



**ORTHODOX
CHURCH in
AMERICA**

Metropolitan Council Meeting

Spring 2016

Officers' Reports



**Meeting of the Metropolitan Council
February 16 to February 18, 2016
Officers' Reports**

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Chancellor's Report

Autocephaly and the Great and Holy Council

This is our final MC meeting before the Great and Holy Council to take place in Crete June 16-27 over Pentecost. It appears that our bishops will not be there, so our 222 years of experience as a church in America will be missing from the discussions. I say this as a simple fact, though also conscious that there is frustration about this among our bishops, clergy and faithful. On the other hand, it is also a fact that in the background there is a constant effort to build good relations with other churches, working with them at whatever levels are possible. But our autocephaly granted in 1970 by the Moscow Patriarchate is a challenge. Things would be different if we had been satisfied with remaining under a Mother Church overseas—as *all* other Orthodox churches here are (although even they will only be represented in Crete if their Mother Churches appoint their diaspora bishops to take one or more of the 24 spots reserved for each delegation.) But our forbears had the vision of an Orthodox Church rooted in and for North America. The OCA would be the seed, they hoped, for a grass-roots American Church that would in time bring together all the Orthodox bishops and the various ethnic jurisdictions into one. This would conform to the wise ecclesiology of the Orthodox tradition—one church in one place—but would also help fulfill our mission to reach out not only to immigrants of traditional Orthodox backgrounds, but to the seekers in North American society. While we are in communion with the other Orthodox Churches our autocephaly was misunderstood from the beginning and remains so. Indeed, the very issue of autocephaly is still so radioactive that it was removed from the agenda of the Great and Holy Council.

Metropolitan Tikhon has emphasized that we in the OCA need to reacquaint ourselves with our history, not just to repeat past discussions about our autocephaly, but to remind ourselves about who we are, how we got here and what contribution we can make to world Orthodoxy. We also need to stop reacting defensively to the criticism of our autocephaly by other churches.

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Why Orthodox Unity Matters

Archdeacon Dr John Chryssavgis (Ecumenical Patriarchate) recently spoke about the planning for the Great and Holy Council when he received an honorary doctorate and gave the annual Fr Alexander Schmemmann lecture at St Vladimir's Seminary on January 31st. He had just returned from the synaxis of the patriarchs that was finalizing the agenda and procedures. And he was hopeful simply because the Council is going to take

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place. This alone means it *could* be the start of regular international meetings of bishops to address the issues that face Orthodoxy in the 21st century. He is encouraged too that the patriarchs have blessed the continuation of the assemblies process in the “diaspora.” Indeed, he feels that this might be the most significant legacy of the Council. But he is distressed by the “stifling provincialism” and self-preoccupation he observes that is undermining the ability of churches to work together in single-mindedness and commitment.

Regretably, however, many Orthodox Churches seem to be retreating into a sheltered albeit stifling provincialism, which they explain—even excuse—as pastorally more urgent than concerns of collegiality and communion.

This view from an “insider” is confirmed in a very recent article by an “outsider,” the noted sociologist Peter Berger (a friend of the late Fr Alexander Schmemmann). The title alone conveys this: “Eastern Orthodox Cacophony in America.” He describes the confusing picture of Orthodoxy here and, while he appreciates aspects of Orthodox life, seriously questions whether Orthodoxy as it appears now to the American public can be a serious contender to attract the alienated.

In the case of Orthodoxy in America, I do think that its surreal diversity of ethnically defined church bodies makes it harder for individuals without the particular ethnic backgrounds to even have access to an Orthodox congregation let alone to take its truth claims seriously...[The] Orthodox voice would be better heard in America if it were more united, less cacophonous. (Peter Berger, “Eastern Orthodox Cacophony in America,” *The American Interest*, Feb 10, 2016, <http://www.the-american-interest.com/byline/berger/>)

While the OCA may well share Chryssavgis’ and Berger’s diagnosis and prescription, it’s clear that we have a long way to go to effect a cure. This is not about pumping ourselves up by blaming others. On the contrary, the Orthodox tradition teaches that we should blame ourselves first. We as the OCA are equally subject to provincialism. At the recent consultation on the OCA’s external relations called by Metropolitan Tikhon one of the participants noted that we are often guilty of acting ‘holier than thou’ when it comes to relating to the other Orthodox and to the community at large. “We need to train our clergy and laity to *engage* in their communities, with the city hall, the police, the legislatures and so on. Are we ‘holier than thou’? Are we about the ‘purity of Orthodoxy’ and thus cut ourselves off from relationships outside our parishes? Often it is the Greek clergy who are known in the community, and the OCA not at all.”

But despite our own shortcomings as the OCA, if the institutional structure of Orthodoxy is getting in the way of Christ’s mission, then it is our duty to speak up. North America faces explosive growth among the “nones” and “dones.” We must not be discouraged to reach out to them, and provide parish life that is attractive and inspiring. But we also need to keep remembering, proclaiming and pressing for the bigger vision of what Orthodoxy *could* be if we want our claims to be taken seriously.

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Chancellor's Calendar since the Fall 2015 MC Meeting (selected events)

September 2015

- 25. Accompanied MT to 9/11 Memorial NYC for visit of Pope Francis
- 29. Fr Martin Ritsi of OCMC at Chancery
- 30. Arlene Kallaur, representing OCA at Church World Service (CWS)

October

- 3. Orthodox Education Day, SVS
- 5. Fordham University, inauguration of Fr John Meyendorff Chair
- 12. DVP; Standing Synod and spiritual court procedures
- 13. Visit of CWS leadership to Chancery
- 15. Fr Sergius Halvorsen re: SVS DMin teaching; SVS Board
- 16. SVS Board
- 18-23 Holy Synod meeting, Detroit and Windsor, ON
- 23. Funeral of Fr Sergei Garklavs, Chicago
- 24-25. 100th anniversary, Christ the Saviour Church, Toronto
- 29-30 Holy Cross Seminary: "Speaking to Secular America;" installation of president
- 31. Board of SS Cosmas and Damian Human Services, Inc., Jersey City, NJ

November

- 5-9. Diocese of Alaska Assembly, Anchorage, AK.
- 10. NY-NJ Diocesan Assembly, South River, NJ
- 11. Delegation with MT to meet Archbishop Demetrios (GOA), NYC
- 12. St Tikhon's Chamber Choir Concert, NYC
- 12-13 SVS Board

December

- 4. John Della Monica, Orthodox Christian Capital Improvement Fund (OCCIF)
- 7. Russian Brotherhood Organization
- 15. Visit of Bishops from Ukraine
- 21-22. Meetings with new GC, Judge ER Lanier
- 22-23. Funeral of George Theokritoff

January 2016

- 4-7. Celebrating Theophany for Monastery of the Transfiguration, Ellwood City, PA
- 7. Preservation Technologies, Pittsburgh, PA
- 8. Russian-American Archives project
- 19. Meeting of Diocesan Chancellors and Treasurers
- 20. Consultation of OCA Office of External Affairs
- 21. Meeting of the Standing Synod
- 30. Mother of God Church, Princeton, NJ (blessing of church by Abp Michael)
- 31. Fr Basil Summer 90th Birthday celebration; Fr Alexander Schmemmann lecture, SVS

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Areas of Focus

Department of Pastoral Life: I am very pleased with the steps being taken to redevelop the Department of Pastoral Life. As you will see from Fr Nathan Preston's report as administrator there are a number of substantial tasks that His Beatitude has assigned to the Department for assisting clergy and clergy wives as they dedicate their lives to serving Christ and the Church. These include review of the OCA's clergy guidelines and clergy compensation guidelines. However, in addressing sensitive subjects of pastoral practice (especially concerning sexual issues) there is widespread uneasiness about the level of trust that makes open conversation possible. So we have quite a bit of work to do before we can even gather the facts about what pastoral issues are being faced in our parishes (and how.)

Board of Theological Education/Diaconal Vocations programs

At the Fall meeting of the Holy Synod it became apparent that there is a need for a thorough review of the diaconal training programs currently available as well as consideration of possible alternative programs for priestly training for suitably qualified candidates. More focused attention is also needed on bringing together the bishops and seminaries to think about the training and programs that will be in the best interests of the Church. A discussion at the Diocesan Chancellor's and Treasurers meeting (1/19/16) that was meant to raise the question of how the OCA could take better responsibility for funding seminary education (at least 1% from every parish, for example) led unexpectedly to a wide-ranging conversation about seminaries and their responsiveness to the Church's needs and resources. His Beatitude is planning to bring the leadership of the seminaries (and their boards) to meet with him (and possibly members of the Synod) later this Spring.

Clergy matters: conversations with the Metropolitan, Barry Migyanko, Fr Eric Tosi, bishops, seminary staff, chancellors, deans, priests and deacons continue on a daily basis to address a wide range of issues both routine and exceptional.

ORSMA (Office for Review of Sexual Misconduct Allegations): Cindy Heise's report gives a picture of ORSMA's current caseload and activities. Gratefully, we have been able to shift from constant putting out fires to training and prevention while continuing to address complex misconduct cases. We have a team of excellent professionals as consultants to ORSMA and who work together very well: Bernard Wilson (investigative consulting), Robert Koory (legal) and Dr Albert Rossi (mental health.)

SMPAC (Sexual Misconduct Policy Advisory Committee): The members of SMPAC now meet monthly for 90 minutes to review misconduct cases and address policy and procedure questions. The members work effectively together to ensure the safety of our parishes, monasteries and church institutions. In 2016 our goals include:

- a. Continued review of cases and their handling
- b. Consolidation of lessons learned and reporting periodically (with ORSMA) to the MC and the HS

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- c. In-depth review of compliance reports and development of ways to assist in achieving improved compliance
- d. Developing a Holy Synod Day of Reflection and Training
- e. Review of OCA/ Diocesan/ Seminary/ Parish educational programs and training to prevent sexual misconduct
- f. A complete review of the PSPs, SMPAC and ORSMA practice; the aim of which is to have an integrated approach to revising these and learning from past mistakes.

Towards goal (f), Cindy and I conducted individual interviews with the bishops to get their assessment of how the PSPs have worked in practice over the last few years. Cindy summarized this very helpful information in the attached report.

I am grateful to all the SMPAC volunteer members for their dedication and commitment: Dr Rossi, Bernard Wilson, Robert Koory, Fr Alexander Garklavs, Pdn Peter Danilchick (Metropolitan Tikhon, Cindy Heise, Fr Eric Tosi and I are ex-officio members.) While attorney Robert Koory is the Special Legal Liaison for SMPAC and ORSMA, the OCA's new GC, Judge ER Lanier, is also invited to participate in SMPAC meetings.

Respectfully submitted,

Fr John A. Jillions,
Chancellor

February 16, 2016

Survey on the Policies, Standards,
and Procedures on Sexual Misconduct
Holy Synod of Bishops

1. What is the most difficult thing for you as a bishop in dealing with issues of sexual misconduct in the church? (eg. length of investigations, cost of investigations, informing the respondent, how to meet the needs of the victim, communicating with the parish, disciplining clergy who have been found guilty, etc.)

The most expressed concern is that of the **length of investigations**. The often prolonged nature of investigations leaves everyone in “limbo”: the accused, the victim/complainant, and the parish. This has a significant impact on the spiritual and emotional well being of everyone involved. A swift resolution can help people to move on once an outcome is determined. Counseling and healing can then begin after the case is closed.

The next major issue is the **cost of investigations**. With three person response teams, the travel expenses can be very high. For a very small diocese, this can be crippling. Also, the cost of providing counseling to victims can get high. It has not been determined what an appropriate amount of after-care is needed for victims of sexual misconduct.

The third top issue for bishops is the **disciplining of clergy** after sexual misconduct is substantiated. Some have difficulty enacting the appropriate discipline on a clergyman. Furthermore, the impact on the families of clergymen can be great.

Other difficulties that were identified are the following:

- Language and cultural barriers
- People tend to assume guilt when an allegation comes in
- Transferring of a priest from one diocese to another
- There does not seem to be a distinction in process between cases involving two adults versus an adult and child.
- Cost of background checks.

a. As it relates to clergy?

Supervision of clergy was identified as a common issue, especially once he is found guilty of misconduct. Isolation and distance make it difficult for a bishop to provide adequate oversight of his priests.

The next biggest concern was the **publicity of an accusation** of misconduct. The announcement of an accusation to a parish creates stigma. Even if the accused is exonerated after an investigation, there is doubt in people's minds about him. The laity often automatically assume guilt when the accusation is made public.

- Informing and disciplining clergy
- There are some cases in which the clergymen do not listen to the bishop.
- Difficult to provide pastoral care to the accused/guilty when they are in isolated areas.
- "People (the accused) are pushed aside rather than embraced."
- Any clergyman in AA should have a male sponsor.
- Clergy tend to hide their problems from the bishop such as mental illness or alcoholism because they are afraid they will lose their job.
- Unless the bishop has a good **relationship** with their clergy, they will hide their problems.
- There is a perception that the PSPs set up a tension between bishop and priest which can cause mistrust.
- Support needs to begin as soon as an allegation is made to the accused
- The bishop can't get directly involved (nor the local priest)
- While on leave of absence, the salary of the accused should go into escrow
- Follow-up and aftercare is critical in cases where the misconduct is substantiated.

b. As it relates to the laity?

- There doesn't seem to be enough in the PSPs in how to respond to victims. There is only one short section concerning the assistance to victims.
- We need to explicitly define how much support we give to victims. This needs to become a priority.
- Support needs to begin as soon as an allegation is made to the victim / complainant, not after the investigation is done.
- The stress and anxiety that is caused among the laity in a parish where a priest is accused
- Ostracizing of the victim by some in the parish

2. What is the greatest problem the PSPs cause for you in your role as diocesan bishop?

Compliance issues were identified by every bishop. Obtaining background checks and compliance reports is difficult; people are not yet accustomed to doing them and many just don't understand the need. The cost is also an obstacle.

The following concerns were identified:

- Not having any schooling in legal and psychological matters.
- There is a perception that the PSPs override the canons
- Spiritual court process
- The PSPs need to be brought into line with local or national laws (eg Canada and Mexico).
- State and insurance requirements for background checks - this creates confusion for the clergy.
- Not knowing exactly what to do when an accusation is made - would like a step by step process written out.

3. What do you find most helpful in the PSPs?

- Having an independent team conduct the investigations

4. What help do you need in:

a. Dealing with issues of communication in cases of sexual misconduct allegations, investigations or findings?

- How or what to communicate to involved persons during the course of an investigation so they are not left wondering what is going on.
- The accused should be notified by the bishop, whether clergy or lay person.
- Report of an accusation should be relayed to the accused in person if at all possible.

b. Dealing with parishioners/parishes?

- Explaining to a parish the process of investigations from the beginning; someone local should be appointed to do this. Telling them that this could be a long process would be helpful.
- How / when to tell people about the offender.
- Simple guide book for parishes undergoing investigation

c. Dealing with the accused?

- Encouraging them to be honest; but, then we “reward” them with suspension or other punishment.
- Supervision of clergy or lay people who have been found guilty of misconduct.
- Disclosure to the parish regarding those guilty of misconduct
- Understanding what leads to misconduct; psychological factors, etc.

6. What do you feel you need more education/training on as it relates to sexual misconduct?

Top priority: Healthy boundaries

Legal issues

Pastoral response

What leads to misconduct by clergy

PSPs in general for the clergy

More practical education for the clergy (role playing? case studies?)

Other comments:

- The PSP process should differentiate adult cases versus cases involving minors.
- For adult cases, can it be more private and pastoral? This way, public scandal and stigma can be avoided until a final decision is reached.
- In other organizations, they don't make the accusation public; an investigation is conducted privately. Only when something is proven should an announcement be made.
- The PSPs do not adequately reflect the canons. Specifically, the PSPs do not address the canon in which the accuser's character should be judged.
- Clergy serving on a spiritual court need training in mental health issues and investigative techniques.
- Clergy peer groups will help in prevention
- The PSPs do not address supervision process if a person is found guilty of misconduct by an RT.
- There should be a debriefing with the RT and spiritual court once a case is finished.
- The interview process during an investigation can be "brutal" for those being questioned
- The canons are part of the church; they have to outweigh the PSPs. The procedures of canons need to be taken into account. Specifically, the character of the accuser should be considered. The idea that the PSPs direct the bishops is a canonical anomaly. In this matter, it appears that SMPAC/ORSMA team directs the bishops.
- It is frustrating to decide on something and then told later that it was the wrong decision. The advice needs to come up front before the fact.
- The Church needs to be independent of external pressures such as SNAP and Prokov. There needs to be more time to review what they are saying rather than having knee jerk reaction. The Church needs to take its own time to do things. We should take it as not

an issue for them to resolve through the church, but for us the resolve without appealing to others (outside organizations). They are not our watchdogs.

- Canon law seems to be disregarded in the PSPs.
- The measure of “guilt” is “beyond a reasonable doubt” according to the canons. There is a disparity with the PSP measure of guilt/substantiation. We need to reconcile this disparity between the canons and the PSPs.
- The OCA should have a department of background checks; the process should be centralized to make it uniform across the OCA; people are inexperienced in reading a criminal background check
- There is a perception that the PSPs are replacing the canons.

Secretary's Report
Archpriest Eric George Tosi
Spring 2016 Metropolitan Council Meeting
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1. Overview

The Church work begins with renewed vigor as we move from the All-American Council into the next triennium. Much of the work will be concentrating on enacting the decisions of the AAC but there will be some new initiatives which will be recounted in this report. His Beatitude has been very proactive in directing and guiding the Chancery Officers as we work in implementing his "Four Pillars" over the next triennium.

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

2. Human Resources

The staff remains stable though there are some lingering questions on how to best utilize the limited number of people. It is imperative that we all work in a number of areas in order to keep ahead of the work load. However, in some cases this is difficult due to travel and other requirements necessitated by the operations of the Central Church Office. The addition of Raymond Boyd in a part time function has enabled SOCA to move forward. Roman Ostash received his extension for his R-1 visa and awaiting the Green Card.

The Employee Handbook has been handed over to the Human Resources Committee to review and modify. The first round of suggested changes has been sent and a final copy for approval will be forthcoming. I do not expect there to be any major changes rather some tweaking in certain areas. I do recommend that the Best Practices Policy also be reviewed periodically to ensure that we stay current on the latest guiding principles and laws.

The only other major issue which will need to be examined over the coming years is a succession policy for a number of critical areas in Church operations. While this is not an immediate need, we should be looking into certain areas and ensure that we are identifying and developing new talent who lead in the next generation. This is an important part of the Holy Synod's task and the Metropolitan Council can provide valuable input.

3. Operations

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

I would be remiss if I did not remind the Metropolitan Council on two areas of operations that need to be seriously discussed as they affect budgeting and operations. The first is the continued look at the organization of the Commissions, Committees, Departments and Offices. There have been several proposals over the past years and none of them have gained any serious traction. However, we will face a tightened budget as well as a continued need to evaluate what is necessary for the operation of the Church. We should not let the next triennium pass without a serious discussion and proposal put forward for the Synod. Likewise, we do need to examine at periodical points the leadership and membership in these various organizations. This is not meant to push anyone away but rather to identify new talent and develop the next generation of leaders for the Church. Some of the current leadership have asked to step down and have asked a very important question: How do we choose their replacement? I am not sure we have a systematic and consistent method in place. This should not be allowed to continue and we need to really examine this and present proposals which can build on what have already been presented.

As with last year, there will be a Mission School this spring. I am currently working on the plans but it seems that the end of May will work best. We will probably use the same method of choosing students (one clergy and one lay person from each diocese). The location is yet to be determined though a number of bishops have expressed the desire to host it in their diocese.

We are pleased that the GAP Church Insurance program with Insurance Systems was able to return this year a total of over \$36,596 to participating parishes. The program returns a percentage of money to parish insured through them when there is little loss. We continue to do well and look forward to continuing the program.

I also must point to a continued and growing issue in parish life and that is the issue of health insurance. The current cooperation with the Orthodox Health Plans is modest (only 90 clergy participate) and the growing costs are pricing it out of the market for most OCA clergy. The rising costs of such plans are now making it difficult for a parish to pay a priest AND cover health insurance (in some cases the health insurance is more than the actual salary paid to the priest). I do know that other jurisdictions are facing the same issue and also do not have a solution. I would propose that we gather a few health insurance experts from the OCA to discuss possible alternatives that can be presented to the Church. As a reminder, it is mandated by the Holy Synod that such insurances (and the pension) is to be provided for by the parishes in the clergy compensation package.

While I will not go into detail about legal work, as that will be reported separately, I would note that there continues to be strong cooperative effort with the Legal Committee. There were a few legal issues that were worked through which involved areas as diverse as contracts to threats of legal action. The new General Counsel, Judge E.R. Lanier has taken a very proactive approach to some issues which we will face in the future including the impact of the *Obergefell* decision. As part of that impact, we have reviewed the wording for a new "Religious Expression Coverage" that will be provided by various church insurance providers so that it will be in accordance with the teachings of the Orthodox Church. While this coverage is not yet available in all states (New York being one of the states not yet providing coverage), this coverage will be increasingly valuable over the next few years as we begin to receive legal threats and challenges.

Another growing concern is the rising costs of background checks. While the OCA has negotiated a reasonably priced program, the individual parishes have not been able to negotiate the same pricing. I will be working over the next few months to provide reasonable cost solutions to the parishes so the program can continue as directed.

Discussions have begun with the RBO to look into providing life insurance to members of the clergy and church workers of the OCA. The plan is very reasonable and can provide some limited relief to clergy families. Of most critical concern is enabling clergy families to cover the cost of funerals which all too often the family is unable to do. More discussion on this needs to happen.

4. Councils and Synods

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

And believe it or not, we will begin the planning process for the 19th All-American Council this summer. We will be putting together our Request for Bids to Conference Direct and begin to visit anticipated sites. It has been suggested that the Northeast and Midwest be the top priority for the next AAC. I will be utilizing Dn Peter Ilchuk as Logistics Manager. The new AAC iconostasis is now safely ensconced in the Metropolitan Theodosius Museum at St. Tikhon's Monastery. We will be refining the electronic registration system for the next Council.

5. Archives

The Archive's project is moving forward. On the recommendation of the Archive Committee we have contracted a local specialist who will be examining the archives paces and provide recommendations on improving the storage conditions. The expert will

also be looking into alternatives for storage of the most important items. After the report is complete, we will hold the next round of meetings to discuss moving forward with the Archives. There is still much work to be done on cleaning and organizing the limited space and we will work with an intern this summer to continue the project.

Alex Liberovsky continues his work in the Archives in providing information and doing presentations on the history of the OCA. His report is in the packet.

6. Estate Management

The expected pool removal will most likely not happen this year as the expected budget surplus did not materialize. We do need to continue to place this at the forefront of any projects due to the liability we can potentially incur. Other such projects that we will need to plan are the expected roof replacement in a few years and the need to repave the driveway and parking lot which are beginning to show its wear. Another potential project is the replacement of the front and chapel doors which are also very old, drafty and not in the best shape. Of course they are custom sized doors so the expense of this is not cheap. While none of these projects are immediate, we do need to plan for them as they will be a considerable expense.

Planned projects over the next six months include some window repair, some minor repair work around the building and continued maintenance of the grounds. We did repair all of the fire place and chimneys in the building (there are six) and they are now functional except for a gas fireplace in the Metropolitan's residence which needs to have a new gas line connected. We should also power wash the building this summer (it has been over five years) as the mildew from the Long Island summers does build up. I also expect to hire some seminarians this summer to clean the attics and paint the third floor.

7. Communications

This portion of my job takes a considerable time, often during the weekends and off-hours. We have a great team and even though Fr. John Matusiak has retired from parish ministry, he will continue as our senior editor and writer. We are in daily contact and often plan articles and postings well in advance. Jessica Fuhrman and Ryan Platte continue to provide technical support.

The new *OCA Review* has been a big success and is released at the end of every month. This will continue. The first *OCA Journal* will be released this spring with a focus on missions and evangelism in the Church. We expect to release this annually. The annual Desk Calendar was also released.

The OCA Communications Team held its first summit this December. A number of items were discussed which included communications policy, utilization of social media, the effectiveness of the website, and the need to recruit new writers and communications specialists in the various areas of media.

Among the most critical decisions was to refresh the OCA website. As a reminder, the OCA website was completely overhauled in 2011. This overhaul included not only the new look for the site but the entire backend of the site. This is where most of the cost of the project was incurred. It was agreed that every few years, the site should be reviewed and updated in order to stay current. It has now been five years and we have considerable data which can now go into the redesign. A prospectus has been prepared (attached) which has gone out to selected bids. It should be noted that this is to refresh the look and ease the navigation of the site; it is not a complete redesign or rework. This will keep the cost low. His Beatitude and other team members have offered insightful comments on the website and this will greatly assist in the project. Such areas as new home page, easier navigation to material, seamless integration with social media, better search engines and cleaner archives are the most important areas of consideration. While there is no money for this project, the bidding process should give us a good idea of the costs and then we will try to find the money for the project. This is a very important project since the website is the face of the OCA and the singular place for news and material on the Church. It cannot be neglected.

We are working in cooperation with SVS Press to publish the new metric book for clergy but the project stalled. We will pick this up over the next few months as there is a growing call for this by parish priests. We are also looking into updating and republishing the so called "Red Book" and the History of the Orthodox Church in America book.

8. Crisis Management

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

9. Other

A continuing major project is the work on the clergy and chancery database. While most of the major work is completed the remaining work is continual refinement along with working on the needed report generation. Much thanks must go to Barry Migyanko and Ryan Platte who have spent many hours working through the issues. As a note, as we got deeper into the old database, we uncovered some major issues and glitches, not to mention unknown sections, which all had to be thoroughly examined and dealt with before moving forward. One misstep could have created new problems. Much of this work was put on hold for the AAC and we have now set new priorities and timelines. The ultimate goal is for dioceses to have limited access to their section of the database so they can update their information as well as generate their own reports. Over the next year there will be a new master mailing list compiled, working systems efficiently generated and integration into Raiser's Edge, Financial Edge and the OCA website.

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

I also continue to work with the Eastern Orthodox Committee on Scouting and the Religious Relations Task Force of the Boy Scouts. I will be the Assistant Chief Chaplain at the 2017 National Jamboree and the Chief Chaplain at the World Jamboree in 2018 (a first for the Orthodox). The witness we provide to such events are incredibly important and we need to continue this work.

I do continue to accept, with His Beatitude's blessings, invitations to speak on evangelism around the world. I was present at the Archdiocese of Western Pennsylvania Assembly as well as some other OCA events. I have been able to speak at the WCC Evangelism Summit in Nashville, TN and the Orthodox Lausanne Consultation in Finland. I have been re-invited to speak at the Diocese of Sourazh, this time in Madrid, Spain. I have also provided a few articles and a chapter in a book on evangelism. I also do travel with His Beatitude or on behalf of His Beatitude on occasion for official visits or events.

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



Prospectus for www.OCA.org Redesign

1. Project Design Scope:

The OCA.ORG website is the official communications medium for the Orthodox Church in America. It consists of a wide variety and large amount of material and resources for both the members of the Orthodox Church in America as well as for those interested in the work of the Church. The current website was redesigned and redeveloped in 2011 which included much work on the technical aspects of the website as well as a new look. Much of the material was reformatted, realigned and migrated to the new site. Since it is now five years after the redesign, the website needs to update its look, realign the material and make navigation easier and more efficient. The project is based on a redesign and thematic changes rather than creating a new website.

- The site must have a more religious and church concept around its look and navigation
- There should be a new homepage which keeps the navigation above the fold and directs to different thematic areas. Each of these areas will need a consistent and redesigned theme which aligns the sections of the website with each other. It is estimated to be 4 to 6 subsections. The team will provide suggested landing page design with forms and call to action buttons needs
- There should be a new navigation to social media sites that are utilized by the OCA
- Indexing will be redone to be consistent with provided categories in order to make navigation simpler and more efficient with a minimum amount of sub-categories
- The homepage may need to have rotating content based around news integrated with content that will remain either highlighted for longer or indefinite periods
- Church-wide organizations and resources will need to be more easily located and utilized
- Other work on important aspects of Church life will need to be highlighted
- Designer must be able to grasp and demonstrate understanding of the OCA aesthetic — design survey results available upon request.
- Must be able to complete work in project boundaries. The expected Start date is June 1, 2016. Designs due March 15, 2016.
- User experience and information architecture critical to project: designer must have demonstrated experience in site architecture.
- Designer must be able to work with current technical team and material including:

- Semantic HTML5+CSS markup
- Our team will deploy design using ExpressionEngine
- Pages must load in < 5 sec over SSL on a phone (specs: webpagetest.org, Dulles VA, iPhone 6 over a 780 Kbps 3G connection with 200ms latency)

2. Bid requirements:

- Total amount, and breakdown, of design fee.
- List of sites designed, and portfolio.
- Cover letter that explains why you are the right designer for this project, and what you see as the critical needs of www.oca.org as you evaluate the existing site and look towards an upgrade.
- Three client references.

3. Deadlines:

Bid package should be sent by March 15 to Archpriest Eric G. Tosi, PO Box 675, Syosset, NY 11791; egtosi@oca.org .

4. Questions? Please contact Archpriest Eric G. Tosi at egtosi@oca.org

**OCA ARCHIVES ADVISORY COMMITTEE
REPORT TO THE METROPOLITAN COUNCIL
Spring 2016**

Members

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

Consultants

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

Mission Statement:

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

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

At the Fall 2015 Metropolitan Council meeting, the Committee requested and received funding for consultants to evaluate conditions in the current facility. The evaluation will be two-fold including a comprehensive assessment of the building by an environmental engineer, and a preservation assessment by a conservator who will project the life expectancy of the collections under current conditions. As the calendars of these highly specialized consultants are booked months in advance, their assessment visit was scheduled to take place on February 11, but has been postponed due to the tragic death of a family member of the lead consultant. The visit will be rescheduled at the consultants' earliest convenience. The Committee looks forward to receiving the findings and recommendations of the consultants which, to a large degree, will determine the future direction of the Committee's work.

As was stated in the comprehensive report on the work of both the OCA Archives and that of the Advisory Committee, presented to the 18th All-American Council last summer, the Archives continue to serve the Holy Synod, the chancery administration, the Church at-large, as well as outside researchers, by responding daily to a wide variety of historical inquiries and occasional requests for help with practical archival issues. Additionally, visitors are received regularly for

onsite research. The Archivist continues to deliver historical presentations by invitation to parishes and at other venues as funding allows. An opportunity to make the OCA Archives more accessible to the global academic community has surfaced through a new initiative, which is still in a very preliminary stage, to make a wide range of archival collections documenting Russian-American history in both countries accessible online. The OCA Archivist had an initial meeting concerning the possible participation of the OCA Archives in this extensive project, which is proposed to include the Kennan Institute as principal US partner.

Last summer, through an internship program at Adelphi University linking students with local not-for-profit organizations, an intern was employed in the OCA Archives for three months. Compensation for interns in this program is funded by the university. This proved to be a productive arrangement and the intern will likely pursue an archival career as a result of her internship experience in the OCA Archives. Due to the success of last summer's internship, the OCA Archives will participate in this program again this summer.

Your ongoing prayers are requested for Committee member, Gregory Shesko, who has been battling advanced cancer for several months. He is responding well to treatment and continues to maintain an active schedule.

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

Respectfully submitted,

Alexis Liberovsky
OCA Archivist
Secretary – Archives Advisory Committee

February 2016 report on technology services

Ryan Platte, Technical Manager, Orthodox Church in America

During the time since my last report, I have provided personal support and maintained a growing number of systems while optimizing efficiency and costs.

Personal support

- Account support tasks such as account creation, password resets, user assistance by phone, and restoration of accidentally deleted data
- Respond to website support requests
- Set up Pastoral Department with survey tool
- Provided various data to support decision makers
- Participate in planning of redesign

Technical work

- Maintained systems for websites and internal Chancery DB
- Updated feasts & saints and scripture readings systems to address errors in calendar, content, and other defects
- Mitigate attacks on our websites
- Added features to Chancery DB software
- Updated website features to address changing needs
- Transitioned offsite backups to a more effective system
- Patch systems in response to announced security vulnerabilities
- Switched to new, less expensive CDN service with better features
- Made it possible to use website via SSL

Content posting

- Posted clergy photos from AAC
- Posted videos

The 2015 projects to retire old services and transition to leaner hosting have been carried over to this year and are proceeding. The work mentioned above on both the backup and CDN changes is part of the stepwise process to improve our systems and reduce recurring expenses.

**Orthodox Church in America
Treasurer's Report
February 2016**

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

This report presents the preliminary internal financial results for the year ended December 31, 2015, a final recap of the 18th All-American Council, and an update on Stewards of the OCA and other gifts and bequests.

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

Preliminary 2015 Financial Results (Exhibits A & B)

Exhibit A – Comparative Balance Sheets: Our balance sheet as of December 31, 2015 shows:

- Total assets of \$2,897,185;
- Total liabilities of \$336,426 (including Reserves of \$49,000 with \$10,000 reserved for Archives Consultant and Equipment and \$39,000 for Seminaries);
- Net Assets of \$2,560,759.
- Total cash is \$185,750, of which \$98,191 is unrestricted.
- Assessments Receivable of \$120,049 include December assessments of \$66.9K (all received in January) and Guide One Group Insurance rebate of \$36.6K.
- Bequest Receivable includes \$491K from the Weigel estate and the balance of \$41K from the Morse Missions bequest.
- Prepaid Expenses of \$14.3K include 2015 Blackbaud maintenance fee(\$11K), postage machine lease(\$3.3K).
- Liabilities include \$90K in payables and accrued expenses, \$7K due to the Diocese of the South on the Metropolitan JONAH loan, \$36K in retirement obligation to Mat Glagolev, and Reserves for Archives Consultant (\$10K) and 2015 Seminary Distribution of \$39K.
- Our net assets at the beginning of the year were \$2,640,687, and with the net deficit for the year of \$79,928, the balance at December 31, 2015 is \$2,560,759.

Exhibit B – Detailed Actual versus Budget

The 2015 budget projected a net surplus across all funds of \$3,395. Our actual result was a deficit of \$79,932, for a negative variance of \$83,327. However, the deficit was the result of unrealized investment losses in our permanent endowments. The Operating Fund had a small surplus of \$8,073, and the Temporarily Restricted Fund had a surplus of \$6,091. Exhibit B-1 is a one-page Recap of the activity for the year. Exhibit B-2 presents the details by department for 2015.

Highlights of the results are as follows:

Unrestricted Funds:

- Revenues – Total revenues were over budget by \$31,167, with \$18,271 in assessments; \$7,363 in general contributions and \$5600 in Continuing Ed Workshop revenues.
- Expenses – Total expenses were under budget by \$18,524, with the bulk of this in the Administrative area due to lower Legal fees (\$34.5K). Other departments' variances were as follows:
 - Executive Expense was under budget by \$2.4K due termination of medical insurance premiums for Metropolitan JONAH's.
 - Holy Synod was under by \$2.8K due to the termination of the stipend to Metropolitan JONAH in July 2015.
 - Metropolitan Council expenses were under-budget by \$9.4K due to the change in venue to the Seminary.
 - Property Support was over budget by \$8K due to grounds upkeep.
 - Communications and TOC was under budget by \$19.3K due to no additions of the TOC being printed.
 - External Affairs was under budget by \$14.5 due to lower travel and telephone expenses.
 - Other Special Commissions:
 - ORSMA – Expenses of \$85K were under budget by \$3.9K.
 - Strategic Planning, which includes the Office of Continuing Education, was over budget by \$2.9K.
 - Psychological Testing was over budget by \$4K.
 - Preconciliar/AAC expenses of \$39K, representing a net loss on the 18th AAC were covered in the Operating budget.
 - Total Operating Results were a surplus of \$80,805 vs budget of \$31,114.
- Stewards of the OCA:
 - Revenues of \$59,629 include:
 - \$53.1K in Stewards donations;
 - \$6.5K in DVP and Liturgical Music Program fees.
 - Total revenues were under budget by \$407.
 - Expenses of \$130,236 were over budget by \$31,210 and include the following:
 - Conference and general expenses of \$2,788;
 - Departmental expenses of \$129,572.
- Net Operating Surplus of \$8,074 vs budget of \$(10,000).

Restricted Funds:

- Temporarily Restricted Funds: Total revenues were \$365,219, including \$340,334 in AAC Revenues. Expenses of \$359,128 include the required

annuity payments, \$340,334 in AAC expenses, and \$12,506 in distributions to the Seminaries.

- Permanently Restricted Funds: We had revenues of (\$54,324) and distributions and expenses of \$39,772 for a net deficit of \$94,096.

18th All-American Council Final P&L (Exhibit C)

The Final 18th-AAC recap shows the following:

- Preconciliar Expenses of \$39,670 vs budget \$35,000, for a negative variance of \$4,670. These expenses included all the work and travel expense for the Statute Revision Committee.
- The net deficit from the Council itself was \$24,255, which was then covered by the 2015 Operating Budget. Our revenues were under budget by \$26,783, due to fewer observers and youth program participants than original budgeted. In addition, parish assessments of \$24,426 were written off due to non-payment by the parishes.
- Expenses for the Council itself were \$21,542 over budget in the Consulting area:
 - \$4,500 for a Legal Editor related to the Statute Revision;
 - \$14,532 for the AAC website and IT technical consultant.

Stewards of the OCA and Other Donations – 2015 (Exhibit D)

Exhibit D shows all donations by category for 2015 vs 2014.

For 2015 we had 99 stewards contributing a total of \$53,911 as compared with 60 stewards and \$35,126 in 2014.

5th Annual Chancellors/Treasurers Meeting:

The 5th annual Chancellors/Treasurers Meeting was held in Syosset on January 19, 2016, with eight dioceses represented. Each diocese spoke about their transition to remitting their assessment according to the proportional formula of the Finance Resolution. While the dioceses continue to operate differently, there has been a dramatic, positive shift towards proportional giving in most of the dioceses, with the DOS and DOW assessing their parishes on a proportional basis. Other dioceses such as DEPA and DNYNJ, while still not completely on a proportional assessment basis, have made significant strides and have plans to move to a proportional system in the next 1-3 years. The interaction and exchange of ideas, policies and procedures among the treasurers was overwhelming; these accomplished, dedicated servants have developed a comradery that benefits their own dioceses and the entire Church.

Respectfully submitted,

Melanie Ringa

Melanie Ringa

Treasurer

Orthodox Church in America
Comparative Balance Sheets
As of Dec 31, 2015 and Dec 31, 2014

EXHIBIT A

	Dec 31, 2015	Dec 31, 2014
ASSETS		
Current Assets		
<i>Unrestricted</i>		
Commerce Checking- Operating	\$ 77,226.00	\$ 57,020.00
Commerce Bank- Payroll	\$ 1,732.00	\$ 11,098.00
Astoria Bank- St.Sergius Chapel	\$ 18,659.00	\$ 18,920.00
Honesdale National Bank	\$ -	\$ 15,701.00
Petty Cash- Chancery Office	\$ 574.00	\$ 1,463.00
	\$ 98,191.00	\$ 104,202.00
<i>Temporarily Restricted</i>		
Commerce Bank- All American Council	\$ 5,233.00	\$ 51,374.00
Commerce Bank - Restricted	\$ 42,922.00	\$ 40,260.00
Commerce Bank- Reserved	\$ 39,404.00	\$ 39,384.00
Honesdale Bank Money Market	\$ -	\$ 744,073.00
	\$ 87,559.00	\$ 875,091.00
Total Cash	\$ 185,750.00	\$ 979,293.00
Accounts Receivable		
Assessments Receivable	\$ 120,049.00	\$ 85,443.00
Pledges Receivable	\$ -	\$ -
Desk Calendar Receivable	\$ -	\$ -
Total Accounts Receivable	\$ 120,049.00	\$ 85,443.00
Other Current Assets		
Bequest Receivable	\$ 503,025.00	\$ 554,747.00
Due from OCA Pension Dept	\$ 7,532.00	\$ 7,062.00
Prepaid Expense	\$ 14,255.00	\$ 24,856.00
Other	\$ -	\$ -
Total Other Current Assets	\$ 524,812.00	\$ 586,665.00
Total Current Assets	\$ 830,611.00	\$ 1,651,401.00
Fixed Assets		
Plant Fund - Real Estate	\$ 45,000.00	\$ 45,000.00
Plant Fund Building & Improve	\$ 531,783.00	\$ 531,783.00
Plant Fund Furniture & Equip	\$ 55,399.00	\$ 23,521.00
Plant Fund Auto & Garden Equip	\$ 96,172.00	\$ 96,172.00
Plant Fund Computer Equip	\$ 27,602.00	\$ 27,602.00
Plant Fund Software	\$ 33,000.00	\$ 33,000.00
Plant Fund Chapel Equip & Furn	\$ 25,000.00	\$ 25,000.00
Construction in progress (Iconostasis for AAC)	\$ -	\$ 31,878.00
Accum Deprec Bld & Improvements	\$ (353,779.00)	\$ (341,592.00)
Accum Deprec Furn & Equip	\$ (25,115.00)	\$ (23,521.00)
Accum Deprec Auto & Garden Equip	\$ (84,707.00)	\$ (75,006.00)
Accum Deprec Computer Equip	\$ (22,916.00)	\$ (18,950.00)
Accum Deprec Computer Software	\$ (33,000.00)	\$ (33,000.00)

**Orthodox Church in America
Comparative Balance Sheets
As of Dec 31, 2015 and Dec 31, 2014**

EXHIBIT A

	Dec 31, 2015	Dec 31, 2014
Accum Deprec Chapel Equip & Fur	\$ (25,000.00)	\$ (25,000.00)
Total Fixed Assets	\$ 269,439.00	\$ 296,887.00
 Restricted Investments and Trusts		
Fellowship of Orthodox Stewards	\$ 63,589.00	\$ 68,924.00
J McGuire Trust	\$ 209,910.00	\$ 209,563.00
Kavalenko Nimcrut	\$ 72,446.00	\$ 78,250.00
St. Andrew's	\$ 95,376.00	\$ 103,310.00
Main Endowment	\$ 544,700.00	\$ 477,396.00
HVIZD Annuity	\$ 89,954.00	\$ 89,954.00
Mission Endowment	\$ 721,160.00	\$ -
Wells Fargo - Quasi Restricted Bequests	\$ -	\$ 30,099.00
 Total Restricted Investments and Trusts	\$ 1,797,135.00	\$ 1,057,496.00
 TOTAL ASSETS	\$ 2,897,185.00	\$ 3,005,784.00
 LIABILITIES & EQUITY		
Current Liabilities		
Accounts payable and accrued Expenses	\$ 90,204.00	\$ 87,850.00
Deferred Revenue	\$ 8,442.00	\$ 52,966.00
Auto loan - Chase Auto Finance	\$ 12,347.00	\$ 22,048.00
Accrued endowment distributions	\$ -	\$ -
Retirement Obligation	\$ 36,310.00	\$ 47,710.00
Other (Loan Payable to Diocese of the South)	\$ 7,125.00	\$ 21,525.00
Reserves for Archives and Seminaries	\$ 49,000.00	\$ -
Total Current Liabilities	\$ 203,428.00	\$ 232,099.00
 Long Term Liabilities		
Deferred Compensation and annuities		
Hvizd Annuity liability	\$ 79,973.00	\$ 79,973.00
Deferred revenue	\$ -	\$ -
Unitrust Liab reserves	\$ 53,025.00	\$ 53,025.00
Total Deferred compensation and annuities	\$ 132,998.00	\$ 132,998.00
 Total Liabilities	\$ 336,426.00	\$ 365,097.00
 Equity		
Unrestricted Net Assets, 12/31/11	\$ (705,117.00)	\$ (705,117.00)
Temporarily Restricted Net Assets, 12/31/11	\$ 1,818,363.00	\$ 1,818,363.00
Permanently Restricted Net Assets, 12/31/11	\$ 1,020,429.00	\$ 1,020,429.00
Total Net Assets	\$ 2,133,675.00	\$ 2,133,675.00
Current Year Activity - 2015	\$ (79,928.00)	\$ -
Current Year Activity - 2014	\$ 89,175.00	\$ 89,175.00
Current Year Activity - 2013	\$ (54,791.00)	\$ (54,791.00)
Current Year Activity - 2012	\$ 472,628.00	\$ 472,628.00

**Orthodox Church in America
Comparative Balance Sheets
As of Dec 31, 2015 and Dec 31, 2014**

EXHIBIT A

	<u>Dec 31, 2015</u>	<u>Dec 31, 2014</u>
Total Net Assets	2,560,759.00	2,640,687.00
Total Equity	\$ 2,560,759.00	\$ 2,640,687.00
TOTAL LIABILITIES & EQUITY	<u>\$ 2,897,185.00</u>	<u>\$ 3,005,784.00</u>
	\$ -	\$ -
Unrestricted Surplus/(Deficit) - 2012	\$ 783,039.00	\$ 783,039.00
Temp Restricted Surplus/(Deficit)	\$ (311,942.00)	\$ (311,942.00)
Perm Restricted Surplus/(Deficit)	\$ 1,531.00	\$ 1,531.00
	<u>\$ 472,628.00</u>	<u>\$ 472,628.00</u>
Unrestricted Surplus/(Deficit) - 2013	\$ (52,031.00)	\$ (52,031.00)
Temp Restricted Surplus/(Deficit)	\$ (4,049.00)	\$ (4,049.00)
Perm Restricted Surplus/(Deficit)	\$ 1,289.00	\$ 1,289.00
	<u>\$ (54,791.00)</u>	<u>\$ (54,791.00)</u>
Unrestricted Surplus/(Deficit) - 2014	\$ 58,992.00	\$ 58,992.00
Temp Restricted Surplus/(Deficit)	\$ 26,734.00	\$ 26,734.00
Perm Restricted Surplus/(Deficit)	\$ 3,449.00	\$ 3,449.00
	<u>\$ 89,175.00</u>	<u>\$ 89,175.00</u>
Unrestricted Surplus/(Deficit) - 2015	\$ 8,073.00	\$ -
Temp Restricted Surplus/(Deficit)	\$ 6,091.00	\$ -
Perm Restricted Surplus/(Deficit)	\$ (94,092.00)	\$ -
	<u>\$ (79,928.00)</u>	<u>\$ -</u>
	\$ -	\$ -

Orthodox Church in America
Statement of Activities vs Budget- RECAP BY DEPARTMENT
 For the Year ended 12/31/15

EXHIBIT B - 1

	FINAL Budget 2015	Actual Q1 2015	Actual Q2 2015	Actual Q3 2015	Actual Q4 2015	Actual 12/31/2015	Budget 12/31/2015	Variance to Budget
Unrestricted Funds:								
Assessments	\$ 1,892,870	\$ 475,523	\$ 467,165	\$ 467,166	\$ 501,287	\$ 1,911,141	\$ 1,892,870	\$ 18,271
Contributions	\$ 2,000	\$ 1,714	\$ 2,826	\$ 1,804	\$ 3,019	\$ 9,363	\$ 2,000	\$ 7,363
Chapel	\$ 12,000	\$ 2,182	\$ 3,691	\$ 1,326	\$ 3,800	\$ 10,999	\$ 12,000	\$ (1,001)
Continuing Education Workshop Revenue	\$ 10,000	\$ -	\$ -	\$ -	\$ 15,600	\$ 15,600	\$ 10,000	\$ 5,600
Other	\$ 7,700	\$ 811	\$ 21	\$ 343	\$ 7,459	\$ 8,634	\$ 7,700	\$ 934
Total Revenues	\$ 1,924,570	\$ 480,230	\$ 473,703	\$ 470,639	\$ 531,165	\$ 1,955,737	\$ 1,924,570	\$ 31,167
Expenses:								
Executive Offices	\$ 460,214	\$ 116,759	\$ 114,485	\$ 111,066	\$ 115,461	\$ 457,771	\$ 460,214	\$ (2,443)
Administration	\$ 424,827	\$ 106,372	\$ 83,591	\$ 88,605	\$ 111,793	\$ 390,361	\$ 424,827	\$ (34,466)
Metropolitan Expenses	\$ 55,100	\$ 7,888	\$ 10,145	\$ 12,800	\$ 19,187	\$ 50,020	\$ 55,100	\$ (5,080)
Holy Synod	\$ 74,750	\$ 19,235	\$ 16,859	\$ 14,195	\$ 21,654	\$ 71,943	\$ 74,750	\$ (2,807)
Metropolitan Council	\$ 29,500	\$ 12,615	\$ 477	\$ 5,381	\$ 11,015	\$ 29,488	\$ 29,500	\$ (12)
Property Support	\$ 230,902	\$ 60,892	\$ 58,903	\$ 60,073	\$ 59,198	\$ 239,066	\$ 230,902	\$ 8,164
Communications/TOC	\$ 106,956	\$ 27,068	\$ 16,857	\$ 17,485	\$ 26,273	\$ 87,683	\$ 106,956	\$ (19,273)
External Affairs/ St Catherine's	\$ 132,282	\$ 33,970	\$ 31,938	\$ 25,405	\$ 26,476	\$ 117,789	\$ 132,282	\$ (14,493)
Archives	\$ 111,958	\$ 27,990	\$ 27,581	\$ 26,922	\$ 34,782	\$ 117,275	\$ 111,958	\$ 5,317
St Sergius Chapel	\$ 12,000	\$ 585	\$ 5,769	\$ 3,624	\$ 5,477	\$ 15,455	\$ 12,000	\$ 3,455
Ordination Candidate Testing	\$ 25,000	\$ 8,219	\$ 6,939	\$ 1,658	\$ 12,369	\$ 29,185	\$ 25,000	\$ 4,185
Office of Policy on Sexual Misconduct	\$ 88,836	\$ 23,519	\$ 15,920	\$ 30,664	\$ 14,796	\$ 84,899	\$ 88,836	\$ (3,937)
Board of Theological Education	\$ 2,000	\$ -	\$ -	\$ -	\$ 508	\$ 508	\$ 2,000	\$ (1,492)
PCC Expenses	\$ (11,869)	\$ -	\$ -	\$ -	\$ 24,255	\$ 24,255	\$ (11,869)	\$ 36,124
Church Planting Grants	\$ 102,000	\$ 26,001	\$ 30,333	\$ 25,500	\$ 25,500	\$ 107,334	\$ 102,000	\$ 5,334
Seminary Support	\$ 39,000	\$ -	\$ -	\$ -	\$ 39,000	\$ 39,000	\$ 39,000	\$ -
Strategic Planning-Continuing Education	\$ 10,000	\$ -	\$ -	\$ -	\$ 12,900	\$ 12,900	\$ 10,000	\$ 2,900
Total Operating Expenses	\$ 1,893,456	\$ 471,113	\$ 419,797	\$ 423,378	\$ 560,644	\$ 1,874,932	\$ 1,893,456	\$ (18,524)
Net Operating Surplus(Deficit)	\$ 31,114	\$ 9,117	\$ 53,906	\$ 47,261	\$ (29,479)	\$ 80,805	\$ 31,114	\$ 49,691
"Stewards of the Orthodox Church" and Departmental Ministries:								
Revenue (Appeals & DVP Program)	\$ 60,036	\$ 17,022	\$ 6,122	\$ 14,881	\$ 21,603	\$ 59,628	\$ 60,036	\$ (408)
Expenses:								
Administrative Expenses	\$ 2,100	\$ 1,048	\$ 350	\$ 977	\$ 413	\$ 2,788	\$ 2,100	\$ 688
Institutional Chaplaincy	\$ 7,350	\$ 1,581	\$ 1,581	\$ 1,841	\$ 2,400	\$ 7,403	\$ 7,350	\$ 53
Evangelization	\$ 8,750	\$ 2,085	\$ 2,085	\$ 2,707	\$ 8,545	\$ 15,422	\$ 8,750	\$ 6,672
Liturgical Music	\$ 11,125	\$ 3,210	\$ 3,210	\$ 2,514	\$ 3,368	\$ 12,302	\$ 11,125	\$ 1,177
Pastoral Life	\$ 10,000	\$ 8,924	\$ 8,923	\$ -	\$ 3,000	\$ 20,847	\$ 10,000	\$ 10,847
Christian Education	\$ 14,800	\$ 1,644	\$ 1,644	\$ 9,755	\$ 1,788	\$ 14,831	\$ 14,800	\$ 31
Youth and Young Adults	\$ 24,825	\$ 9,243	\$ 9,544	\$ 7,758	\$ 11,527	\$ 38,072	\$ 24,825	\$ 13,247
Diaconal Vocations	\$ 13,625	\$ 3,121	\$ 3,121	\$ 3,225	\$ 3,821	\$ 13,288	\$ 13,625	\$ (337)
Christian Service/Humanitarian Aid	\$ 8,575	\$ 1,783	\$ 1,783	\$ 2,341	\$ 1,500	\$ 7,407	\$ 8,575	\$ (1,168)
Total Expenses	\$ 101,150	\$ 32,639	\$ 32,241	\$ 31,118	\$ 36,362	\$ 132,360	\$ 101,150	\$ 31,210
Net SOCA/Departmental Costs	\$ (41,114)	\$ (15,617)	\$ (26,119)	\$ (16,237)	\$ (14,759)	\$ (72,732)	\$ (41,114)	\$ (31,618)
Net Operating Income	\$ (10,000)	\$ (6,500)	\$ 27,787	\$ 31,024	\$ (44,238)	\$ 8,073	\$ (10,000)	\$ 18,073
Net Operating Income (GAAP Basis)	\$ (10,000)	\$ (6,500)	\$ 27,787	\$ 31,024	\$ (44,238)	\$ 8,073	\$ (10,000)	\$ 18,073
Temporarily Restricted:								
Revenues	\$ 400,500	\$ 155,726	\$ 193,731	\$ 25,982	\$ (10,220)	\$ 365,219	\$ 400,500	\$ (35,281)
Expenses	\$ (391,630)	\$ (31,141)	\$ (39,946)	\$ (293,962)	\$ 5,921	\$ (359,128)	\$ (391,630)	\$ 32,502
Net Surplus/(Deficit)	\$ 8,870	\$ 124,585	\$ 153,785	\$ (267,980)	\$ (4,299)	\$ 6,091	\$ 8,870	\$ (2,779)
Permanently Restricted:								
Revenues	\$ 10,000	\$ 16,760	\$ 16,392	\$ (129,046)	\$ 41,570	\$ (54,324)	\$ 10,000	\$ (64,324)
Expenses	\$ (5,475)	\$ (12,675)	\$ (11,760)	\$ (2,691)	\$ (12,646)	\$ (39,772)	\$ (5,475)	\$ (34,297)
Net Surplus/(Deficit)	\$ 4,525	\$ 4,085	\$ 4,632	\$ (131,737)	\$ 28,924	\$ (94,096)	\$ 4,525	\$ (98,621)
Total Change in Net Assets	\$ 3,395	\$ 122,170	\$ 186,204	\$ (368,693)	\$ (19,613)	\$ (79,932)	\$ 3,395	\$ (83,327)

**Orthodox Church in America
Statement of Activities vs Budget
For the Year Ended 12/31/15**

EXHIBIT B-2

	FINAL Budget 2015	Actual Q1 2015	Actual Q2 2015	Actual Q3 2015	Actual Q-4 2015	Actual Thru 12/31/2015	Variance to Budget	2014 Actual	2015 vs 2014
Unrestricted Funds:									
REVENUES									
Diocesan Assessments	\$ 1,892,870	\$ 475,523	\$ 467,165	\$ 467,166	\$ 501,287	\$ 1,911,141	\$ 18,271	\$ 1,943,943	\$ (32,802)
Contributions	\$ 2,000	\$ 1,714	\$ 2,826	\$ 1,804	\$ 3,019	\$ 9,363	\$ 7,363	\$ 55,612	\$ (46,249)
St. Sergius Chapel	\$ 12,000	\$ 2,182	\$ 3,691	\$ 1,326	\$ 3,800	\$ 10,999	\$ (1,001)	\$ 13,256	\$ (2,257)
Investment Income	\$ 4,000	\$ 506	\$ 3	\$ 141	\$ -	\$ 650	\$ (3,350)	\$ 616	\$ 34
Enthronement Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Continuing Education Revenues	\$ 10,000	\$ -	\$ -	\$ -	\$ 15,600	\$ 15,600	\$ 5,600	\$ 19,950	\$ (4,350)
Other (Yearbook/Desk Calendar/OCPC Royalty)	\$ 3,700	\$ 305	\$ 18	\$ 202	\$ 7,459	\$ 7,984	\$ 4,284	\$ 2,357	\$ 5,627
TOTAL REVENUES	\$ 1,924,570	\$ 480,230	\$ 473,703	\$ 470,639	\$ 531,165	\$ 1,955,737	\$ 31,167	\$ 2,035,734	\$ (79,997)
EXPENSES									
Executive Offices									
Salaries	\$ 304,993	\$ 76,470	\$ 76,248	\$ 76,248	\$ 76,248	\$ 305,214	\$ 221	\$ 304,992	\$ 222
Clergy Housing	\$ 41,215	\$ 10,304	\$ 10,304	\$ 10,304	\$ 10,304	\$ 41,216	\$ 1	\$ 41,216	\$ -
Payroll Taxes	\$ 3,912	\$ 978	\$ 978	\$ 978	\$ 978	\$ 3,912	\$ -	\$ 3,912	\$ -
Benefits(Medical, Unemployment, Pension)	\$ 110,094	\$ 29,007	\$ 26,955	\$ 23,536	\$ 27,931	\$ 107,429	\$ (2,665)	\$ 107,694	\$ (265)
	\$ 460,214	\$ 116,759	\$ 114,485	\$ 111,066	\$ 115,461	\$ 457,771	\$ (2,443)	\$ 457,814	\$ (43)
Administrative Offices									
Salaries	\$ 110,500	\$ 27,854	\$ 27,797	\$ 27,853	\$ 30,978	\$ 114,482	\$ 3,982	\$ 105,519	\$ 8,963
Payroll Taxes	\$ 7,535	\$ 1,901	\$ 1,897	\$ 1,902	\$ 2,140	\$ 7,840	\$ 305	\$ 7,734	\$ 106
Benefits(Medical, Unemployment, Pension)	\$ 31,809	\$ 5,712	\$ 9,052	\$ 8,420	\$ 8,102	\$ 31,286	\$ (523)	\$ 47,692	\$ (16,406)
Legal	\$ 50,500	\$ 2,924	\$ 1,100	\$ 5,186	\$ 16,675	\$ 25,885	\$ (24,615)	\$ 24,310	\$ 1,575
Outside contractors	\$ 35,900	\$ 5,138	\$ 4,926	\$ 10,377	\$ 9,284	\$ 29,725	\$ (6,175)	\$ 14,633	\$ 15,092
Mortgage interest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounting/Audit	\$ 35,000	\$ 20,800	\$ 10,400	\$ -	\$ 2,800	\$ 34,000	\$ (1,000)	\$ 34,000	\$ -
Travel & meetings - central admin	\$ 20,840	\$ 9,806	\$ 7,177	\$ 6,918	\$ 11,310	\$ 35,211	\$ 14,371	\$ 29,814	\$ 5,397
Telephone	\$ 15,300	\$ 4,426	\$ 4,548	\$ 3,407	\$ 3,236	\$ 15,617	\$ 317	\$ 15,888	\$ (271)
Equipment leasing	\$ 22,392	\$ 8,944	\$ 2,044	\$ 8,242	\$ 5,116	\$ 24,346	\$ 1,954	\$ 19,125	\$ 5,221
Postage, mailing services	\$ 28,000	\$ 3,041	\$ (298)	\$ 3,378	\$ 3,498	\$ 9,619	\$ (18,381)	\$ 14,558	\$ (4,939)
Computer expense	\$ 6,000	\$ 495	\$ 2,479	\$ 1,800	\$ 4,473	\$ 9,247	\$ 3,247	\$ 10,154	\$ (907)
Stipends	\$ 35,400	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 24,000	\$ (11,400)	\$ 30,432	\$ (6,432)
Office Supplies	\$ 5,000	\$ 611	\$ 3,241	\$ 1,183	\$ 1,710	\$ 6,745	\$ 1,745	\$ 4,275	\$ 2,470
Food	\$ 4,900	\$ 1,350	\$ 1,209	\$ 2,069	\$ 2,351	\$ 6,979	\$ 2,079	\$ 5,347	\$ 1,632
Other administrative expenses(inc Auto)	\$ 5,500	\$ 2,040	\$ 1,493	\$ (1,227)	\$ 1,961	\$ 4,267	\$ (1,233)	\$ 13,601	\$ (9,334)
Bad Debt Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,000	\$ (22,000)
Insurance - D&O	\$ 3,541	\$ 3,465	\$ (1,607)	\$ -	\$ -	\$ 1,858	\$ (1,683)	\$ 3,541	\$ (1,683)
Payroll processing fees	\$ 3,200	\$ 863	\$ 759	\$ 712	\$ 810	\$ 3,144	\$ (56)	\$ 2,544	\$ 600
Bank fees, registration fees	\$ 2,210	\$ 1,002	\$ 1,374	\$ 695	\$ 669	\$ 3,740	\$ 1,530	\$ 1,725	\$ 2,015
Books, subscriptions, dues & other	\$ 1,300	\$ -	\$ -	\$ 1,690	\$ 680	\$ 2,370	\$ 1,070	\$ 2,268	\$ 102
Total Administrative Offices	\$ 424,827	\$ 106,372	\$ 83,591	\$ 88,605	\$ 111,793	\$ 390,361	\$ (34,466)	\$ 409,160	\$ (18,799)
Metropolitan Expenses									
Metropolitan Travel	\$ 37,350	\$ 4,859	\$ 8,185	\$ 11,238	\$ 14,969	\$ 39,251	\$ 1,901	\$ 46,405	\$ (7,154)
Office expense	\$ 5,750	\$ 1,559	\$ 310	\$ (63)	\$ 1,883	\$ 3,689	\$ (2,061)	\$ 4,630	\$ (941)
Office of Military Chaplaincy - Stipends	\$ 6,000	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 6,000	\$ -	\$ 6,000	\$ -
Office of Military Chaplaincy - Expenses	\$ 6,000	\$ (30)	\$ 150	\$ 125	\$ 835	\$ 1,080	\$ (4,920)	\$ 1,810	\$ (730)
Total Metropolitan Expenses	\$ 55,100	\$ 7,888	\$ 10,145	\$ 12,800	\$ 19,187	\$ 50,020	\$ (5,080)	\$ 58,845	\$ (8,825)
Holy Synod									
Travel	\$ 45,900	\$ 10,897	\$ 10,253	\$ 10,595	\$ 16,765	\$ 48,510	\$ 2,610	\$ 66,504	\$ (17,994)
Office expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Special Episcopal Stipends	\$ 14,400	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600	\$ 14,400	\$ -	\$ 14,400	\$ -
Food	\$ 1,250	\$ 914	\$ -	\$ -	\$ -	\$ 914	\$ (336)	\$ 653	\$ 261
Legal/Outside contractors	\$ 1,200	\$ -	\$ -	\$ -	\$ 1,180	\$ 1,180	\$ (20)	\$ -	\$ 1,180
Office supplies, Postage	\$ -	\$ 824	\$ -	\$ -	\$ 109	\$ 933	\$ 933	\$ 573	\$ 360
Episcopal Salary/Benefits	\$ 12,000	\$ 3,000	\$ 3,000	\$ -	\$ -	\$ 6,000	\$ (6,000)	\$ 12,000	\$ (6,000)
Other	\$ -	\$ -	\$ 6	\$ -	\$ -	\$ 6	\$ 6	\$ -	\$ 6
Total Holy Synod	\$ 74,750	\$ 19,235	\$ 16,859	\$ 14,195	\$ 21,654	\$ 71,943	\$ (2,807)	\$ 94,130	\$ (22,187)
Metropolitan Council									
Travel and Meetings - MC	\$ 28,000	\$ 12,615	\$ -	\$ 5,381	\$ 10,896	\$ 28,892	\$ 892	\$ 31,907	\$ (3,015)
Internal Audit - Travel, Lodging and Meals, Supp	\$ 1,500	\$ -	\$ 477	\$ -	\$ 119	\$ 596	\$ (904)	\$ 374	\$ 222
	\$ 29,500	\$ 12,615	\$ 477	\$ 5,381	\$ 11,015	\$ 29,488	\$ (12)	\$ 32,281	\$ (2,793)
Property Support									
Salaries	\$ 46,350	\$ 11,588	\$ 11,588	\$ 11,587	\$ 11,588	\$ 46,351	\$ 1	\$ 46,350	\$ 1
Payroll Taxes	\$ 3,546	\$ 886	\$ 886	\$ 887	\$ 886	\$ 3,545	\$ (1)	\$ 3,546	\$ (1)
Lawn/Grounds Upkeep	\$ 30,000	\$ 7,200	\$ 12,450	\$ 12,765	\$ 7,690	\$ 40,105	\$ 10,105	\$ 41,645	\$ (1,540)
Benefits(Medical, Unemployment, Pension)	\$ 13,106	\$ 2,700	\$ 3,273	\$ 3,347	\$ 2,934	\$ 12,254	\$ (852)	\$ 13,283	\$ (1,009)
Insurance	\$ 32,000	\$ 8,914	\$ 8,700	\$ 8,700	\$ 8,700	\$ 35,014	\$ 3,014	\$ 36,625	\$ (1,611)
Depreciation	\$ 20,000	\$ 7,051	\$ 7,051	\$ 7,051	\$ 6,295	\$ 27,448	\$ 7,448	\$ 32,520	\$ (5,072)
Town Services Fee	\$ 30,000	\$ 7,500	\$ 7,500	\$ 7,500	\$ 11,517	\$ 34,017	\$ 4,017	\$ 32,995	\$ 1,022
Auto expense	\$ 6,000	\$ 2,101	\$ 3,548	\$ 1,025	\$ 1,025	\$ 7,699	\$ 1,699	\$ 4,513	\$ 3,186
Electricity	\$ 14,000	\$ 4,151	\$ 2,221	\$ 3,866	\$ 2,906	\$ 13,144	\$ (856)	\$ 13,697	\$ (553)
Heating oil	\$ 25,000	\$ 8,745	\$ 1,793	\$ 1,238	\$ 1,538	\$ 13,314	\$ (11,686)	\$ 23,379	\$ (10,065)
Equipment Repairs and Rental	\$ 5,000	\$ -	\$ -	\$ 414	\$ 2,022	\$ 2,436	\$ (2,564)	\$ 1,349	\$ 1,087
Garbage removal	\$ 3,000	\$ 480	\$ 480	\$ 480	\$ 480	\$ 1,920	\$ (1,080)	\$ 2,618	\$ (698)
General repairs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,858	\$ (7,858)
Janitorial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 440	\$ (440)
Outside contractors	\$ 100	\$ -	\$ -	\$ 103	\$ -	\$ 103	\$ 3	\$ 79	\$ 24
Gas & Water	\$ 300	\$ -	\$ 81	\$ 18	\$ 99	\$ 198	\$ (102)	\$ 231	\$ (33)
Travel	\$ -	\$ -	\$ -	\$ -	\$ 152	\$ 152	\$ 152	\$ 209	\$ (57)
Supplies	\$ 2,500	\$ (424)	\$ (668)	\$ 1,092	\$ 1,366	\$ 1,366	\$ (1,134)	\$ 2,661	\$ (1,295)
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Property Support	\$ 230,902	\$ 60,892	\$ 58,903	\$ 60,073	\$ 59,198	\$ 239,066	\$ 8,164	\$ 263,978	\$ (24,912)

	FINAL Budget 2015	Actual Q1 2015	Actual Q2 2015	Actual Q3 2015	Actual Q-4 2015	Actual Thru 12/31/2015	Variance to Budget	2014 Actual	2015 vs 2014
Department of Communications and Ministries									
Printing, copying and postage "TOC"	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (15,000)	\$ -	\$ -
The Orthodox Church - Salaries	\$ 53,825	\$ 17,939	\$ 8,971	\$ 13,456	\$ 13,456	\$ 53,822	\$ (3)	\$ 53,825	\$ (3)
Contract web master	\$ 30,000	\$ 8,070	\$ 7,185	\$ 3,375	\$ 11,363	\$ 29,993	\$ (7)	\$ 36,470	\$ (6,477)
Website hosting and maintenance	\$ 3,800	\$ 640	\$ 701	\$ 654	\$ 1,018	\$ 3,013	\$ (787)	\$ 4,871	\$ (1,858)
Benefits(Medical, Unemployment, Pension)-TOC	\$ 4,331	\$ 419	\$ -	\$ -	\$ -	\$ 419	\$ (3,912)	\$ 4,314	\$ (3,895)
Internet/Telephone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel & Parking	\$ -	\$ -	\$ -	\$ -	\$ 436	\$ 436	\$ 436	\$ -	\$ 436
Office supplies & postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Equipment rental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Department of Communications and Minis	\$ 106,956	\$ 27,068	\$ 16,857	\$ 17,485	\$ 26,273	\$ 87,683	\$ (19,273)	\$ 99,480	\$ (11,797)
Department of External Affairs									
Salaries - External Affairs	\$ 35,293	\$ 8,823	\$ 8,823	\$ 8,824	\$ 8,823	\$ 35,293	\$ 0	\$ 35,293	\$ -
St. Catherines - Stipends	\$ 51,142	\$ 12,805	\$ 12,786	\$ 12,786	\$ 12,786	\$ 51,163	\$ 21	\$ 51,327	\$ (164)
Interchurch travel	\$ 21,500	\$ 3,746	\$ 6,734	\$ 807	\$ 607	\$ 11,894	\$ (9,606)	\$ 19,092	\$ (7,198)
St. Catherines - Benefits(Medical, Unempl, Pen)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Telephone & office expense	\$ 13,800	\$ 2,278	\$ 1,905	\$ 2,317	\$ 2,136	\$ 8,636	\$ (5,164)	\$ 14,395	\$ (5,759)
Benefits - External Affairs(Medical, Unempl, Per	\$ 3,047	\$ 1,318	\$ 670	\$ 671	\$ 674	\$ 3,333	\$ 286	\$ 2,317	\$ 1,016
Bank Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other interchurch organizations	\$ 7,500	\$ 5,000	\$ 1,020	\$ -	\$ 1,450	\$ 7,470	\$ (30)	\$ 8,510	\$ (1,040)
Total Department of External Affairs	\$ 132,282	\$ 33,970	\$ 31,938	\$ 25,405	\$ 26,476	\$ 117,789	\$ (14,493)	\$ 130,934	\$ (13,145)
Department of History and Archives									
Salaries	\$ 63,548	\$ 15,887	\$ 15,887	\$ 15,887	\$ 15,887	\$ 63,548	\$ (0)	\$ 63,548	\$ -
Payroll Taxes	\$ 4,861	\$ 1,215	\$ 1,215	\$ 1,216	\$ 1,215	\$ 4,861	\$ (0)	\$ 4,861	\$ -
Benefits(Medical, Unemployment, Pension)	\$ 32,498	\$ 8,191	\$ 8,516	\$ 8,745	\$ 7,104	\$ 32,556	\$ 58	\$ 32,575	\$ (19)
Supplies/Travel/Consultants	\$ 11,050	\$ 2,697	\$ 1,963	\$ 1,074	\$ 10,576	\$ 16,310	\$ 5,260	\$ 841	\$ 15,469
Total Department of History and Archives	\$ 111,958	\$ 27,990	\$ 27,581	\$ 26,922	\$ 34,782	\$ 117,275	\$ 5,317	\$ 101,825	\$ 15,450
PCC Expenses Reimbursement									
Theological Education	\$ 2,000	\$ -	\$ -	\$ -	\$ 508	\$ 508	\$ (1,492)	\$ -	\$ 508
St Sergius Chapel	\$ 12,000	\$ 585	\$ 5,769	\$ 3,624	\$ 5,477	\$ 15,455	\$ 3,455	\$ 15,739	\$ (284)
Ordination Candidate Psychological Testing	\$ 25,000	\$ 8,219	\$ 6,939	\$ 1,658	\$ 12,369	\$ 29,185	\$ 4,185	\$ 21,593	\$ 7,592
Planting Grants	\$ 102,000	\$ 26,001	\$ 30,333	\$ 25,500	\$ 25,500	\$ 107,334	\$ 5,334	\$ 109,167	\$ (1,833)
Seminary Support	\$ 39,000	\$ -	\$ -	\$ -	\$ 39,000	\$ 39,000	\$ -	\$ -	\$ 39,000
Policies and Procedures Regarding Sexual Misc	\$ 88,836	\$ 23,519	\$ 15,920	\$ 30,664	\$ 14,796	\$ 84,899	\$ (3,937)	\$ 86,271	\$ (1,372)
Strategic Planning-Continuing Education	\$ 10,000	\$ -	\$ -	\$ -	\$ 12,900	\$ 12,900	\$ 2,900	\$ 18,450	\$ (5,550)
TOTAL OPERATING EXPENSES	\$ 1,893,456	\$ 471,113	\$ 419,797	\$ 423,378	\$ 580,644	\$ 1,874,932	\$ (18,524)	\$ 1,910,491	\$ (35,559)
NET OPERATING SURPLUS(DEFICIT)	\$ 31,114	\$ 9,117	\$ 53,906	\$ 47,261	\$ (29,479)	\$ 80,805	\$ 49,691	\$ 125,243	\$ (44,438)
Stewards Income & Expenses									
Stewards of the OCA Revenue	\$ 55,036	\$ 16,022	\$ 5,972	\$ 9,982	\$ 21,155	\$ 53,131	\$ (1,905)	\$ 34,883	\$ 18,248
Diaconal Vocations Revenue	\$ 3,500	\$ 1,000	\$ 150	\$ 4,900	\$ (3,552)	\$ 2,498	\$ (1,002)	\$ 3,750	\$ (1,252)
Program Fees-Lit Music	\$ 1,500	\$ -	\$ -	\$ -	\$ 4,000	\$ 4,000	\$ 2,500	\$ 2,625	\$ 1,375
Dividends & Interest(net of investment fees)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total SOCA Income	\$ 60,036	\$ 17,022	\$ 6,122	\$ 14,882	\$ 21,603	\$ 59,629	\$ (407)	\$ 41,258	\$ 18,371
Stewards of the OCA									
Ministries Conference	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SOCA Printing and Mailing Expense	\$ 2,100	\$ 1,048	\$ 350	\$ 977	\$ 413	\$ 2,788	\$ 688	\$ 4,445	\$ (1,657)
TOTAL SOCA Expense	\$ 2,100	\$ 1,048	\$ 350	\$ 977	\$ 413	\$ 2,788	\$ 688	\$ 1,048	\$ (1,657)
Net SOCA Income(Deficit)	\$ 57,936	\$ 15,974	\$ 5,772	\$ 13,905	\$ 21,190	\$ 56,841	\$ (1,095)	\$ 40,210	\$ 20,028
Departmental Expenses									
Department of Institutional Chaplaincy	\$ 7,350	\$ 1,581	\$ 1,581	\$ 1,841	\$ 2,400	\$ 7,403	\$ 53	\$ 6,844	\$ 559
Department of Evangelization	\$ 8,750	\$ 2,085	\$ 2,085	\$ 2,707	\$ 8,545	\$ 15,422	\$ 6,672	\$ 10,585	\$ 4,837
Department of Liturgical Music & Translations	\$ 11,125	\$ 3,210	\$ 3,210	\$ 2,514	\$ 3,368	\$ 12,302	\$ 1,177	\$ 12,927	\$ (625)
Department of Pastoral Life & Vocational Develop	\$ 10,000	\$ 8,924	\$ 8,923	\$ -	\$ 3,000	\$ 20,847	\$ 10,847	\$ -	\$ 20,847
Department of Christian Education	\$ 14,800	\$ 1,644	\$ 1,644	\$ 9,755	\$ 1,788	\$ 14,831	\$ 31	\$ 17,883	\$ (3,052)
Department of Youth and Young Adults	\$ 24,825	\$ 9,243	\$ 9,544	\$ 7,758	\$ 11,527	\$ 38,072	\$ 13,247	\$ 34,728	\$ 3,344
Diaconal Vocations Program	\$ 13,625	\$ 3,121	\$ 3,121	\$ 3,225	\$ 3,821	\$ 13,288	\$ (337)	\$ 12,236	\$ 1,052
Department of Christian Service	\$ 8,575	\$ 1,783	\$ 1,783	\$ 2,341	\$ 1,500	\$ 7,407	\$ (1,168)	\$ 11,258	\$ (3,851)
Total Departmental Expenses	\$ 99,050	\$ 31,591	\$ 31,891	\$ 30,141	\$ 35,949	\$ 129,572	\$ 30,522	\$ 106,461	\$ 23,111
HONESDALE LOAN PRINCIPAL PAYMENTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Net Income(Deficit)	\$ (10,000)	\$ (6,500)	\$ 27,787	\$ 31,025	\$ (44,238)	\$ 8,074	\$ 18,074	\$ 58,992	\$ (47,521)
Extraordinary Items:									
- Enthronement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Net Income(Deficit)	\$ (10,000)	\$ (6,500)	\$ 27,787	\$ 31,025	\$ (44,238)	\$ 8,074	\$ 18,074	\$ 58,992	\$ (47,521)
Unrestricted Funds:									
Net Operating Surplus/(Deficit)	\$ (10,000)	\$ (6,500)	\$ 27,787	\$ 31,025	\$ (44,238)	\$ 8,074	\$ 18,074	\$ 58,992	\$ (47,521)
Add Back Non-Cash Items (Depreciation & Amort)	\$ -	\$ 7,051	\$ 7,051	\$ 7,051	\$ 6,295	\$ 27,448	\$ 27,448	\$ 32,520	\$ (27,072)
Add Back Transfers (Not P&L Items)	\$ -	\$ -	\$ -	\$ -	\$ 39,000	\$ 39,000	\$ 39,000	\$ -	\$ -
Add Back Mortgage Principal Payment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Operating Surplus/(Deficit) - Unrestricted	\$ (10,000)	\$ 551	\$ 34,838	\$ 38,076	\$ 1,057	\$ 74,522	\$ 84,522	\$ 91,512	\$ (74,599)
Temporarily Restricted Funds:									
Revenues:									
- Charity	\$ 5,000	\$ 1,067	\$ -	\$ 25	\$ (10)	\$ 1,082	\$ (3,918)	\$ 1,316	\$ (234)
- Missions & Church Planting Grants	\$ 5,000	\$ 399	\$ 225	\$ 1,162	\$ (178)	\$ 1,608	\$ (3,392)	\$ 3,599	\$ (1,991)
- Youth Ministry Bequest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,500	\$ (2,500)
- Seminary	\$ 5,000	\$ 432	\$ 25	\$ 1,760	\$ 15,523	\$ 17,740	\$ 12,740	\$ 10,363	\$ 7,377

	FINAL Budget 2015	Actual Q1 2015	Actual Q2 2015	Actual Q3 2015	Actual Q-4 2015	Actual Thru 12/31/2015	Variance to Budget	2014 Actual	2015 vs 2014
- North America Saints Project	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Kavalenko Trust	\$ 2,500	\$ 890	\$ 689	\$ (2,342)	\$ (69)	\$ (1,032)	\$ (3,532)	\$ 7,849	\$ (8,881)
- McGuire Trust	\$ 2,500	\$ 100	\$ 100	\$ 322	\$ (175)	\$ 347	\$ (2,153)	\$ 1,241	\$ (894)
- Rotko Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- York Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 49,172	\$ (49,172)
- All American Council	\$ 380,500	\$ 148,038	\$ 192,692	\$ 24,855	\$ (25,251)	\$ 340,334	\$ (40,166)	\$ 50	\$ 340,284
- Other Bequests	\$ -	\$ 5,000	\$ -	\$ 200	\$ (60)	\$ 5,140	\$ 5,140	\$ 3,000	\$ 2,140
Total Temporarily Restricted Revenues	\$ 400,500	\$ 155,726	\$ 193,731	\$ 25,982	\$ (10,220)	\$ 365,219	\$ (35,281)	\$ 79,090	\$ 286,129
Expenses:									
- Charity	\$ 5,000	\$ -	\$ -	\$ -	\$ 2,823	\$ 2,823	\$ (2,177)	\$ 6,896	\$ (4,073)
- Missions	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (5,000)	\$ -	\$ -
- Church Planting Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Seminary	\$ 5,000	\$ -	\$ -	\$ -	\$ 12,506	\$ 12,506	\$ 7,506	\$ 9,780	\$ 2,726
- Publications	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Kavalenko Trust	\$ 4,000	\$ 634	\$ 634	\$ 932	\$ 940	\$ 3,140	\$ (860)	\$ 5,041	\$ (1,901)
- McGuire Trust	\$ 4,000	\$ 325	\$ -	\$ -	\$ -	\$ 325	\$ (3,675)	\$ 707	\$ (382)
- Rotko Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- York Trust	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 325	\$ (325)
- All American Council (including PCC)	\$ 368,630	\$ 30,182	\$ 39,312	\$ 293,030	\$ 2,065	\$ 364,589	\$ (4,041)	\$ 28,847	\$ 335,742
- Other (Release from Restrictions) (AAC)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (24,255)	\$ (24,255)	\$ 760	\$ (25,015)
Total Temporarily Restricted Disbursements	\$ 391,630	\$ 31,141	\$ 39,946	\$ 293,962	\$ 18,334	\$ 359,128	\$ (32,502)	\$ 52,356	\$ 306,772
Net Temporarily Restricted Surplus/(Deficit)	\$ 8,870	\$ 124,585	\$ 153,785	\$ (267,980)	\$ (28,554)	\$ 6,091	\$ (2,778)	\$ 26,734	\$ (20,643)
Permanently Restricted Funds:									
Revenue:									
- St Andrew's Endowment	\$ 2,500	\$ 219	\$ 218	\$ (9,431)	\$ 2,495	\$ (6,499)	\$ (8,999)	\$ 980	\$ (7,479)
- Mission Endowment	\$ -	\$ 8,770	\$ 8,770	\$ (74,560)	\$ 20,406	\$ (36,614)	\$ (36,614)	\$ -	\$ (36,614)
- Main Endowment	\$ 5,000	\$ 7,125	\$ 6,758	\$ (38,644)	\$ 17,034	\$ (7,727)	\$ (12,727)	\$ 10,522	\$ (18,249)
- FOS Endowment	\$ 2,500	\$ 646	\$ 646	\$ (6,411)	\$ 1,635	\$ (3,484)	\$ (6,984)	\$ 936	\$ (4,420)
Total Revenues	\$ 10,000	\$ 16,760	\$ 16,392	\$ (129,046)	\$ 41,570	\$ (54,324)	\$ (64,324)	\$ 12,438	\$ (66,762)
Funds Released:									
- St Andrew's Endowment	\$ 900	\$ 684	\$ 684	\$ 128	\$ 1,613	\$ 3,109	\$ 2,209	\$ 1,386	\$ 1,723
- Mission Endowment	\$ -	\$ 9,203	\$ 8,687	\$ 966	\$ 5,251	\$ 24,107	\$ 24,107	\$ -	\$ 24,107
- Main Endowment	\$ 3,675	\$ 2,283	\$ 1,884	\$ 1,511	\$ 4,740	\$ 10,418	\$ 6,743	\$ 7,048	\$ 3,370
- FOS Endowment	\$ 900	\$ 505	\$ 505	\$ 86	\$ 1,042	\$ 2,138	\$ 1,238	\$ 555	\$ 1,583
Total Funds Released	\$ 5,475	\$ 12,675	\$ 11,760	\$ 2,691	\$ 12,646	\$ 39,772	\$ 34,297	\$ 8,989	\$ 30,783
Net Permanently Restricted Surplus/(Deficit)	\$ 4,525	\$ 4,085	\$ 4,632	\$ (131,737)	\$ 28,924	\$ (94,096)	\$ (98,621)	\$ 3,449	\$ (97,545)
Total Change in Net Assets	\$ 3,395	\$ 122,170	\$ 186,204	\$ (366,692)	\$ (4,868)	\$ (79,931)	\$ (83,326)	\$ 89,175	\$ (169,106)

	Projected			Actuals as of December 31, 2015				Variance	
	PCC 2014/15(1)	AAC 2015	Youth Program	Total 2015	PCC 2014/15	AAC 2015	Youth Program		Total 2015
Revenues:									
Total Special Assessment	\$ -	\$ 261,000.00	\$ -	\$ 261,000.00	\$ -	\$ 256,849.96	\$ -	\$ 256,849.96	\$ (4,150.04)
Donations/Travel Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,911.21	\$ -	\$ 4,911.21	\$ 4,911.21
Appeals/Youth Endowment	\$ -	\$ -	\$ 15,000.00	\$ 15,000.00	\$ -	\$ -	\$ 15,000.00	\$ 15,000.00	\$ -
Total Observer Fees	\$ -	\$ 37,500.00	\$ -	\$ 37,500.00	\$ -	\$ 22,250.00	\$ -	\$ 22,250.00	\$ (15,250.00)
FOCA AD Book	\$ -	\$ 20,000.00	\$ -	\$ 20,000.00	\$ -	\$ 12,680.00	\$ -	\$ 12,680.00	\$ (7,320.00)
Youth Program Fees	\$ -	\$ -	\$ 20,000.00	\$ 20,000.00	\$ -	\$ -	\$ 11,700.00	\$ 11,700.00	\$ (8,300.00)
Vendor/Exhibitor Fees/Banquet	\$ -	\$ 27,000.00	\$ -	\$ 27,000.00	\$ -	\$ 30,325.00	\$ -	\$ 30,325.00	\$ 3,325.00
Total Revenues	\$ -	\$ 345,500.00	\$ 35,000.00	\$ 380,500.00	\$ -	\$ 327,016.17	\$ 26,700.00	\$ 353,716.17	\$ (26,783.83)
Expenses:									
Bank Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 399.00	\$ -	\$ 399.00	\$ (399.00)
Food - PCC	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Flowers/Candles/Lit Items	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,655.00	\$ -	\$ 5,655.00	\$ (5,655.00) (1)
Advertising	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,062.57	\$ -	\$ 4,062.57	\$ (4,062.57) (2)
Outside Contract Services	\$ -	\$ 60,000.00	\$ 2,500.00	\$ 62,500.00	\$ -	\$ 85,610.82	\$ 415.00	\$ 86,025.82	\$ (23,525.82) (3)
Postage and Mailing	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Printing/Copying	\$ -	\$ 4,500.00	\$ -	\$ 4,500.00	\$ 28.11	\$ 5,566.52	\$ -	\$ 5,594.63	\$ (1,094.63)
Supplies	\$ -	\$ 12,000.00	\$ 900.00	\$ 12,900.00	\$ 1,771.35	\$ 20,909.42	\$ 2,450.00	\$ 25,130.77	\$ (12,230.77) (4)
Equipment Rental	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,355.33	\$ -	\$ 12,355.33	\$ (12,355.33) (5)
Conference, meetings	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Travel	\$ 25,236.00	\$ 50,000.00	\$ -	\$ 75,236.00	\$ 20,332.96	\$ 54,888.80	\$ -	\$ 75,221.76	\$ 14.24
Lodging	\$ 3,816.00	\$ 25,000.00	\$ 11,160.00	\$ 39,976.00	\$ 4,384.77	\$ 47,254.46	\$ -	\$ 51,639.23	\$ (11,663.23) (7)
Meals	\$ 3,908.00	\$ 103,870.00	\$ 13,000.00	\$ 120,778.00	\$ 3,373.37	\$ 88,631.33	\$ 17,156.65	\$ 109,161.35	\$ 11,616.65
Stipends	\$ -	\$ 12,600.00	\$ -	\$ 12,600.00	\$ 9,780.00	\$ 5,396.00	\$ -	\$ 15,176.00	\$ (2,576.00)
Iconostas	\$ -	\$ 35,300.00	\$ -	\$ 35,300.00	\$ -	\$ -	\$ -	\$ -	\$ 35,300.00 (8)
Activities Expense	\$ -	\$ -	\$ 7,500.00	\$ 7,500.00	\$ -	\$ -	\$ 12,024.00	\$ 12,024.00	\$ (4,524.00) (6)
Other Admin Expense	\$ 2,040.00	\$ 3,100.00	\$ -	\$ 5,140.00	\$ -	\$ 196.75	\$ -	\$ 196.75	\$ 4,943.25
Total Expenses	\$ 35,000.00	\$ 306,370.00	\$ 35,060.00	\$ 376,430.00	\$ 39,670.56	\$ 330,926.00	\$ 32,045.65	\$ 402,642.21	\$ (26,212.21)
Net Surplus/(Deficit)	\$ (35,000.00)	\$ 39,130.00	\$ (60.00)	\$ 4,070.00	\$ (39,670.56)	\$ (3,909.83)	\$ (5,345.65)	\$ (48,926.04)	\$ (52,996.04)

\$ (9,255.48)	Total 2015
\$ (15,000.00)	Tfr-from Youth End
\$ (24,255.48)	Total 2015 Net Expense

- (1) Icons for Gifts - Fr Matusiak
- (2) PhatPixel Media - daily videos
- (3) Rolla Creative
 - \$ 1,200.00
 - Burning Bush \$ 11,267.00
 - Eagle Security \$ 760.00
 - Legal Editor - Michael Cuccaar \$ 4,500.00
 - Hilton AV \$ 61,645.00
 - Orthodox web Solutinos \$ 3,265.00
 - Single Source \$ 415.00
 - Parliamentarian \$ 2,540.00
 - \$ 85,592.00
- (5) PC Rental from Burning Bush \$ 3,000.00
 - Atlanta Business Machine \$ 2,739.25
 - Freeman-Exhibit décor \$ 6,616.08
 - \$ 12,355.33

- (4) American Express
 - Workshop Supplies \$ 1,667.00
 - various depts \$ 2,070.00
 - Hilton Inn \$ 413.00
 - James Condra-vendors \$ 700.00
 - Michaela - supplies and gifts for volunteers \$ 2,852.00
 - Orthodox Gifts(Youth) \$ 1,544.00
 - PC Nametag \$ 3,061.00
 - Peter Ilchuk-crates and curtain iconostasis \$ 2,469.00
 - Transamerica printing \$ 7,276.00
 - TSO General \$ 665.00
 - Tucci-Youth \$ 906.00
 - St Symeon Choir \$ 386.00
 - \$ 24,009.00
- (6) Six Flags and City Passes \$ 12,024.00

- (7) Orig budget considered more comped rooms for staff and dept heads
- (8) Iconostasis total cost was \$31,878; is being capitalized and depreciated.

ORTHODOX CHURCH IN AMERICA
 ALL DONATIONS 2015 AND 2015
 LISTED BY PURPOSE OF DONATION

Exhibit D

Purpose	-----2015-----		-----2014-----	
	# Donors	Amount	# Donations	Amount
Chapel Donations	11	\$ 7,157.00	12	\$ 9,402.00
Charity Appeal	8	\$ 1,367.33	13	\$ 1,666.00
Clergy Care Fund	1	\$ 200.00	1	\$ 3,000.00
Christian Service/Humanitarian Aid	1	\$ 120.00	-	\$ -
Earmarks	1	\$ 5,705.00	4	\$ 3,400.00
General Donations	9	\$ 3,474.00	10	\$ 3,074.00
Liturgical Music Donations	6	\$ 615.00	4	\$ 255.00
Mission Appeal	7	\$ 1,798.33	11	\$ 3,599.00
Seminary Appeal	10	\$ 17,740.35	6	\$ 10,362.69
Stewards of the OCA	99	\$ 53,911.00	60	\$ 35,126.40
Youth Grant	-	\$ -	1	\$ 2,500.00
Bequests	1	\$ 5,000.00	1	\$ 51,521.89
Totals	154	\$ 97,088.01	123	\$ 123,906.98