\$ (11,708)
<b>Temp Restricted Surplus/(Deficit)</b>	\$ 103,106
<b>Perm Restricted Surplus/(Deficit)</b>	\$ 1,407
	<u>\$ 92,805</u>

Orthodox Church in America						
Statement of Activities vs Budget- RECAP BY DEPARTMENT						
For the months ended 6/30/18						
					EXHIBIT B	
	FINAL	Actual Q1	Actual Q2	YTD	2018 Budget	Variance
	Budget 2018	2018	2018	6/30/2018	6/30/2018	to Budget
<b>Unrestricted Funds:</b>						
Diocesan Support	\$ 1,706,644	\$ 422,385	\$ 453,681	\$ 876,066	\$ 853,322	\$ 22,744
Contributions	\$ 25,000	\$ 4,457	\$ 3,031	\$ 7,488	\$ 12,500	\$ (5,012)
Chapel	\$ 12,000	\$ 1,647	\$ 3,535	\$ 5,182	\$ 6,000	\$ (818)
Continuing Education Workshop Revenue	\$ 7,500	\$ -	\$ 9,000	\$ 9,000	\$ 3,750	\$ 5,250
Other	\$ 10,200	\$ 2,369	\$ 23	\$ 2,392	\$ 5,100	\$ (2,708)
<b>Total Revenues</b>	<b>\$ 1,761,344</b>	<b>\$ 430,858</b>	<b>\$ 469,270</b>	<b>\$ 900,128</b>	<b>\$ 880,672</b>	<b>\$ 19,456</b>
<b>Expenses:</b>			\$ -			
Executive Offices	\$ 430,142	\$ 103,644	\$ 99,602	\$ 203,246	\$ 215,071	\$ (11,825)
Administration	\$ 444,822	\$ 130,528	\$ 124,671	\$ 255,199	\$ 222,411	\$ 32,788
Metropolitan Expenses	\$ 67,324	\$ 12,319	\$ 20,210	\$ 32,529	\$ 33,662	\$ (1,133)
Holy Synod	\$ 61,280	\$ 7,304	\$ 23,904	\$ 31,208	\$ 30,640	\$ 568
Metropolitan Council	\$ 28,200	\$ 14,414	\$ 200	\$ 14,614	\$ 14,100	\$ 514
Property Support	\$ 217,274	\$ 64,532	\$ 50,885	\$ 115,417	\$ 108,637	\$ 6,780
Communications/TOC	\$ 81,200	\$ 25,040	\$ 20,454	\$ 45,494	\$ 40,600	\$ 4,894
External Affairs/ St Catherine's	\$ 126,211	\$ 28,459	\$ 39,770	\$ 68,229	\$ 63,106	\$ 5,124
Archives	\$ 101,668	\$ 36,311	\$ 14,136	\$ 50,447	\$ 50,834	\$ (387)
St Sergius Chapel	\$ 6,200	\$ 184	\$ 3,519	\$ 3,703	\$ 3,100	\$ 603
Ordination Candidate Testing	\$ 20,400	\$ 1,510	\$ 4,400	\$ 5,910	\$ 10,200	\$ (4,290)
Office of Policy on Sexual Misconduct	\$ 60,930	\$ 12,282	\$ 12,645	\$ 24,927	\$ 30,465	\$ (5,538)
Board of Theological Education	\$ 1,200	\$ -	\$ 5,351	\$ 5,351	\$ 600	\$ 4,751
PCC Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Church Planting Grants	\$ 74,350	\$ 25,000	\$ 25,000	\$ 50,000	\$ 37,175	\$ 12,825
Seminary Support	\$ 18,000	\$ -	\$ -	\$ -	\$ 9,000	\$ (9,000)
Strategic Planning-Continuing Education	\$ 9,000	\$ -	\$ 8,600	\$ 8,600	\$ 4,500	\$ 4,100
<b>Total Operating Expenses</b>	<b>\$ 1,748,201</b>	<b>\$ 461,527</b>	<b>\$ 453,347</b>	<b>\$ 914,874</b>	<b>\$ 874,101</b>	<b>\$ 40,774</b>
<b>Net Operating Surplus(Deficit)</b>	<b>\$ 13,143</b>	<b>\$ (30,669)</b>	<b>\$ 15,923</b>	<b>\$ (14,746)</b>	<b>\$ 6,572</b>	<b>\$ (21,318)</b>
<b>"Stewards of the Orthodox Church" and Departmental Ministries:</b>						
<b>Revenue (Appeals &amp; DVP Program)</b>	\$ 96,091	\$ 28,653	\$ 9,043	\$ 37,696	\$ 48,046	\$ (10,350)
<b>Expenses:</b>						
Administrative Expenses	\$ -	\$ 629	\$ 108	\$ 737	\$ -	\$ 737
Institutional Chaplaincy	\$ 8,125	\$ 1,912	\$ 1,650	\$ 3,562	\$ 4,063	\$ (501)
Evangelization	\$ 10,600	\$ 2,154	\$ 2,869	\$ 5,023	\$ 5,300	\$ (277)
Liturgical Music	\$ 12,000	\$ 3,064	\$ 2,927	\$ 5,991	\$ 6,000	\$ (9)
Pastoral Life	\$ 10,000	\$ 1,500	\$ 2,233	\$ 3,733	\$ 5,000	\$ (1,267)
Christian Education	\$ 10,902	\$ 1,500	\$ 1,788	\$ 3,288	\$ 5,451	\$ (2,163)
Youth and Young Adults	\$ 26,700	\$ 1,000	\$ 375	\$ 1,375	\$ 13,350	\$ (11,975)
Diaconal Vocations	\$ 15,250	\$ 3,000	\$ 3,422	\$ 6,422	\$ 7,625	\$ (1,203)
Christian Service/Humanitarian Aid	\$ 10,575	\$ 2,877	\$ 1,650	\$ 4,527	\$ 5,288	\$ (761)
<b>Total Expenses</b>	<b>\$ 104,152</b>	<b>\$ 17,636</b>	<b>\$ 17,022</b>	<b>\$ 34,658</b>	<b>\$ 52,076</b>	<b>\$ (17,418)</b>
<b>Net SOCA/Departmental Costs</b>	<b>\$ (8,061)</b>	<b>\$ 11,017</b>	<b>\$ (7,979)</b>	<b>\$ 3,038</b>	<b>\$ (4,031)</b>	<b>\$ 7,069</b>
Net Operating Income	\$ 5,082	\$ (19,652)	\$ 7,944	\$ (11,708)	\$ 2,541	\$ (14,249)
<b>Net Operating Income (GAAP Basis)</b>	<b>\$ 5,082</b>	<b>\$ (19,652)</b>	<b>\$ 7,944</b>	<b>\$ (11,708)</b>	<b>\$ 2,541</b>	<b>\$ (14,249)</b>
<b>Temporarily Restricted:</b>						
Revenues	\$ 385,250	\$ 52,264	\$ 110,599	\$ 162,863	\$ 192,625	\$ (29,762)
Expenses	\$ (378,880)	\$ (74,097)	\$ 14,340	\$ (59,757)	\$ (189,440)	\$ 129,683
<b>Net Surplus/(Deficit)</b>	<b>\$ 6,370</b>	<b>\$ (21,833)</b>	<b>\$ 124,939</b>	<b>\$ 103,106</b>	<b>\$ 3,185</b>	<b>\$ 99,921</b>
<b>Permanently Restricted:</b>						
Revenues	\$ 15,000	\$ 742	\$ 665	\$ 1,407	\$ 7,500	\$ (6,093)
Expenses	\$ (4,350)	\$ -	\$ -	\$ -	\$ (2,175)	\$ 2,175
<b>Net Surplus/(Deficit)</b>	<b>\$ 10,650</b>	<b>\$ 742</b>	<b>\$ 665</b>	<b>\$ 1,407</b>	<b>\$ 5,325</b>	<b>\$ (3,918)</b>
<b>Total Change in Net Assets</b>	<b>\$ 22,102</b>	<b>\$ (40,743)</b>	<b>\$ 133,548</b>	<b>\$ 92,805</b>	<b>\$ 11,051</b>	<b>\$ 81,754</b>

The Orthodox Church in America  
**Proposed Operating Budget - 2019**  
 By Department

Exhibit C

<u>Department</u>	<u>Actual 2017</u>	<u>Final Approved Budget 2018</u>	<u>Variance</u>	<u>Projected 2018</u>	<u>Proposed Budget 2019</u>	<u>Variance</u>	
<b>Total Operating Revenues</b>	\$ 1,891,653	\$ 1,749,344	\$ (142,309)	\$ 1,789,892	\$ 1,687,800	\$ (102,092)	(1)
<b>Expenses by Department/Office:</b>							
Administration	\$ 515,450	\$ 444,822	\$ (70,628)	\$ 477,398	\$ 450,000	\$ (27,398)	(2)
Executive	\$ 417,724	\$ 430,142	\$ 12,418	\$ 406,492	\$ 400,000	\$ (6,492)	
Archives	\$ 108,223	\$ 101,668	\$ (6,555)	\$ 100,894	\$ 101,000	\$ 106	
External Affairs	\$ 70,181	\$ 65,611	\$ (4,570)	\$ 47,608	\$ 50,000	\$ 2,392	
Property Maintenance	\$ 222,095	\$ 217,274	\$ (4,821)	\$ 227,415	\$ 225,000	\$ (2,415)	
TOC/Communications	\$ 70,734	\$ 81,200	\$ 10,466	\$ 86,094	\$ 81,200	\$ (4,894)	
Holy Synod	\$ 61,634	\$ 61,280	\$ (354)	\$ 52,808	\$ 60,000	\$ 7,192	
Metropolitan's Office	\$ 61,130	\$ 67,324	\$ 6,194	\$ 65,058	\$ 65,000	\$ (58)	
Metropolitan Council	\$ 33,985	\$ 28,200	\$ (5,785)	\$ 29,228	\$ 30,000	\$ 772	
St Catherine's Representation	\$ 55,854	\$ 60,600	\$ 4,746	\$ 65,702	\$ 60,600	\$ (5,102)	(3)
Ordination Candidate Testing	\$ 15,071	\$ 20,400	\$ 5,329	\$ 11,820	\$ 12,000	\$ 180	
Board of Theological Education	\$ 516	\$ 1,200	\$ 684	\$ 5,351	\$ 10,000		
ORSMA	\$ 84,821	\$ 60,930	\$ (23,891)	\$ 49,854	\$ 50,000	\$ 146	
Office of Continuing Education	\$ 10,725	\$ 9,000	\$ (1,725)	\$ 9,000	\$ 9,000	\$ -	
<b>Total Expenses</b>	\$ 1,728,143	\$ 1,649,651	\$ (78,492)	\$ 1,634,722	\$ 1,603,800	\$ (35,571)	
<b>Operating Surplus/(Deficit)</b>	\$ 163,510	\$ 99,693	\$ (63,817)	\$ 155,170	\$ 84,000	\$ (66,521)	
<b>SOCA/Departmental/Appeal Revenues</b>	\$ 69,822	\$ 96,091	\$ 26,269	\$ 75,392	\$ 75,000	\$ (392)	
<b>Departmental Expenses</b>	\$ (89,818)	\$ (103,434)	\$ (13,616)	\$ (104,152)	\$ (105,000)	\$ (848)	
<b>Net SOCA/Dept Surplus/(Deficit)</b>	\$ (19,996)	\$ (7,343)	\$ 12,653	\$ (28,760)	\$ (30,000)	\$ (1,240)	
<b>Planting Grants funded from Operations</b>	\$ (101,500)	\$ (74,350)	\$ 27,150	\$ (100,000)	\$ (36,000)	\$ 64,000	(4)
<b>Seminary/Monastery Grants funded from Operations</b>	\$ (9,324)	\$ (18,000)	\$ (8,676)	\$ (18,000)	\$ (18,000)		
<b>PCC/ACC Expenses funded from Operations</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Operating Surplus/(Deficit)</b>	\$ 32,690	\$ 0	\$ (32,690)	\$ 8,410	\$ -	\$ (8,410)	
<b>Total Operating Revenues</b>		\$ 1,845,435			\$ 1,762,800		
<b>Total Operating Expenses</b>		\$ 1,845,435			\$ 1,762,800		

(1) Diocesan Support per Formula	\$ 1,662,250.00
General Contributions	\$ 12,500.00
Misc Other	\$ 13,050.00
	<u>\$ 1,687,800.00</u>

(2) Administration does not include Communications or Administrative Consultants in 2019

(3) St. Catherine's 2019 does not include Travel to Russia for rector and family

(4) Planting Grant Recommendations from the Department of Missions and Evangelization are substantially lower for 2019 at \$36K instead of the \$100K.

**THE ORTHODOX CHURCH IN AMERICA**

**FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**THE ORTHODOX CHURCH IN AMERICA**

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**DECEMBER 31, 2017 AND 2016**

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**Orthodox Church in America**  
**19th All-American Council Revenues and Expenses**  
**As of September 19, 2018**

**REVENUES**

<b>General Council Operations:</b>	<b><u>As of 9/12/18</u></b>	<b><u>AAC Budget</u></b>	<b><u>Variance</u></b>
- General Donations	\$5,592.47	\$2,000.00	\$3,592.47
- Diocesan Proportional Giving	\$288,916.00	\$275,000.00	\$13,916.00
- Vendor and Exhibitor Fees	<u>\$27,654.17</u>	<u>\$42,500.00</u>	<u>(\$14,845.83)</u>
<b>Subtotal - General Operating Revenues</b>	<b>\$322,162.64</b>	<b>\$319,500.00</b>	<b>\$2,662.64</b>
<b>Youth Program:</b>			
- Grants	\$10,000.00	\$0.00	\$10,000.00
- Registration Fees	<u>\$28,000.00</u>	<u>\$18,750.00</u>	<u>\$9,250.00</u>
<b>Subtotal - Youth Program Revenues</b>	<b>\$38,000.00</b>	<b>\$18,750.00</b>	<b>\$19,250.00</b>
<b>FOCA Ad Book Revenues</b>	\$13,655.25	\$12,000.00	\$1,655.25
<b>Travel Fund Donations</b>	\$33,018.04	\$0.00	\$33,018.04
<b>Observer Fees</b>	<u>\$31,050.00</u>	<u>\$20,000.00</u>	<u>\$11,050.00</u>
<b>Total 19th AAC Revenues</b>	<b><u>\$437,885.93</u></b>	<b><u>\$370,250.00</u></b>	<b><u>\$67,635.93</u></b>

**EXPENSES**

<b>General Council Operations:</b>			
- Donation to FOCUS NA from Collections	\$ 5,855.00	\$ -	\$5,855.00
- Flowers and Liturgical Items	\$ 1,957.24	\$ 500.00	\$1,457.24
- PCC Lunch	\$ 51.60	\$ 200.00	(\$148.40)
- Outside Contractors	\$ 26,437.76	\$ 69,600.00	(\$43,162.24)
- Postage and Printing and Copying	\$ 8,866.67	\$ 11,300.00	(\$2,433.33)
- Office Supplies	\$ 5,678.89	\$ 12,268.00	(\$6,589.11)
- Stipends	\$ 17,125.00	\$ 15,000.00	\$2,125.00
- Conference Fees	\$ 627.00	\$ -	\$627.00
- Equipment Rental	\$ -	\$ 13,000.00	(\$13,000.00)
- Travel	\$ 52,730.25	\$ 50,300.00	\$2,430.25
- Lodging	\$ 41,276.27	\$ 41,600.00	(\$323.73)
- Meals and Food	<u>\$ 149,101.54</u>	<u>\$ 110,522.00</u>	<u>\$38,579.54</u>
<b>Subtotal - General Operating Expenses</b>	<b>\$ 309,707.22</b>	<b>\$ 324,290.00</b>	<b>\$ (14,582.78)</b>
<b>Youth Program:</b>			
- Grants to Youth attendees to cover registration	\$ 7,750.00	\$ -	\$7,750.00
- Food	\$ 5,950.00	\$ 6,250.00	(\$300.00)
- Supplies for Youth	\$ 5,287.97	\$ 2,000.00	\$3,287.97
- Activities Fees	\$ 18,863.50	\$ 10,000.00	\$8,863.50
- Travel to outings	<u>\$ 2,843.45</u>	<u>\$ 15,340.00</u>	<u>(\$12,496.55)</u>
<b>Subtotal - Youth Program Expenses</b>	<b>\$ 40,694.92</b>	<b>\$ 33,590.00</b>	<b>\$ 7,104.92</b>
<b>Travel Fund Expenses:</b>			
- FOS Tours - Mexico delegation	\$ 4,418.14	\$ -	\$4,418.14
- Union Station Hotel - Lodging and Food	\$ 14,474.64		\$14,474.64
- FOS Tours - Alaska delegation	<u>\$ 3,374.18</u>	<u>\$ -</u>	<u>\$3,374.18</u>
<b>Subtotal - Travel Fund expenses</b>	<b>\$ 22,266.96</b>	<b>\$ -</b>	<b>\$22,266.96</b>
<b>Total 19th AAC Expenses</b>	<b><u>\$ 372,669.10</u></b>	<b><u>\$ 357,880.00</u></b>	<b><u>\$ 14,789.10</u></b>
<b>Net Surplus</b>	<b><u>\$ 65,216.83</u></b>	<b><u>\$ 12,370.00</u></b>	<b><u>\$ 52,846.83</u></b>

<i>Orthodox Church in America</i>					
<i>Archives Renovation Recap as of September 11, 2018</i>					
<u>Project</u>	<u>Post date</u>	<u>Journal reference</u>	<u>Transaction amo</u>	<u>Acct Code</u>	<u>Vendor Total</u>
235	6/30/18	American Express-4-34000 Ju-Amex - June 2018	\$253.90	6504	
235	5/31/18	American Express-4-34000 mA-AMEX May 2018	\$39.98	6504	
235	1/31/18	American Express-4-34000Jan-Jan 2018 AMEX	\$1,009.60	6504	\$1,303.48
235	12/31/17	Bladykas ENgineering-9709-Archival Storage	\$1,340.00	6215	
235	3/31/18	Bladykas ENgineering-9955-Meetings with Oyster Bay Cove Zoning	\$1,600.00	6215	\$2,940.00
235	10/17/17	Hollinger Metal Edge-H78443-Document Cases	\$495.08	6504	\$495.08
235	3/27/18	Incorporated Village-Permit Fee-Permit FEe	\$150.00	6092	\$ 150.00
235	7/18/17	Mr. Gregory Shesko-Archives c-Archives Com Travel - mAY/jUNE 2017	\$860.28	6832	\$860.28
235	6/26/18	Reilly Tarantino Eng-Dep-Archiv-Deposit on Constrution for Archives	\$1,600.00	1608	\$1,600.00
235	8/2/17	Simpson Gumpertz & H-0221928-Building Enclosure Consulting	\$975.44	6215	
235	2/20/18	Simpson Gumpertz & H-0232641-Building Enclosure Consulting	\$660.00	6215	
235	12/19/17	Simpson Gumpertz & H-229941-Building Enclosure Consulting	\$4,655.00	6215	
235	6/8/17	Simpson Gumpertz & H-Retainer-Retainer - Bldg Enclosure Consulting	\$2,000.00	6215	\$8,290.44
235	8/8/17	Smiros & Smiros Arch-8029R-Document Reproduction - Scan /Email Existing Plans	\$44.54	6215	
235	8/8/17	Smiros & Smiros Arch-8126-Architectural Services Rendered 1/3/117 - 7/31/17	\$7,057.50	6215	
235	9/13/17	Smiros & Smiros Arch-8158-Ardhitectural Services Rendered 7/31/17 - 8/31/17	\$7,975.00	6215	
235	10/11/17	Smiros & Smiros Arch-8187-Architectural Services Rendered 8/31/17 - 9/30/17	\$1,075.00	6215	
235	11/15/17	Smiros & Smiros Arch-8223-Architectural Services Rendered 9/30/17-10/31/17	\$2,551.25	6215	
235	12/12/17	Smiros & Smiros Arch-8252-Architechural Services Rendered 10/31/2017 - 11/30	\$4,887.50	6215	
235	12/31/17	Smiros & Smiros Arch-8278-Archives work	\$206.25	6215	
235	2/1/18	Smiros & Smiros Arch-8300-Architectural Services Rendered 12/31/17-1/31/18	\$637.50	6215	
235	2/28/18	Smiros & Smiros Arch-8337-Archives Work Feb 2018	\$1,471.25	6215	
235	3/31/18	Smiros & Smiros Arch-8369-Archives Renovation March 2018	\$5,257.50	6215	
235	4/30/18	Smiros & Smiros Arch-8407-Archives Arch Work April 2018	\$837.50	6215	
235	5/31/18	Smiros & Smiros Arch-8441-Archives Work May 2018	\$6,088.75	6215	
235	6/30/18	Smiros & Smiros Arch-8467-Archives Renovation Expense June 2018	\$7,025.00	6215	
235	7/31/18	Smiros & Smiros Arch-8498-Archives Renovation	\$2,550.00	6215	
235	8/31/18	Smiros & Smiros Arch-8525-Archives Renovation	\$9,306.25	6215	\$56,970.79
235	6/12/18	Staples Credit Plan-6035517819-Supplies	\$195.90	6504	\$195.90
235	6/29/17	Stony Creek Consulti-062817-Archives Consulting	\$3,000.00	6215	
235	6/29/17	Stony Creek Consulti-062817-Archives Consulting	\$478.78	6832	\$3,478.78
235	6/29/17	Tamara Skvir-Archives p-Archives Project expenses	\$159.27	6504	\$159.27
235	6/29/17	Willetts Management S-117521-Gregore Trinkaus-Archives Committee	\$90.00	6832	\$90.00
		<b>Total Expenses 9/11/18</b>	<b>\$76,534.02</b>		<b>\$76,534.02</b>
		Archives Asset Transfer	\$211,129.99		
		Interest Income	\$137.69		
		Donations	<u>\$1,025.00</u>		
			\$212,292.68		
		<b>Net Archives Renovation Fund Balance 9/11/18</b>	<b>\$135,758.66</b>		

Planting Grant Recommendations  
Calendar Year 2019  
Priest John Parker  
Chair, Department of Evangelization

**Summary**

**TOTAL PLANTING GRANT REQUESTED FOR 2018: \$56,000\*\* (see request last page for math)**

***TOTAL RETURNING: \$36,000***

USA:	\$20,000	Rogers, AR	Diocese of the South
	\$16,000	Rolla, MO	Diocese of the Midwest

***NEW in 2018: \$0***

USA: None  
CANADA: NONE  
MEXICO: NONE

One new grant applications, New application from:

Diocese of the South: 1  
Phone call/potential application, NY/NY: 1

**Explanation of Recommendations—Returning:**

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

Annunciation is rapidly outgrowing her space. Annunciation is a very vibrant mission with an active liturgical life and a commitment to beauty. Winter visit last year proved well-received. Recommend third year grant.

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

St John's is a snapshot of a strong, first year grant. Attendance for weekend services (Sat/Sun) is large and growing. Numerous catechumens and a vibrant parish life. The parish is in a strong position to use this grant exactly as planned. Recommend second year grant.

**Explanation of Recommendations—Not at this time:**

***Not At this time:***

*Unnamed Mission*    Azle, Texas  
Diocese of the South    overseen by Fr Basil Zebrun of St Barbara's, Ft Worth

The Azle, TX, mission applied for the grant last year under the care of Fr Basil Zebrun, and again this year. They are right on the edge of being in a position to succeed with the grant. Another year's worth of financial growth \*and\* the allocation of a full-time capable priest will make them most competitive for the coming year.

### ***A FEW OBSERVATIONS ON SOME OUTGOING MISSIONS:***

Though the planting grant is somewhat of a science: a city of a certain size, a certain core group with a certain stewardship and attendance, plus 3 years of the planting grant, yields a stable, growing mission. This has been seen in spades in many places. Harrisburg, PA, Tempe, AZ, and Greensboro, NC, are three examples that come quickly to mind. The Arkansas Mission currently on the grant will, in all likelihood, yield similar results.

It is also an art, and sometimes a risk. Beaufort, SC, is one such example. Smalltown USA—but they graduated last year, and are moving forward bit-by-bit, with a full-time pastor, and working on a building program, as they outgrow their building (and it is simultaneously up for sale...).

The smaller-town missions are a roll of the dice. The right timing with the right priest and the right core group can yield remarkable results; any ingredient missing or twisted can lead to stagnation or decline.

The Waxahatchie Mission seems to be one with a capable, gifted priest, with evangelistic zeal, but a core group who seem quite content with their modest size. Three years of efforts in Waxahatchie have not yielded a mission capable of a full-time pastor in the post-graduate year.

The Alliance, OH, Mission, was a risk, to be sure. It had the benefit of strong finances and a (seemingly) committed core, and went into the grant following a tragedy (church arson)—which had the best potential to pull all together. All the above, plus personalities, seems to have had the reverse effect. The core group of 30+ has been reduced to under 20, and for the first time in my tenure, a mission has been recommended not even to apply for a second year. The Alliance Mission gives good reason to hesitate on complex applications. One strategic question: is it better to risk it with limited funds, or to go with the surer thing?

I entertained a last-minute call from Fr Jonathan Ivanoff on 9/12 for the mission in Oneonta. This case is also complex, as the mission has had many priest and tragedies, and is 20 years old. It has many positives: a trustworthy, gifted, stable priest, good store of money, land owned outright, and a 2-college town. However, the last minute-nature and a very-low monthly stewardship at the moment caused much pause, and, at Fr Jonathan Ivanoff's further consideration, with the mission priest, the decision was to wait one more year.

All that is to say: We have all-stars in the two grant returners; we have two examples of real struggle that hasn't borne fruit in two others.

In recent years, not for lack of invitation or knowledge, planting grant applications have been, on average, fewer, and weaker. And, with the long-suffering of Fr John Matusiak when mission grant priests don't stick to the schedule, we have regular posts, articles, photos of the good work being done.

+++++

REQUEST: I would like to ask that perhaps \$20,000 be budgeted for a summit of Diocesan Representatives. Now is a good time to return to some sort of model in this regard—but not titular. What we need is a core group of Priests who will be the standard bearers in their Dioceses. They will help promote church planting initiatives; they will help contribute to the upkeep and renovation of our materials and website, which began afresh this summer, with an intern.

Respectfully submitted,

Fr John Parker

Chair                      September 13, 2018

# D'Arcangelo & Co., LLP

Certified Public Accountants & Consultants

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## INDEPENDENT AUDITOR'S REPORT

Metropolitan Council  
The Orthodox Church in America  
Syosset, New York

### Report on financial statements

We have audited the accompanying financial statements of The Orthodox Church in America ("The Church") (a nonprofit organization), which comprise the statements of financial position as of December 31, 2017 and 2016, the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

### Management's responsibility for the financial statements

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

### Auditor's responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## **Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Orthodox Church in America as of December 31, 2017 and 2016, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

## **Supplemental information**

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The schedule of expenses related to the 2017 and 2016 financial statements on pages 25 - 26 is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the financial statements as a whole.

*D'Arcangelo & Co., LLP*

Rye Brook, New York  
August 27, 2018

**THE ORTHODOX CHURCH IN AMERICA**

**STATEMENTS OF FINANCIAL POSITION**

**DECEMBER 31, 2017 AND 2016**

	2017	2016
<b>ASSETS</b>		
Cash and cash equivalents	\$ 131,807	\$ 81,699
Assessments and other accounts receivable, net	274,447	213,523
Prepaid expenses	20,226	14,641
Investments:		
Archives fund	-	210,662
Endowment pool fund	1,303,867	1,072,038
St. Andrew endowment fund	115,534	112,569
FOS endowment fund	80,297	74,155
Missions endowment fund	990,214	851,711
Annuity and unitrust agreements	157,503	159,468
Restricted cash	211,105	99,538
Property and equipment, net	285,469	234,104
Total assets	\$ 3,570,469	\$ 3,124,108
<b>LIABILITIES AND NET ASSETS</b>		
Liabilities:		
Accounts payable and accrued expenses	\$ 216,208	\$ 131,630
Loans payable	-	1,764
Retirement obligation	38,000	40,637
Annuity and unitrust agreements	118,194	123,212
Total liabilities	372,402	297,243
Net assets:		
Unrestricted:		
Undesignated (deficit)	85,047	(107,626)
Invested in property and equipment	285,469	234,104
Total unrestricted	370,516	126,478
Temporarily restricted	1,793,435	1,669,036
Permanently restricted	1,034,116	1,031,351
Total net assets	3,198,067	2,826,865
Total liabilities and net assets	\$ 3,570,469	\$ 3,124,108

See notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**

**STATEMENT OF ACTIVITIES**

**YEAR ENDED DECEMBER 31, 2017**

	Unrestricted	Temporarily restricted	Permanently restricted	Total
<b>OPERATING SUPPORT, REVENUE AND RECLASSIFICATIONS</b>				
Support:				
General contributions	\$ 186,272	\$ -	\$ 2,765	\$ 189,037
Fellowship of Orthodox Stewards	-	61,092	-	61,092
Missions	-	2,820	-	2,820
Seminary	-	2,410	-	2,410
Charity	-	2,359	-	2,359
Donated services	39,900	-	-	39,900
Total support	<u>226,172</u>	<u>68,681</u>	<u>2,765</u>	<u>297,618</u>
Revenue:				
Assessments	1,797,836	-	-	1,797,836
All-American Council income	-	12,050	-	12,050
Net investment income	85	(12,189)	-	(12,104)
Change in actuarial value of annuities and unitrusts	-	260,135	-	260,135
Other revenue	31,832	-	-	31,832
Total revenue	<u>1,829,753</u>	<u>259,996</u>	<u>-</u>	<u>2,089,749</u>
Reclassifications:				
Satisfaction of restrictions	204,278	(204,278)	-	-
Total operating support, revenue and reclassifications	<u>2,260,203</u>	<u>124,399</u>	<u>2,765</u>	<u>2,387,367</u>
Expenses:				
Program services	641,633	-	-	641,633
General and administrative	1,191,943	-	-	1,191,943
Development	182,589	-	-	182,589
Total expenses	<u>2,016,165</u>	<u>-</u>	<u>-</u>	<u>2,016,165</u>
Change in net assets	<u>244,038</u>	<u>124,399</u>	<u>2,765</u>	<u>371,202</u>
Net assets, beginning of year	<u>126,478</u>	<u>1,669,036</u>	<u>1,031,351</u>	<u>2,826,865</u>
Net assets, end of year	<u>\$ 370,516</u>	<u>\$ 1,793,435</u>	<u>\$ 1,034,116</u>	<u>\$ 3,198,067</u>

See notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**

**STATEMENT OF ACTIVITIES**

**YEAR ENDED DECEMBER 31, 2016**

	Unrestricted	Temporarily restricted	Permanently restricted	Total
<b>OPERATING SUPPORT, REVENUE AND RECLASSIFICATIONS</b>				
Support:				
General contributions	\$ 84,646	\$ -	\$ 1,905	\$ 86,551
Fellowship of Orthodox Stewards	-	64,731	-	64,731
Missions	-	3,997	-	3,997
Seminary	-	3,465	-	3,465
Charity	-	2,499	-	2,499
Donated services	55,050	-	-	55,050
	<u>139,696</u>	<u>74,692</u>	<u>1,905</u>	<u>216,293</u>
Total support				
Revenue:				
Assessments	1,783,502	-	-	1,783,502
Net investment income	19	(8,769)	-	(8,750)
Change in actuarial value of annuities and unitrusts	-	285,479	-	285,479
Other revenue	31,687	-	-	31,687
	<u>1,815,208</u>	<u>276,710</u>	<u>-</u>	<u>2,091,918</u>
Total revenue				
Reclassifications:				
Satisfaction of restrictions	111,623	(111,623)	-	-
	<u>111,623</u>	<u>(111,623)</u>	<u>-</u>	<u>-</u>
Total operating support, revenue and reclassifications	<u>2,066,527</u>	<u>239,779</u>	<u>1,905</u>	<u>2,308,211</u>
Expenses:				
Program services	705,439	-	-	705,439
General and administrative	1,133,798	-	-	1,133,798
Development	189,365	-	-	189,365
	<u>2,028,602</u>	<u>-</u>	<u>-</u>	<u>2,028,602</u>
Total expenses				
Change in net assets	<u>37,925</u>	<u>239,779</u>	<u>1,905</u>	<u>279,609</u>
Net assets, beginning of year	<u>88,553</u>	<u>1,429,257</u>	<u>1,029,446</u>	<u>2,547,256</u>
Net assets, end of year	<u>\$ 126,478</u>	<u>\$1,669,036</u>	<u>\$1,031,351</u>	<u>\$2,826,865</u>

See notes to financial statements.

**THE ORTHODOX CHURCH IN AMERICA**  
**STATEMENTS OF CASH FLOWS**  
**YEARS ENDED DECEMBER 31, 2017 AND 2016**

	2017	2016
<b>Cash flows from operating activities:</b>		
Change in net assets	\$ 371,202	\$ 279,609
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation	20,593	31,392
Net realized and unrealized (gain) loss on investments	-	-
Net change in actuarial value of annuities and unitrusts	(229,939)	(258,885)
Changes in:		
Assessments and other accounts receivable, net	(60,924)	(88,868)
Bequests receivable	-	503,025
Prepaid expenses	(5,585)	(99,887)
Accounts payable and accrued expenses	84,577	90,710
Retirement obligation	(2,637)	(6,566)
Deferred revenue	-	(8,442)
Net cash provided by operating activities	177,287	442,088
<b>Cash flows from investing activities:</b>		
Additions to property and equipment	(71,957)	-
Proceeds from sales of investments	2,239,400	1,618,510
Purchase of investments	(2,181,291)	(2,049,612)
Change in cash restricted for endowment	(111,567)	(99,538)
Net cash (used in) investing activities	(125,415)	(530,640)
<b>Cash flows from financing activities:</b>		
Repayment of loan principal	(1,764)	(16,499)
Change in cash and cash equivalents	50,108	(105,051)
Cash and cash equivalents, beginning of year	81,699	186,750
Cash and cash equivalents, end of year	\$ 131,807	\$ 81,699

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 1. NATURE OF ORGANIZATION:

The Orthodox Church in America, ("the Church") was originally founded as a mission and later became a diocese in the Orthodox Church of Russia, uniting in its fold Orthodox Christians of various national backgrounds and traditions. It subsequently developed into a self-governing Metropolitanate, the Russian Orthodox Greek Catholic Church of America. Confirmation as an Autocephalous Church was accomplished by the action of the Patriarch and Holy Synod of Russia on April 10, 1970. The Church was proclaimed an Autocephalous Church on October 19, 1970, at the sessions of the All-American Council held at St. Tikhon's Monastery in South Canaan, Pennsylvania.

The Church is an Autocephalous Church with territorial jurisdiction in the United States of America and the Commonwealth of Canada. Its doctrine, discipline, and worship are those of the One, Holy, Catholic, and Apostolic Church as taught by the Holy Scriptures, Holy Tradition, the Ecumenical and Provincial Councils, and the Holy Fathers.

The Church is exempt from income tax under Section 501(c)(3) of the U.S. Internal Revenue Code and comparable state law, and contributions to it are tax deductible within the limitations prescribed by the Code. The Church has been classified as a publicly supported organization which is not a private foundation under Section 509(a) of the Code. The Church's revenues are derived primarily from contributions and assessments.

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:

#### **Basis of accounting**

The financial statements of the Church are presented on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America ("GAAP").

#### **Basis of financial statement presentation and classification of net assets**

Under GAAP, the Church is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):

#### **Basis of financial statement presentation and classification of net assets (continued)**

Net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions as follows:

*Unrestricted net assets* are those which include all resources which are not subject to donor-imposed restrictions of a more specific nature than those which only obligate the Church to utilize the funds in furtherance of its mission. Unrestricted net assets also include resources invested in property and equipment, “underwater” endowments and funds borrowed from endowments for use in operations.

*Temporarily restricted net assets* carry specific, donor-imposed restrictions on the expenditure or other use of contributed funds. Temporarily restricted net assets also include accumulated endowment earnings that are restricted by the donor for a particular purpose or whose use is unrestricted but have not yet been appropriated for expenditure. Temporary restrictions may expire either because certain actions are taken by the Church which fulfill the restrictions or because of the passage of time. Expirations of temporary restrictions on net assets (i.e., the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets.

*Permanently restricted net assets* are subject to the restrictions of gift instruments requiring that the principal be invested in perpetuity. Generally, the donors of these funds permit the organization to use all or part of the income earned on related investments, and the net capital appreciation thereon, for general or specific purposes.

#### **Use of estimates**

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect certain reported amounts of assets and liabilities and disclosures of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

#### **Cash and cash equivalents**

For purposes of the statements of cash flows, cash equivalents are defined as cash on deposit, cash on hand and money market funds not held for investment with maturities less than three months when acquired to be cash and cash equivalents.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):

#### **Concentrations of credit risk**

From time to time the Church may have bank deposits in excess of the Federal Deposit Insurance Corporation limits. The Church's cash management policy is to mitigate credit risks by investing in or through major financial institutions.

#### **Assessments and other accounts receivable**

Assessments and other accounts receivable are stated at the amount management expects to collect from outstanding balances. Receivables are expected to be collected within one year, and are therefore recorded at net realizable value. Management provides for probable uncollectible amounts through a provision for bad debt expense and an adjustment to a valuation allowance based on its assessment of the current status of individual accounts. Balances that are still outstanding after management has used reasonable collection efforts are written-off through a charge to the valuation allowance and a credit to accounts receivable.

#### **Investment valuation and income recognition**

Investments comprise money market funds, certificates of deposit, marketable debt and equity securities, and accrued interest and dividends thereon and are reported at fair value. Donated investments are reflected as contributions at their fair market values at date of receipt. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. The Church's investment committee determines the valuation policies utilizing information provided by the investment adviser and custodian. See note 6 for a discussion on fair value measurements. Adjustments to the carrying value of investments are reported in the statement of activities as a component of net investment income.

Purchases and sales of securities are recorded on a trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded on the ex-dividend date. Net appreciation includes the gains and losses on investments bought and sold as well as held during the year.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):

#### **Endowment investment and spending policies**

The Church maintains master investment accounts for its donor-restricted endowments. Realized and unrealized gains and losses from securities in the master investment accounts are allocated monthly to the individual endowments based on the relationship of the market value of each endowment to the total market value of the master investment accounts, as adjusted for additions to or deductions from those accounts. In classifying such funds for financial statement purposes as either permanently restricted, temporarily restricted or unrestricted net assets, the Board of Trustees looks to the explicit directions of the donor where applicable and the provisions of the laws of the State of New York. The Trustees have determined that, absent donor stipulations to the contrary, the provisions of New York State law do not impose either a permanent or temporary restriction on the income or capital appreciation derived from the original gift.

The Board of Trustees, acting through its Investment Committee, has established an endowment spending policy to support the current level of income needed from the endowment, while sustaining the long-term purchasing power of the endowment assets over the long-term.

The Church follows investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowment while seeking to maintain the purchasing power of the endowment assets. Endowment assets include those assets of donor-restricted funds that the Church must hold in perpetuity, or for donor-specified periods. Under this policy, the endowment assets are invested in a manner that is intended to maximize returns while assuming a conservative level of investment risk. Actual returns in any given year may vary.

To satisfy its long-term rate-of-return objectives, the Church relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Church targets a well-diversified and balanced asset allocation portfolio to achieve its long-term return and growth objectives within prudent risk constraints.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):

#### Property, equipment, and depreciation

Property and equipment is stated at cost, or if donated, at fair value on the date of donation. The Church capitalizes assets with a cost basis (or fair value for donated assets) of \$3,000 or greater, and expenditures for repairs and maintenance are expenses when incurred. When items of property and equipment are sold or retired, the related costs and accumulated depreciation are removed from the accounts and any gain or loss is reported as income. Depreciation is recorded on the straight-line basis over the following estimated useful lives:

Building and improvements	40 years
Furniture, fixtures and equipment	3 to 10 years
Software	3 years

#### Impairment losses

Management reviews property and equipment for impairment whenever events or changes in circumstances indicate that the carrying value of the asset may not be recoverable. Impairment is measured at the amount by which the carrying value exceeds the asset's fair value. If the asset is determined to be impaired, an impairment loss is recognized as a non-operating expense (non-cash) in the year the impairment was determined. There were no impairment losses recognized during the years ended December 31, 2017 and 2016.

#### Annuity agreements

The Church established gift annuities whereby donors may contribute assets in exchange for the right to receive an annual return during their lifetime. This transaction provides for a portion of the transfer to be considered a charitable contribution for income tax purposes. The difference between the amount of the annuity and the liability for future payments, determined on an actuarial basis, is recognized as income at the date of gift. The actuarial liability for annuities payable is evaluated annually (giving effect to investment income and payments to annuitants) and any surplus or deficiency is recognized as change in actuarial value of annuities and unitrusts in the statements of activities. Assets held for annuities payable totaled \$79,824 at December 31, 2017 (\$83,362 in 2016). The present value of the remaining future liability to be distributed by the Church amounted to \$69,087 in 2017 and \$72,868 in 2016.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):

#### **Unitrust agreements**

The Church is named as beneficiary of various charitable remainder unitrusts and acts as the trustee. These agreements provide for the payment of lifetime distributions to the grantor or other designated beneficiaries. Upon receipt of these agreements, the actuarially determined present value of future payments is recorded as a liability. The remaining portion of the trust attributable to the Church's future interest is recorded in the statements of activities as temporarily or permanently restricted contributions in the period received. On an annual basis, the present value of the remaining future liability is revalued based upon actuarial assumptions. Assets held in the charitable remainder unitrusts totaled \$77,679 at December 31, 2017 (\$76,106 at December 31, 2016). The present value of the remaining future liability to be distributed by the Church is calculated using various rates and applicable mortality tables and totaled \$49,107 at December 31, 2017 (\$50,344 at December 31, 2016).

#### **Support, revenue, reclassifications and expenses**

The Church recognizes gifts of cash and other assets as unrestricted support unless they are received with donor stipulations that limit the use of the donated amounts. Temporarily restricted net assets are reclassified to unrestricted net assets and recognized in the statements of activities as satisfaction of restrictions when a stipulated time restriction ends or purpose restriction is satisfied.

The Church recognizes gifts of property and equipment as unrestricted support unless explicit donor stipulations specify how the donated assets must be used. Absent explicit donor stipulations about how long those long-lived assets must be maintained, the Church recognizes expirations of donor restrictions when the donated or acquired long-lived assets are placed in service.

Bequests are recorded as support at the time the Church has an established right to the bequest and the proceeds are measurable.

Assessment income is recorded when earned, which is the period for which the assessments related. Other income is recorded when earned.

Expenses are recognized when incurred in accordance with the accrual basis of accounting. The costs of providing the various program services and supporting activities have been summarized on a functional basis in the statements of activities. Accordingly, certain costs have been allocated, based on management's estimate, among the program services and support activities benefitted. The Church incurred no joint costs for the years ending December 31, 2017 and 2016.

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued):**

**Donated property and services**

Donated non-cash assets are recorded at their fair values at the date of donation. Donated services that create or enhance non-financial assets or that require specialized skills, provided by individuals possessing those skills, and that would typically need to be purchased if not provided by donation, are recorded at fair value in the period received.

The Church reported donated professional services of \$39,900 for the year ended December 31, 2017 (\$55,050 in 2016) that meet current accounting standards.

**Reclassifications**

Certain reclassifications were made to the 2016 financial statements in order to conform to the 2017 presentation. These reclassifications had no effect on the change in net assets.

**3. CASH AND CASH EQUIVALENTS:**

Cash and cash equivalents consist of the following:

	<u>2017</u>	<u>2016</u>
Funds set aside for satisfaction of donor restrictions	\$ 23,532	\$ 28,610
Unrestricted operating funds	28,894	(2,635)
Reserve account	65,575	39,423
St. Sergius Chapel account	<u>13,806</u>	<u>16,301</u>
Total	<u>\$ 131,807</u>	<u>\$ 81,699</u>

**4. ASSESSMENTS AND OTHER ACCOUNTS RECEIVABLE:**

Assessments and other accounts receivable consist of the following:

	<u>2017</u>	<u>2016</u>
Assessments receivable	\$ 208,835	\$ 120,641
Other accounts receivable	<u>65,612</u>	<u>92,882</u>
Total	<u>\$ 274,447</u>	<u>\$ 213,523</u>

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 5. RESTRICTED CASH:

For 2017, restricted cash amounting to \$211,105 represents a transfer from a previous investment fund held for improvements and updates to the archives room. For 2016, the Church was a beneficiary in an estate for which it was notified of prior to December 31, 2016. All of the prior year receivable was collected in 2016. \$99,538 was held as a cash deposit at December 31, 2016 and subsequently transferred to the main endowment brokerage account in January 2017.

### 6. FAIR VALUE MEASUREMENTS:

The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1) and the lowest priority to unobservable inputs (level 3). The three levels of the fair value hierarchy are described below:

Level 1        Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that The Church has the ability to access.

Level 2        Inputs to the valuation methodology include:

- quoted prices for similar assets or liabilities in active markets;
- quoted prices for identical or similar assets or liabilities in inactive markets;
- inputs other than quoted prices that are observable for the asset or liability;
- inputs other that are derived principally from or corroborated by observable market data by correlation or other means.

If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3        Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques maximize the use of relevant observable inputs and minimize the use of unobservable inputs.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 6. FAIR VALUE MEASUREMENTS (continued):

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at December 31, 2017 and 2016.

*Corporate equity securities:* Valued at the closing price reported on the active market on which the individual securities are traded.

*Money market funds, negotiable certificates of deposit:* Value determined by reference to quoted market prices and other relevant information generated by market transactions, when available.

*U.S. government agency obligations, corporate bonds and municipal bonds:* Valued using pricing models maximizing the use of observable inputs for similar securities. This includes basing value on yields currently available on comparable securities of issuers with similar credit ratings.

*Mutual funds:* Valued at the daily closing price as reported by the fund. Mutual funds are open-end mutual funds that are registered with the U.S. Securities and Exchange Commission. These funds are required to publish their daily net asset value (NAV) and to transact at that price. The mutual funds held by The Church are deemed to be actively traded.

*Annuity investments:* Valued at the contracts actuarial present value by discounting the related cash flows based on current market discount rates and applicable mortality tables.

The preceding methods described may produce a fair value calculation that may not be reflective of future fair values. Furthermore management believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The inputs or methodology used for valuing investments are not necessarily an indication of the risk associated with investing in those investments.

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**6. FAIR VALUE MEASUREMENTS (continued):**

The following table sets forth by level, within the fair value hierarchy, the Church's assets at fair value on a recurring basis as of December 31, 2017 and 2016.

	Assets at fair value as of December 31, 2017			
	Fair value	Level 1	Level 2	Level 3
Corporate equity securities	\$ 1,623,036	\$ 1,623,036	\$ -	\$ -
Money market funds	849,297	849,297	-	-
U.S. Government agency obligations	19,741	19,741	-	-
Mutual funds	75,517	75,517	-	-
Annuity investments	79,824	-	79,824	-
	\$ 2,647,415	\$ 2,567,591	\$ 79,824	\$ -

	Assets at fair value as of December 31, 2016			
	Fair value	Level 1	Level 2	Level 3
Corporate equity securities	\$ 1,541,199	\$ 1,541,199	\$ -	\$ -
Money market funds	618,628	618,628	-	-
Negotiable certificates of deposit	40,123	-	40,123	-
U.S. Government agency obligations	26,919	26,919	-	-
Mutual funds	140,284	140,284	-	-
Annuity investments	83,362	-	83,362	-
Corporate bonds	30,088	-	30,088	-
	\$ 2,480,603	\$ 2,327,030	\$ 153,573	\$ -

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**6. FAIR VALUE MEASUREMENTS (continued):**

Investment income consists of the following:

	<u>2017</u>	<u>2016</u>
Interest and dividends	\$ 85	\$ 19
Investment fees	<u>(12,189)</u>	<u>(8,769)</u>
	<u>\$ (12,104)</u>	<u>\$ (8,750)</u>

**7. RISKS AND UNCERTAINTIES:**

**Investment risks**

The Church invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the statement of financial position.

**8. PROPERTY AND EQUIPMENT:**

Property and equipment consists of the following:

	<u>2017</u>	<u>2016</u>
Land	\$ 45,000	\$ 45,000
Buildings and improvements	552,109	531,783
Archive room improvements in progress	36,717	-
Furniture, fixtures, and equipment	181,838	204,173
Software	<u>33,000</u>	<u>33,000</u>
	848,664	813,956
Less: accumulated depreciation	<u>(563,195)</u>	<u>(579,852)</u>
Total	<u>\$ 285,469</u>	<u>\$ 234,104</u>

Depreciation expense amounted to \$20,593 in 2017 and \$31,392 in 2016.

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**9. LOANS PAYABLE:**

Loans payable consist of the following:

	<u>2017</u>	<u>2016</u>
Vehicle note payable, without interest, that matured in February 2017. Monthly principal payments amounted to \$881.	\$ <u>          -</u>	\$ <u>      1,764</u>

**10. LEASE COMMITMENTS:**

The Church leases office equipment under non-cancellable operating leases. Expenses related to these leases amounted to \$20,773 in 2017 and \$19,951 in 2016. Estimated future minimum lease payments by year and in the aggregate under the leases consist of the following:

<u>Year ending December 31,</u>	
2018	\$ 18,996
2019	13,008
2020	6,435

**11. RETIREMENT OBLIGATION:**

In 2007, the Church entered into an agreement with a former employee whereby the Church agreed to make monthly payments of \$950 to the former employee in lieu of retirement benefits from the separate Orthodox Church in American Pension Plan. The agreement exists to rectify a situation whereby the former employee had been improperly excluded from participation in the Orthodox Church in American Pension Plan, and will continue until the former employee's death. Payments related to this agreement amounted to \$11,400 for the each of the years ended December 31, 2017 and 2016. The actuarially calculated liability for future payments under this obligation amounted to \$38,000 in 2017 and \$40,637 in 2016.

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 12. MULTIPLE EMPLOYER PENSION PLAN:

Substantially all full-time employees participate in The Orthodox Church in America Pension Plan (Plan). This multi-employer plan, administered by the pension board of the Church, is a contributory plan, and provides defined benefits based on years of service and remuneration near retirement. The risks of participating in this multi-employer plan differ from single-employer plans in the following aspects:

- a) Assets contributed to the Plan by one employer may be used to provide benefits to employees of other participating employers;
- b) If a participating employer stops contributing to the Plan, the unfunded obligations of the Plan may be borne by the remaining participating employers;
- c) If the Church chooses to stop participating in the Plan, it may be required to pay to the Plan an amount based on the underfunded status of the Plan, referred to as a withdrawal liability.

Eligible employees are all employees of the Church and its related entities, except for employees that are older than age 60 and have not elected to be part of the Plan. Bishops and priests become members of the Plan on the first day of the month after they begin service with the Church. Full-time employees are eligible to participate in the Plan on the first day of the month after their date of hire. Participants with five years of services are entitled to pension benefits upon retirement. Pension benefits are provided to participants under several types of retirement options based upon years of service and age. Retirement benefits are paid to pensioners or beneficiaries in various forms of joint and survivor annuities, including a lump-sum payment option. Pension expense, representing the Church's required contribution to the Plan, was \$51,995 in 2017 and \$47,550 in 2016. The contribution made by the Church represented approximately 2.11% and 2.02% of the total contributions made to the Plan in 2017 and 2016, respectively. To the extent the Plan is underfunded, future contributions to the Plan may increase.

The Plan is a non-electing church plan which means the Plan sponsor has not elected to be covered by the terms of the Employee Retirement Income Security Act of 1974 (ERISA), and is not required to file Form 5500. The Plan's fiscal year is from January 1 to December 31.

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**12. MULTIPLE EMPLOYER PENSION PLAN (continued):**

Contributions from all employers to the Plan for December 31, 2017 and 2016 are as follows:

Pension Fund:	FEIN	2017	2016
Orthodox Church in America Pension Plan	06-1455789	\$ 2,465,474	\$ 2,353,912

As of December 31, 2017, the Plan's total net assets available for benefits were \$25,879,380, and the actuarial present value of accumulated Plan benefits was \$50,971,156. As of December 31, 2016, the Plan's total net assets available for benefits were \$23,698,253 and the actuarial present value of accumulated Plan benefits was \$49,211,285. As of December 31, 2017, the Plan was less than 65% funded.

**13. TEMPORARILY RESTRICTED NET ASSETS:**

Temporarily restricted net assets are as follows:

	December 31,			
	2016	Additions and other changes	Releases	2017
Mission appeal	\$ 914,836	\$ 76,637	\$ 39,330	\$ 952,143
Archives fund	210,337	1,818	37,851	174,304
Restricted endowments excess earnings	200,480	96,342	-	296,822
General purpose endowment excess earnings	115,540	49,128	-	164,668
Charity	71,803	2,359	3,359	70,803
Theological education – academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Seminary appeal	2,592	2,410	2,325	2,677
Other restricted purposes	64,592	-	21,430	43,162
	\$ 1,669,036	\$ 228,694	\$ 104,295	\$1,793,435

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**13. TEMPORARILY RESTRICTED NET ASSETS (continued):**

	December 31,			
	2015	Additions and other changes	Releases	2016
Mission appeal	\$ 841,910	\$ 138,270	\$ 65,344	\$ 914,836
Archives fund	209,584	753	-	210,337
Restricted endowments excess earnings	134,622	106,806	40,948	200,480
General purpose endowment excess earnings	74,870	42,211	1,541	115,540
Charity	70,804	2,499	1,500	71,803
Theological education – academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Chaplain reserve	1,896	-	1,896	-
Seminary appeal	6,715	3,464	7,587	2,592
Other restricted purposes	-	64,731	139	64,592
	\$ 1,429,257	\$ 358,734	\$ 118,955	\$ 1,669,036

**14. PERMANENTLY RESTRICTED NET ASSETS:**

Permanently restricted net assets consist of the following:

	December 31,	
	2017	2016
Donor restricted endowments:		
General purposes	\$ 234,166	\$ 231,401
Restricted purposes	775,762	775,762
Permanently restricted charitable remainder unitrust	24,188	24,188
	\$ 1,034,116	\$ 1,031,351

# THE ORTHODOX CHURCH IN AMERICA

## NOTES TO FINANCIAL STATEMENTS

DECEMBER 31, 2017 AND 2016

### 15. ENDOWMENTS:

The Church's endowments consist of approximately 40 individual funds established for a variety of purposes. Net assets associated with endowment funds are classified and reported based on the existence of absence of donor-imposed restrictions.

The Church classifies as permanently restricted net assets (a) the original value of gifts donated to the donor-restricted permanent endowment, (b) the original value of subsequent gifts to the donor-restricted permanent endowment, and (c) accumulations to the permanent endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund that is not classified in permanently restricted net assets is classified as temporarily restricted net assets until those amounts are appropriated for expenditure by the Church. The Church considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund.
- (2) The purposes of the Church and the donor-restricted endowment fund.
- (3) General economic conditions.
- (4) The possible effect of inflation and deflation.
- (5) The expected total return from income and the appreciation of investments.
- (6) Other resources of the Church.
- (7) The investment policies of the Church.

#### **Funds with deficiencies**

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor or endowment agreement requires the Church to retain as a fund of perpetual duration. In accordance with GAAP, deficiencies of this nature are reported in unrestricted net assets. Prior to 2016 the deficiency was \$447,807. Management utilized collected funds from an unrestricted bequest to repay the borrowing from the endowment fund assets in 2016. For 2017 and 2016, there were no deficiencies.

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**15. ENDOWMENTS (continued):**

Endowment net assets composition by type of fund as of December 31, 2017:

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>Total</u>
Donor restricted endowments for:				
General purposes	\$ 188,256	\$ 187,374	\$ 234,166	\$ 609,796
Restricted purposes	(24,896)	227,003	775,762	977,869
Total endowment funds	<u>\$ 163,360</u>	<u>\$ 414,377</u>	<u>\$ 1,009,928</u>	<u>\$ 1,587,665</u>

Changes in endowment net assets for the year ended December 31, 2017:

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>Total</u>
Endowment net assets, January 1, 2017	<u>\$ 14,184</u>	<u>\$ 325,384</u>	<u>\$ 1,007,163</u>	<u>\$ 1,346,731</u>
Investment return:				
Interest and dividend income (net of fees)	(1,624)	9,701	-	8,077
Realized and unrealized gains	43,788	89,531	-	133,319
Total investment return	<u>42,164</u>	<u>99,232</u>	<u>-</u>	<u>141,396</u>
Contributions	<u>96,773</u>	<u>-</u>	<u>2,765</u>	<u>99,538</u>
Other changes:				
Changes in funds with deficiencies	10,239	(10,239)	-	-
Endowment net assets, December 31, 2017	<u>\$ 163,360</u>	<u>\$ 414,377</u>	<u>\$ 1,009,928</u>	<u>\$ 1,587,665</u>

**THE ORTHODOX CHURCH IN AMERICA**

**NOTES TO FINANCIAL STATEMENTS**

**DECEMBER 31, 2017 AND 2016**

**15. ENDOWMENTS (continued):**

Endowment net assets composition by type of fund as of December 31, 2016:

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>Total</u>
Donor restricted endowments for:				
General purposes	\$ 84,715	\$ 115,541	\$ 231,401	\$ 431,657
Restricted purposes	(70,531)	209,843	775,762	915,074
Total endowment funds	<u>\$ 14,184</u>	<u>\$ 325,384</u>	<u>\$ 1,007,163</u>	<u>\$ 1,346,731</u>

Changes in endowment net assets for the year ended December 31, 2016:

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>Total</u>
Endowment net assets, January 1, 2016	<u>\$ (447,807)</u>	<u>\$ 209,492</u>	<u>\$ 1,005,258</u>	<u>\$ 766,943</u>
Investment return:				
Interest and dividend income (net of fees)	9,773	10,427	-	20,200
Realized and unrealized losses	12,360	134,198	-	146,558
Total investment return	<u>22,133</u>	<u>144,625</u>	<u>-</u>	<u>166,758</u>
Contributions	<u>411,125</u>	<u>-</u>	<u>1,905</u>	<u>413,030</u>
Other changes:				
Changes in funds with deficiencies	28,733	(28,733)	-	-
Endowment net assets, December 31, 2016	<u>\$ 14,184</u>	<u>\$ 325,384</u>	<u>\$ 1,007,163</u>	<u>\$ 1,346,731</u>

**16. SUBSEQUENT EVENTS:**

Management has evaluated subsequent events through August 27, 2018, which is the date the financial statements are available for issuance.

**THE ORTHODOX CHURCH IN AMERICA**  
**SUPPLEMENTAL SCHEDULE OF EXPENSES**  
**YEAR ENDED DECEMBER 31, 2017**

<b>EXPENSES</b>	<u>Program</u>	<u>General and Administrative</u>	<u>Development</u>	<u>Total</u>
Administration	\$ 16,925	\$ 469,860	\$ 41,500	\$ 528,285
Executive	-	427,389	-	427,389
Archives	108,223	-	-	108,223
External Affairs	70,181	-	-	70,181
Chapel	15,930	-	-	15,930
Property Support	10,296	201,503	10,296	222,095
Communications	-	-	70,734	70,734
Holy Synod	20,545	20,545	20,544	61,634
Metropolitans Office	20,043	20,043	20,044	60,130
Metropolitans Council	-	33,985	-	33,985
St. Catherine's Representation Church	18,618	18,618	18,618	55,854
Stewards of the OCA	-	-	853	853
Charity	5,063	-	-	5,063
Board of Theological Education	736	-	-	736
Missions and Planting Grants	124,621	-	-	124,621
Ordination Candidate Testing	15,071	-	-	15,071
Office for Review of Sexual Misconduct Allegations	84,821	-	-	84,821
Continuing Education Expenses	10,725	-	-	10,725
Seminaries	9,324	-	-	9,324
All-American Council	21,988	-	-	21,988
Departmental Ministries	88,523	-	-	88,523
Total expenses	<u>\$ 641,633</u>	<u>\$ 1,191,943</u>	<u>\$ 182,589</u>	<u>\$ 2,016,165</u>

**THE ORTHODOX CHURCH IN AMERICA**  
**SUPPLEMENTAL SCHEDULE OF EXPENSES**  
**YEAR ENDED DECEMBER 31, 2016**

<b>EXPENSES</b>	<u>Program</u>	<u>General and Administrative</u>	<u>Development</u>	<u>Total</u>
Administration	\$ 56,432	\$ 385,695	\$ 34,568	\$ 476,695
Executive	-	440,281	-	440,281
Archives	101,577	-	-	101,577
External Affairs	76,220	-	-	76,220
Chapel	14,167	-	-	14,167
Property Support	10,464	218,239	10,463	239,166
Publications	-	-	-	-
Communications	-	-	83,614	83,614
Holy Synod	23,205	23,205	23,204	69,614
Metropolitans Office	21,370	21,370	21,369	64,109
Metropolitans Council	-	29,901	-	29,901
St. Catherine's Representation Church	15,107	15,107	15,108	45,322
Stewards of the OCA	-	-	1,039	1,039
Charity	1,509	-	-	1,509
Board of Theological Education	806	-	-	806
Missions and Planting Grants	130,292	-	-	130,292
Ordination Candidate Testing	23,572	-	-	23,572
Office for Review of Sexual Misconduct Allegations	91,804	-	-	91,804
Continuing Education Expenses	13,750	-	-	13,750
Seminaries	19,587	-	-	19,587
All-American Council	6,261	-	-	6,261
Departmental Ministries	99,316	-	-	99,316
Total expenses	<u>\$ 705,439</u>	<u>\$ 1,133,798</u>	<u>\$ 189,365</u>	<u>\$2,028,602</u>

*Orthodox Church in America*  
*Audit Committee*

Reader John Skrobat, chair  
Matushka Theodora Blom, member  
Subdeacon Dimitri Pletz, member

September 12, 2018

The Holy Synod of Bishops and Metropolitan Council  
Orthodox Church in America  
PO Box 675  
Syosset, NY 11791

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

Most Blessed Master, Bless!

The audit committee spent September 11-13, 2018 at the Chancery to perform the internal audit of the Orthodox Church in America (OCA). We talked at length with Melanie Ringa, Treasurer, and Fr. Eric Tosi, Secretary, about the activities and transactions that have occurred since our visit last year.

In short, we were pleased with the high degree of accuracy and attention paid to maintaining the OCA Chancery accounts and policies in good order. However, there was one key area that we feel needs addressing and more diligence paid to by some of the Chancery staff:

- Credit card receipt documentation

We did sampling of various travel, meals, lodging, etc. expenses and were disappointed that our recommendations from last year apparently went unheeded, as we have not seen corrective behavior from some members of the Chancery staff. We feel it necessary to reiterate our concern and strongly recommend the need for stricter measures to be put in place regarding proper receipt documentation. In the Spring 2018 session of the Metropolitan Council, Fr. Eric Tosi motioned for updated Travel and Credit Card policies to be approved (which they were, unanimously), and we were disappointed to see that still there is disregard for these procedures amongst some of the staff. The Chancery has a corporate American Express credit card account and gives certain members access to this account. This account is in Melanie's name, of which she is apparently personally liable for. Some cardholders have consistently failed to properly document, or even provide documentation for their expenditures on this account. This provides a huge risk to the OCA, and to Melanie personally, if the Chancery were ever scrutinized by the IRS. While we leave it up to management to determine appropriate measures to implement, some possibilities could include suspension of certain cardholder's

access to this account if continued delinquency, or the abolishment of this account altogether and reversion to a strictly reimbursement system. There must be greater accountability for credit card receipt documentation.

The Committee reviewed the external auditors report for 2017, as well as January - June 2018 activity.

Investment funds continued to remain "above water" and we discussed with Melanie the timing of resuming disbursements from the various endowments.

Accounts receivable balances continued to remain low, and trending lower, indicating good diocesan oversight in sending in assessments to the Chancery. These assessments are critical to ensuring the Chancery has funds available to operate normally and support the work of the OCA.

We reviewed the financial statements of the various stavropegial institutions, and found them to be in good order. We were pleased to see recent financials for all stavropegial institutions this year, and expect to continue to see these financials in the future.

We were updated on the financial situation of St. Catherine's Representation Church in Moscow, Russia and are pleased with the Chancery's response and attention paid to the situation there. This will be something to continue to monitor over the years.

We are profoundly thankful for Melanie's diligence, thoroughness and sacrifices to maintain the Chancery's accounts in good order during her tenure as Treasurer. It has been our pleasure to serve the church in this capacity and contribute our time and talents.

Yours in Christ,



Reader John Skrobat, chair



Matushka Theodora Blom, member



Subdeacon Dimitri Pletz, member

The Statute of the Orthodox Church in America refers to the external relations of our Church in two places: 1) Article II on the Holy Synod – Among the matters within the jurisdiction and competence of the Holy Synod, Section 5(r) specifies ***Establishment of general policies regarding relations with other Orthodox Churches, non-Orthodox religious bodies, civil authorities, and secular entities.*** 2) Article IV on the Metropolitan, Section 2(k) states that to ***Represent the Church in its relations with other Orthodox Churches, other religious bodies and organizations, and secular authorities*** is among the matters included within the competence of the Metropolitan.

In his vision for the Orthodox Church in America, offered to the 19<sup>th</sup> All American Council with the title *Of What Life Do We Speak? Four Pillars for the Fulfillment of our Apostolic Mission in North America*, His Beatitude Metropolitan Tikhon identifies “Relations with Others” as the third pillar. Among the concerns of relations with others are the culture and society in which we sojourn, world-wide Orthodoxy, Orthodoxy in North America, ecumenical and interfaith and civic relations. These are the concerns and relationships in which the Office of External Affairs and Interchurch Relations provides information and support to our Metropolitan and to the Holy Synod.

The four pillars are: 1) The Spiritual Life; 2) Stewardship; 3) Relations with Others; 4) Outreach and Evangelism. Our Metropolitan’s vision for the Apostolic Mission of the Orthodox Church in America, which includes a subtitle: “A Guiding Framework for the Orthodox Church in America,” clearly asserts that “relations with others” are not marginal concerns for the Orthodox Church in America. This dimension of our Church’s life and witness is not a mere addendum or footnote. This dimension is part of the core responsibility of the Orthodox Church in America.. This means that the whole Church – bishops, priests, deacons, and laity – are called to deepen and advance our relations with others. In our relations with others our Church is called to express respect and love, at the same time making a clear witness to the Gospel of Christ.

While our witness in relations with others involves the whole Church, the responsibility of the Office of External Affairs and Interchurch Relations is specifically dedicated 1) to the support of the Primate as chief representative of the Orthodox Church in America “in its relations with other Orthodox Churches, other religious bodies and organizations, and secular authorities” and 2) to provide information and analysis to the Holy Synod on developments and issues among the Orthodox Churches, in other religious bodies and organizations, and in culture and society. The Metropolitan Council is also briefed on these issues. If more funding were available, the Office of External Affairs and Interchurch Relations would have more capacity and flexibility for its work. Yet even with the very limited funding available for the “external affairs” mission, by relying on competent and well-prepared volunteers, the “presence” and “footprint” of the Orthodox Church in America in our relations with others is surprisingly meaningful and significant.

Since his election as Primate of the Orthodox Church in America in 2012, His Beatitude Metropolitan Tikhon has succeeded in ensuring good relations with the Patriarchs and Primates of the Orthodox Churches around the world. This must be noted especially with regard to the Ecumenical Patriarchate, the Churches of Alexandria, Antioch, Moscow,

Georgia, Serbia, Romania, and Poland. A strong bond of common mission and vision exists with the Church of Finland, whose Archbishop Leo has accepted our invitation to be with us at the 19<sup>th</sup> All American Council.

It should be noted that our Primate will visit the Church of Poland in August this year, accompanied by Archbishop Benjamin of San Francisco and small delegation. It is anticipated that a visit to the Church of Romania will be planned in the near future.

In the Assembly of Canonical Orthodox Bishops in the United States of America the participation of the members of the Holy Synod of our Church is a worthy witness to Orthodox unity and collaboration in the present "jurisdictional" conditions, and a continuing, insistent witness to the goal of a united Autocephalous Church in North America. When Archbishop Demetrios, as chairman of the "American Assembly" formed a delegation to visit the Ecumenical Patriarch, he made sure that Metropolitan Tikhon was a member of this delegation. Archbishop Michael of New York serves as an officer of the Assembly in the capacity of Treasurer. There can be no doubt that the Orthodox Church in America treasures its identity as an autocephalous Church, and therefore as the Church in and for America, yet values and affirms Eucharistic communion and co-operation within the existing "jurisdictional" pluralism. The same witness is made in the Assembly of Canonical Bishops in Canada by Archbishop Irénée of Ottawa.

Under the direction of the Primate, the Office of External Affairs and Interchurch Relations implements the policies established by the Holy Synod. The Office is composed of Archbishop Alexander of Dallas (Diocese of the South) and Toledo (Bulgarian Diocese), who acts as Episcopal Liaison, and Protopresbyter Leonid Kishkovsky, Director of External Affairs and Interchurch Relations, and Professor John Erickson.

Upon the death of Archimandrite Alexander (Pihach), Dean of St. Catherine's Church in Moscow in 2016, Fr. Leonid Kishkovsky was appointed Acting Dean and Representative to the Patriarchate of Moscow. As the search for a successor to Fr. Alexander moved forward, Metropolitan Tikhon appointed a special committee to assist in the supervision and management of affairs at St. Catherine's Church, with Bishop Daniel of Santa Rosa serving as chairman. The members of the committee are Protopresbyter Leonid Kishkovsky, Archpriest Nazari Polataiko, and Ms Melanie Ringa (OCA Treasurer). At the end of 2017 Archpriest Daniel Andrejuk was appointed Dean and Representative by Metropolitan Tikhon with the concurrence of the Holy Synod. The special committee continues with the mandate to assist the new Dean and St. Catherine's Church.

In fulfilling the mandate to advance the witness of our Church in "relations with others," the Orthodox Church in America benefits from the active contributions of time and talent, knowledge and expertise, by many bishops, priests, deacons, and laity. Among the many settings and organizations in which our Church has presence and voice are: International Orthodox Christian Charities, Orthodox Christian Mission Center, World Council of Churches, National Council of the Churches of Christ in the USA, Canadian Council of Churches, Christian Churches Together in the USA, Church World Service, Lausanne Orthodox Initiative, Consultation with the Anglican Church of North America, March for

Life, Religions for Peace (International), Religions for Peace (USA), Appeal of Conscience.

The Orthodox Church in American gratefully acknowledges the following persons who have participated in these organization on behalf of the Orthodox Church in America:

Baktis, Fr. Peter,	Mueller, Fr. Elijah
Bouteneff, Prof. Peter	Mueller, Matushka Rebecca Luft
Hatfield, Fr. Chad	Parker, Fr. John
Hutcheon, Fr. Cyprian	Pierce, Fr. John
Jillions, Fr. John	Pisarchuk, Fr. Ted
Kallaur, Mrs. Arlene	Ready, Fr. Geoffrey
Kapral, Protodeacon Sergei	Rentel, Fr. Alexander
Kolyvas, Dr. Emanuel	Russin, Mr. Jonathan
Kowalczyk, Fr. John	Schneider, Prof. Richard
Kuchta, Fr. Alexander	Slanta, Mrs. Elizabeth
Matusiak, Archdeacon Joseph	Tate, Fr. Matthew
Ladouceur, Prof. Paul	Tosi, Fr. Eric G.
Meyendorff, Prof. Paul	Voytovich, Fr. Stephen
Mosher, Matushka Jennifer	Zahirsky, Matushka Valerie

In his "Four Pillars" reflections, His Beatitude Metropolitan Tikhon identifies three "Enduring Goals" in the Orthodox Church's "relations with others"

1. To radiate the humility, peace, and love of Jesus Christ to our surrounding culture, whether on the international, national, local, or personal level and to address every issue that faces our communities with patience, truth, and compassion.
2. To humbly, but steadfastly, uphold the vision of the Orthodox Church in America for the establishment of a universally recognized and canonically sound ecclesiological structure for Orthodoxy in North America; to strengthen our relations with other Local Orthodox Churches and to actively participate in pan-Orthodox endeavors, particularly in the Assembly of Bishops process.
3. To prioritize our participation in ecumenical bodies, maintaining our faithfulness to Orthodoxy while presenting a worthy witness to other bodies, both Christian and non-Christian and to appropriately engage civil and governmental bodies.

The Office of External Affairs and Interchurch Relations, in collaboration with the volunteers identified above, will seek to advance these goals in support of the Primate of our Church and the Holy Synod.

#### **Addendum from Chancery Master Calendar**

Sept. 1-7, 2015: Lausanne Orthodox Initiative, Finland  
Sep. 15-17, 2015: Assembly of Bishops, Chicago  
October 13, 2015: Church World Service, Syosset

October 29 - Nov 5, 2015: WCC/NCC/CCC Evangelism Conference, Toronto  
Nov. 20-27, 2015: MT Trip to India

Jan. 8-11, 2015: Metropolitan Trip to Mexico, Jan 8 -11, 2016  
Jan 22, 2016: March for Life, Jan 22, 2016  
Feb 16 -17, 2016: CCT Heads of Communion meeting  
Feb 22 - March 1, 2016: Metropolitan trip to Finland  
March 18 -21, 2016: Metropolitan trip to Constantinople  
Mat 4 -5, 2016: NCC meeting and Metropolitan speech  
May 18 -23, 2016: Presentation on evangelism, Spain (MP)  
June 19 -27, 2016: Representatives at Great and Holy Council in Crete  
August 17 – 18, 2016: ACNA, Syosset  
Oct 4 -6, 2016: Assembly of Bishops, Detroit  
Nov 17 -22, 2016: Metropolitan trip to Moscow for Patriarch 70th birthday  
December 1-10, 2016: St. Catherine Church, Moscow

Jan 13 -16, 2017: Metropolitan trip to Mexico  
Jan 27, 2017: March for Life  
Mar 2 -3, 2017: CCT meeting  
Mar 10 - 12, 2017: Billy Graham Conference on Persecuted Christians, Washington  
Sep 5 -8, 2017: Lausanne Orthodox Initiative in Cambridge, UK  
Oct 3 -5, 2017: Assembly of Bishops, Garfield, NJ  
Oct 25 -27, 2017: RC/Orth consultation  
Nov 8, 2017: Metropolitan at UN Prayer Service  
Nov 30 - Dec 8, 2017: Representative Trip to Moscow  
Dec 12, 2017: WCC Leaders Meeting in Geneva

Jan 6 -8, 2018: Metropolitan trip to Mexico  
Jan 19, 2018: March for Life  
Mar 6 -16, 2018: World Conference on Missions and Evangelism  
June 5 -8, 2018: Lausanne Orthodox Initiative in Boston  
June 18-21, 2018: 2nd International Conference on Digital Media and Pastoral Care  
June 24-28, 2018: The Initiative for Missional Ecumenism, Green Lake, Wisconsin

*Note: This list at the time of preparation is not complete.*

**19<sup>th</sup> All American Council, St. Louis, Missouri, July 23-27, 2018**

**Banquet Address, July 26, 2018**

**Protopresbyter Leonid Kishkovsky**

Tonight I am bringing a message to us all – to you and to me – from St. Herman of Alaska. These are the words of St. Herman to us:

From this day forth,

from this very hour

and this very minute,

Let us love God above all

and seek to accomplish His Holy Will.

Our pilgrimage as Orthodox Christians of North America, our journey as the Orthodox Church in America, starts with the arrival of Orthodox missionary monks in Alaska. Among them was a holy man – a man living a holy life and making a holy witness.

As our journey unfolded through time, the identity of the Orthodox Church in America was revealed. We were tested and tried, we faced times of trouble, we faced crises and achieved successes. Let's reflect together on our journey. Perhaps we will discover what today constitutes our identity.

We affirm the priority of holiness in the Orthodox mission in Alaska and North America. We affirm the relevance of the holy witness of the Monk Herman for our own witness today in North America. *From this day forth, from this very hour and this very minute, let us love God above all and seek to accomplish His Holy Will.*

The Monk Herman was a member of the missionary group of eight monks who arrived at Kodiak in 1794. The journey covered more than 7,000 miles and lasted nearly 300 days, it began at Valaam Monastery in Russian Karelia and ended in Kodiak in Russian Alaska. In the midst of primitive conditions and many dangers and hardships, the missionaries endeavored to evangelize the Alaskan

natives. Very soon upon arriving at Kodiak the missionaries established the Holy Resurrection Church.

The ruling authority in Russian Alaska was the Russian-American Company, whose policy towards the natives was harsh. The missionaries tried to defend the natives. The Monk Herman was loved by the natives for his humility and compassion. Although he did not learn the language of the native people, the language of love and respect and tender care won the hearts of the Aleuts. Seeking solitude as a hermit and desiring to distance himself from the ruling authority, the Monk Herman moved to Spruce Island, off the Alaskan mainland. He died in 1836 at the age of 81, having served the mission and his beloved Aleuts for 43 years.

The sanctity of the Monk Herman was affirmed in his canonization in 1970, less than half a year after the granting of autocephaly to the Orthodox Church in America. The remains of the Monk Herman were transferred from Spruce Island to the Holy Resurrection Church in Kodiak. According to the accounts of many witnesses the services of the canonization were full of light and joy. The participation of Archbishop Paavali of Finland in the canonization symbolized the connection of St. Herman to Valaam Monastery. The Archbishop was himself a monk of Valaam before Finland lost part of Karelia and with it Valaam Monastery to the Soviet Union.

The story of the Alaskan Mission is a story which includes martyrdom, hardships in sea travel, dangers in the wilderness – an authentically apostolic history.

**The first dimension of our identity is holiness as lived and embodied by St. Herman. This is the very source of our presence and mission in North America. It is both a gift to be treasured, and a challenge to be fulfilled in our own life and witness.**

**The second dimension of our identity is the missionary zeal and evangelistic outreach embodied in the life of St. Innocent Veniaminov.**

The future great missionary came to Alaska in 1824 as a 27-year-old priest with his wife and children, serving first in Unalaska and then in New Archangel (today's Sitka). Fr. John came because he heeded

the call of the Church to bring the Good News of Christ to the Alaskan native people. He had real gifts as an ethnographer and linguist, an explorer and inventor.

While on a visit to Russia in 1839 Fr. John was widowed. He accepted monastic tonsure with the name Innocent in 1840, and in the same year was consecrated as Bishop to oversee Alaska and part of Siberia – a vast diocese. When the Hieromonk Nicholas (Kasatkin) traveled to Japan in 1860-1861, an unexpected winter delay in the Russian Far East allowed him to meet and converse at length with Archbishop Innocent. This encounter was decisive in providing guidance and perspective to Fr. Nicholas for his apostolic labors in Japan. Thanks to Archbishop Innocent, Fr. Nicholas understood the importance of learning the Japanese language and working on the translation of holy scripture. Putting this advice into practice, when Archbishop Nicholas of Japan died in 1911 he left a vigorous Orthodox Church with Japanese priests and catechists, with translations of holy scripture and divine services, with an expanding network of parishes and mission stations, and deep respect in the Imperial Court and among the Japanese people.

The sale of Alaska to the United States in 1867 elicited a written comment by Archbishop Innocent. Rumors had reached him that he was hostile to the sale of Alaska. Seeking to correct the record, he wrote to the Ober Procurator, the lay chief administrator of the Holy Synod appointed by the Imperial Government, with the following points.

1. The sale of Alaska to the United States is a providential step, opening the United States to Orthodox mission.
2. The current bishop in Alaska should be called back to Russia, and should be succeeded by one who speaks English.
3. The episcopal see should be transferred from New Archangel (Sitka) to San Francisco.
4. Allow the bishop to ordain to the priesthood converts from among American citizens.
5. Allow the bishop and all clergy to celebrate the divine services in English, for which purpose the services must be translated into English.
6. Use English rather than Russian as the language of instruction in schools established in San Francisco and elsewhere to prepare people for ordination and missionary work.

In 1868 Innocent was elected Metropolitan of Moscow, serving as de facto first hierarch of the Church of Russia until his death in 1871. He persevered to the end of his life as an advocate and visionary of Orthodox Mission.

Metropolitan Innocent was canonized as a saint in 1977 by the Church of Russia at the request of the Holy Synod of the Orthodox Church in America.

The story of Metropolitan Innocent is vivid and colorful, giving us a sense of the missionary vocation of the Orthodox Church. Many others played their part in the evangelizing of the peoples of Alaska and in bringing the Orthodox Faith to North America. A shining example of the apostolic mission in Alaska is the Holy Priest Yakov Netsvetov, whose memory we celebrate today.

**The third dimension of our Orthodox identity in America is embodied in the American ministry of St. Tikhon, serving as bishop and finally as archbishop in America from 1898 to 1907. This was a time to continue the Orthodox missionary vocation, a time to welcome and give pastoral assistance to arriving immigrants and their church communities in the United States and Canada, a time to nurture a united Orthodox Church with a culturally and linguistically diverse population.**

The ministry of Bishop Tikhon was remarkably varied and yet consistent, modest and patient and yet inspired. His gifts were recognized, as is evident in his elevation to Archbishop in 1905, and his eventual election as Patriarch of Moscow in 1917. Just to identify his accomplishments one by one is also to lift up his vision and its relevance to our identity.

- Transferred episcopal see from San Francisco to New York
- Blessed Isabel Florence Haggood, a lifelong member of the Protestant Episcopal Church and renowned translator, to make an English translation of the divine services
- Welcomed immigrants from the Middle East and Eastern Europe
- Established new parish communities for the immigrants
- Established seminary in Minneapolis
- Established St. Tikhon's Monastery in South Canaan, Pennsylvania
- Encouraged the active participation of clergy in making decisions for the missionary diocese
- Provided for election of Raphael Hawaweeny as Bishop for the Arabic speaking communities

- Provided for appointment of an auxiliary bishop for Alaska
- Welcomed the cultural and linguistic pluralism of Orthodoxy in North America by envisioning a united Orthodox Church, with Arabic, and Serbian, and Greek communities led by Arabic and Serbian and Greek bishops
- This pluralism was obviously open to Romanians, Albanians, Bulgarians, and others, as needs required
- Affirmed the openness of the Orthodox Church to dialogue with other Christian bodies
- Convened the first All American Council in 1907, providing for the full participation of clergy and lay delegates
- Described the future of Orthodoxy in America, officially reflecting on future autonomy and even autocephaly

When he was elected Patriarch of Moscow, in the midst of the violence of the Communist Revolution, it was clear to the new patriarch and many others that the road ahead for the Church of Russia was the way of the cross, the way of martyrdom and suffering. St. Tikhon was canonized by the Russian Orthodox Church in 1989.

For our Church in America, the impact of Revolution in Russia was felt in the loss of contact with the Russian Orthodox Church. The support from Russia which the Church in America had enjoyed was gone, creating severe budgetary challenges. Among many other losses, the Seminary had to be closed. There was no theological education available until the opening of St. Vladimir's Seminary and St. Tikhon's Seminary in 1938. Slowly, in the middle of the 20<sup>th</sup> century, our Church, then called the North American Metropolia, regained its footing and its sense of mission. One example was the creation of suburban parishes with divine services in the English language. By the 1960s the Moscow Patriarchate understood that the time for claiming jurisdiction over the Metropolia had passed. And the Metropolia, appealing to the Patriarchate of Constantinople to show leadership in creating a pan-Orthodox unity in America, was told that the problems of the Metropolia could be resolved only with Moscow. This, in turn, brought about the conversations and negotiations that led to the granting of autocephaly to the Orthodox Church in America in 1970.

For some, the autocephaly has become an abstraction, a technicality, a canonical and perhaps dispensable detail. In reality, the autocephaly of the Orthodox Church in America confirms the authenticity of the Orthodox Church in America's mission and voice and presence in America. Our mission is not to be an embassy of other countries or cultures. Our mission is to be an embassy of the Orthodox faith in America and to America.

We obviously still live in a time of Orthodox pluralism in North America. Yet we are faithful to the vision of holiness, mission, and unity handed down to us by those who came before us. We live humbly in peace and harmony with Orthodox brothers and sisters who belong to other Orthodox churches. Yet we boldly affirm a vision of common purpose and unity to which all Orthodox are called.

This All American Council has "For the Life of the World" as its guiding theme. When Fr. Alexander Schmemmann wrote his reflections under this title he was preparing to speak to a student conference and was bringing the Orthodox faith, the Orthodox understanding of the sacraments, and indeed the Orthodox worldview to an audience which knew little about Orthodoxy. It is remarkable that this book quickly became popular and meaningful to all manner of readers – both Orthodox and not Orthodox, English-speaking and (through numerous translations of the book) those speaking in many other languages. The book and its teaching and insights remain popular and meaningful around the world. While the book is a personal theological and liturgical reflection of Fr. Alexander, it brings to many the world over the living voice of the Orthodox Church in America.

The joyful eucharistic vision shared with us by Fr. Alexander is a way of summing up the journey of Orthodoxy in America and opening the road to the future. The holiness of St. Herman at the foundation of the Orthodox mission in Alaska, the missionary outreach extended to the "ends of the earth" by St. Innocent, the pastoral faithfulness of St. Tikhon – all this is offered by us to God "on behalf of all and for all" in the Divine Liturgy, the Liturgy in which we confess that Jesus Christ "gave himself up for the life of the world." Furthermore, this eucharistic vision orients us to the second coming of the Lord, leads us to the peace, joy, and love of the Kingdom of God.

The last words spoken in church by Fr. Alexander Schmemmann, a matter of days before he died, were words of thanksgiving on Thanksgiving Day in 1983. This final sermon offered “ourselves and each other and our whole life” to God in a hymn of thanksgiving. With some additions appropriate to our gathering in Council, let us make these words our own here and now as our common hymn of thanks.

**Thank You, O Lord!**

Everyone capable of thanksgiving is capable of salvation and eternal joy.

**Thank You, O Lord,** for having accepted our Eucharist, which we offered to the Holy Trinity, Father, Son, and Holy Spirit, and which filled our hearts with the joy, peace and righteousness of the Holy Spirit.

**Thank You, O Lord,** for having revealed Yourself unto us and given us the foretaste of Your Kingdom.

**Thank You, O Lord,** for having united us to one another in serving You and Your Holy Church.

**Thank You, O Lord,** for having helped us to overcome all difficulties, passions, temptations and restored peace, mutual love and joy in sharing the communion of the Holy Spirit.

**Thank You, O Lord,** for the sufferings You bestowed upon us, for they are purifying us from selfishness and reminding us of the “one thing needed:” Your eternal Kingdom.

**Thank You, O Lord,** for having given us this country where we are free to worship You.

**Thank You, O Lord,** for this Council, our dioceses, our parishes and missions, our monastic communities, and our seminaries where the name of God is proclaimed.

**Thank You, O Lord,** for our families: husbands, wives and, especially children, who teach us to celebrate Your holy name in joy, movement and holy noise.

**Thank You, O Lord,** for everyone and everything.

**Great are You, O Lord,** and marvelous are Your deeds, and no word is sufficient to celebrate Your miracles.

**Lord, it is good to here! Amen.**



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September 21, 2018

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

On behalf of the OCA Pension Board, I take this opportunity to update you on the status of the Pension Plan as of August 31, 2018. The net time-weighted return on core investments managed by Morgan Stanley from August 31, 2017 to August 31, 2018 was 6.10% compared to our benchmark of 6.56%. The net time-weighted return for the period December 31, 2016 to August 31, 2018 on core investments managed by Morgan Stanley was 9.01 % compared to our benchmark of 9.94% This is very close to our long-term strategy target of 7% for the plan. While the US market is strong, international and emerging markets are not as strong and this created some drag on the return overall. The ending market value of plan assets at August 31, 2018 was \$25,264,195.

The Pension Board presented a summary of activity for the last three years at the AAC in St. Louis in July of 2018. Feedback from the formal presentation and the two in depth forums provided at the AAC were very positive and the Board feels strongly that both the forums and the Pension booth should continue with the next AAC. This has been an important opportunity to meet with plan members and has been very well received in the past. Work continues on the effort to obtain endowments to the Plan as well as the continuing discussions regarding retired priests serving what is being called “distressed parishes” and overall compliance with the mandate of the AAC that all clergy and eligible lay employees of the OCA be members of the Pension Plan.

With regard to participation in the Pension Plan, there are currently 349 active participating members and 189 monthly benefits recipients.

Respectfully Submitted,

Priest Gleb McFatter, Chairman

**Charity Committee Report for  
Fall 2018 Metropolitan Council Meeting**

**Committee members:** His Eminence Archbishop Melchizedek, Episcopal liaison, Archpriest John Jillions, Chancellor, Melanie Ringa, Treasurer, Archpriests John Dunlop, Thomas Moore, Antonio Perdomo, Dennis Rhodes, Alexander Kuchta, chair, Priest Joseph Lucas, Robert Graban, Maureen Jury, and Lisa Mikhalevsky.

**Charity Committee activity:**

Balance in Charity as of 1/30/18	\$6107.81
Donations 1/31/18-6/30/18	635.00
Stripe fees 1/1-1/30/18	.45
Balance as of June 30, 2018	6742.36

During my time as chair of the committee (CC), we worked with chancery and web site staff and the CC was able to establish a page for Charity on OCA.org. By having a donation button, we have been able to start a modest stream of income for charitable work. Thanks go to everyone who helped with this effort. While the CC is primarily focused on helping clergy and their families, we have also helped lay persons involved with Church work.

We had hoped to further publicize the existence of the CC and to launch a modest appeal in order to further fund its work. The CC had had discussed and planned for an appeal in November of last year, but this did not take place due to a conflict with the SOCA appeal. My hope is that this appeal will still take place, perhaps in November of this year.

I wrote in the spring 2018 report that my term on the Metropolitan Council would end this year. A new clergy representative for the Midwest will be chosen at the next Diocesan Assembly. After consulting with Archbishop Melchizedek, I asked Fr. Antonio Perdomo to take the chair of the Committee and he has agreed. This change will take place pending the blessing of His Beatitude, Metropolitan Tikhon. I know that there will be additional changes to committee membership. I hope that other members of the Metropolitan Council will agree to join in this work. It has been an honor and privilege to serve on the Metropolitan Council these past eight years and a pleasure to work with those who served on the Charity Committee.

Respectfully submitted,



Archpriest Alexander Kuchta

# Ethics Committee Report for Fall 2018 Metropolitan Council

No Written Report

# Finance/Investment Committee Report for Fall 2018 Metropolitan Council

See Treasurer's Report

# Human Resources Committee Report for Fall 2018 Metropolitan Council

No Written Report

# Internal Governance Committee Report for Fall 2018 Metropolitan Council

No Written Report

**LEGAL AFFAIRS REPORT: A COMBINED STATEMENT OF THE LEGAL COMMITTEE OF THE METROPOLITAN COUNCIL AND THE GENERAL COUNSEL OF THE ORTHODOX CHURCH OF AMERICA**

FALL SESSION OF THE OCA METROPOLITAN COUNCIL  
SEPTEMBER, 2018

At the meeting of the Diocesan Council of the Diocese of the South held in conjunction with the 19<sup>th</sup> All-American Council in St. Louis, the Chair of the Legal Committee of the Metropolitan Council did not stand for reelection to her position as a delegate of the Diocese of the South to the Metropolitan Council of the OCA. Accordingly, the chairmanship of the Legal Committee of the Metropolitan Council now stands vacant pending a determination by the Metropolitan and the Holy Synod as to both the membership of that Committee and an appointment of its Chair.

This statement is a combined report of principal activities of the Legal Committee of the Metropolitan Council and the Office of the General Counsel of the OCA regarding selected matters which have drawn the attention of the LCMC and the OCA GC since the Spring 2018 Session of the Metropolitan Council.

1. In the belief that it would be helpful to all of the members of the Metropolitan Council, and especially to those members who have joined the MC in the past year and are relatively new to the work of this body, to be reminded of the basic organization, charge and responsibility of this particular Committee. The Legal Committee will regularly provide a summary written report from that Committee to the members of the Metropolitan Council in connection with each of the semiannual meetings of the MC with respect to matters of current legal interest or concern to the Orthodox Church in America insofar as these relate reasonably to the functions and role of the Metropolitan Council in the overall governance of the Church as defined in the Statute of the OCA.<sup>1</sup>

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<sup>1</sup> Article V, § 4 of the OCA Statute provides in this respect:

"The Metropolitan Council:

Implements the decisions of the All-American Council and of the Holy Synod in the areas of its competence;

Assists the Metropolitan and the Holy Synod in Implementing decisions within the areas of its competence;

Establishes the budget for the operations of the Church and examines all financial reports of the Church;

Supervises the collection of the assessments and fees established by the All-American Council and determines the allocation of such funds;

Organizes plans for obtaining voluntary contributions for the satisfaction of the needs of the Church;

Provides for the maintenance of the central administrative bodies of the Church and for the allocation of the general Church funds;

The role of the Legal Committee within the Metropolitan Council is objectively a limited and truncated one and must be understood as separate and distinct from other attorneys charged with responsibilities for the legal welfare of the Church, particularly the important functions of General Counsel to the Orthodox Church in America who has a broader and more defined professional responsibility to take care for specific legal interests of the Orthodox Church in America, a scope of interest and concern broader than that of the Legal Committee. Although the functions and roles of the General Counsel and the LC MC differ in fundamental respects, the two work in a cooperative, supportive and reinforcing manner.

The remaining member of the Legal Committee at the present time is Mr. David Lane, a delegate to the Metropolitan Council from the Diocese of the West and an attorney licensed to practice law in the State of California.

The Legal Committee has since the last meeting of the Metropolitan Council continued to be in contact by telephone and email, and conference calls are utilized as conditions warrant. The Committee works harmoniously with General Counsel of the OCA and with Father Eric Tosi who, in his capacity as Secretary of the Church, has a primary responsibility under the terms of the OCA Statute for legal matters within the Chancery.

The charge of the Legal Committee is stated in the Council Members' Handbook<sup>2</sup>:

*"The Metropolitan Council Legal Committee, consisting of at least three to five members, shall between meetings of the Metropolitan Council act for and on behalf of the Metropolitan Council to discharge its legal responsibilities. The Legal Committee shall work and in conjunction with the General Counsel and members of the Central Administration. Responsibility for major policy and*

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Decides on the purchase, sale, or mortgaging of property of the Church, except in cases covered in Article X, Section 8;

Maintains an inventory of all properties of the Church;

Provides for the establishment and maintenance of institutions of charity and education, as well as for publications for the propagation of the Orthodox Faith;

Determines the forms and books necessary for the keeping of records and statistical data by the dioceses, requiring all statistics necessary for reports;

Appoints officers and committees on matters within its competence;

Initiates, prosecutes, and defends all legal matters affecting the interest of the Church;

May receive reports from any department in areas within the competence of the Metropolitan Council."

<sup>2</sup> See also the original enacting resolution passed by the Metropolitan Council and blessed by the Holy Synod at the Spring 2008 Metropolitan Council meeting (cf. Motion at paragraph 10.4 on page 11 of the minutes thereof).

*legal decisions, such as initiation of litigation and settlement of litigation, shall be retained by the Metropolitan Council as a whole.*

*The Legal Committee shall fully and promptly report to the Metropolitan Council its activities and decisions between meetings. The Legal Committee shall act by majority vote. The Legal Committee may act by telephonic meeting or consent evidenced in writing or email, or such other means as means that the Legal Committee shall determine to be useful or appropriate.”*

The minimum composition of the Legal Committee was changed to two members when the Committee was designated as a “special” committee, this in order to comply with New York laws regarding the minimum number of members of committees. This was accomplished at the Metropolitan Council’s Spring, 2009 meeting (Minutes, page 6 §D.1).

## GENERAL MATTERS

2. General Counsel has followed closely the Grand Jury presentments regarding child sexual abuse recently submitted to the Supreme Court of Pennsylvania and the Attorney General of the Commonwealth of Pennsylvania, and particularly the recommendations of that Grand Jury respecting proposed legislative revisions under Pennsylvania law governing statutes of limitation on child sexual abuses. Close study of this matter continues, but your attention is especially drawn to Report of Grand Jury, pages 307-313 (elimination of the criminal statute of limitations for sexually abusing children; creation of a two-year civil window for child sex abuse victims who could not file lawsuits previously; clarification of the penalties for a continuing failure to report child abuse; and prohibition of nondisclosure agreements regarding cooperation with law enforcement).
3. General Counsel was engaged in discussions with third-party contractors (including GuideOne and OCCIF) before, during, and after the recent AAC regarding commercial relationships with the Orthodox Church in America in light of federal regulations regarding not-for-profit corporations and the recent policy adopted by the Holy Synod respecting relationships with third-party vendors.
4. General Counsel continues and ongoing dialogue with the Synaxis of Monastic Superiors regarding potential revisions of Article XIII of the Statute of the Orthodox Church in America.
5. General Counsel served as an advisor on procedural matters respecting the conduct of the Plenary Sessions of the recent All-American Council.
6. General Counsel was active as a member of the Commission on Statutes and Canons during the recent AAC in St. Louis, Missouri. He also served as a member of the Resolutions Committee of that Council.

7. General Counsel has established a continuing liaison with the Committee appointed by the Metropolitan respecting the reorganization of administrative functions within the Chancery of the Orthodox Church in America, especially with regard to implications of the New York Not-For-Profit Law.

8. General Counsel continues to review and suggest revisions of both parish and diocesan by-laws to ensure compliance with the provisions of the Statute of the OCA as adopted in Atlanta in 2015.

#### LITIGATION

8. General Counsel continues to assist the Romanian Orthodox Episcopate of America in connection with litigation in the State of Michigan regarding claims asserted in Michigan courts by Irineu Duvlea respecting the properties of Holy Ascension Monastery in Clinton, Michigan.

9. General Counsel continues to assist the Romanian Orthodox Episcopate of America in connection with litigation in the State of Michigan regarding the status of and property rights respecting Saint Nicholas Church in Troy, Michigan.

Respectfully submitted,

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**E. R. Lanier**  
**General Counsel, Orthodox Church in America**

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**David Lane**  
**Member, Legal Committee of the Metropolitan Council**