



**ORTHODOX
CHURCH in
AMERICA**

Metropolitan Council Meeting

Spring 2017

Officers' Reports



**Meeting of the Metropolitan Council
February 21 to February 23, 2017
Officers' Reports**

Table of Contents

1.	Metropolitan's Report	Metropolitan Tikhon
2.	Chancellor's Report	Archpriest John Jillions
	A. ORSMA Report (Executive Session)	Cindy Heise
	B. SMPAC Report	Dr. Albert Rossi
3.	Secretary's Report	Archpriest Eric G. Tosi
	A. Archives Report - Archives Refurbish	Alexis Liberovsky Archpriest Eric G. Tosi
	B. Information Technology Update	Ryan Platte
	C. Website Refurbish	Archpriest Eric G. Tosi
	D. Roof Proposal	Archpriest Eric G. Tosi
4.	Treasurer's Report	Melanie Ringa



THE TWELVE MONTHS OF THE FOUR PILLARS

Every month of the year will be devoted to one aspect of each of the four pillars. These are intentionally NOT appeals for any of the areas, although they could overlap with such appeals (SOCA, Seminaries, etc).

Each aspect may be further subdivided into weekly components. This could be an opportunity to expand the contributed articles on the website. We would solicit various authors (bishops, clergy, faithful, monastics, seminarians, etc.) for contribution to the topic of the month/week.

PROPOSED SEQUENCE

- I. April 2017: *IV. External Relations*: OCA History Month (Pascha)
- II. May 2017: *II. Stewardship*: OCA Departments / Charities
- III. June 2017: *I. Spiritual Life*: Seminaries (Old Seminary Appeal month)
- IV. July 2017: *III. Outreach and Evangelism*: Contemporary Moral and Ethical Issues
- V. August 2017: *III. Outreach and Evangelism*: Mission Planting Grants / Revitalization (Mission School)
- VI. September 2017: *II. Stewardship*: Sanctity of Life Issues; the environment (Sept. 1)
- VII. October 2017: *IV. External Relations*: Relations with our Orthodox Neighbors (ACOB Meeting)
- VIII. November 2017: *I. Spiritual Life*: Clergy Health
- IX. December 2017: *IV. External Relations*: Relations with our non-Orthodox Neighbors
- X. January 2018: *II. Stewardship*: The Patrimony of the Church (Chanc/Treasurers meeting)
- XI. February 2018: *I. Spiritual Life*: Monasteries / Pilgrimages (Prep. For Lent)
- XII. March 2018: *III. Outreach and Evangelism*: Communications (Lent)

February 21, 2017

**The Metropolitan Council
February 21-23, 2017**

Chancellor's Report

Chancellor's Areas of Focus

The normal day-to-day routine includes emails, phone calls, discussions and specific assignments from Metropolitan Tikhon. The Metropolitan's office is involved in preparing draft texts for His Beatitude, addressing complaints against (and from) bishops, crisis situations, requests for transfers, lifting of depositions, meetings with Metropolitan Tikhon, officers and others, calls with Cindy Heise and ORSMA consultants about ongoing cases, calls with diocesan bishops, chancellors and seminary administration, and meetings related to the OCA's external relations. There is also the life of St Sergius chapel which has a regular schedule of services for weekends and feastdays.

In addition, my work as chancellor has had a number of areas of particular focus since the last MC meeting.

Department of Pastoral Life

Bishop Paul is the episcopal moderator, I am the department chair and Fr Nathan Preston is the administrator. He normally comes to the Chancery on Mondays to oversee progress on a number of initiatives to advance the ministries, collegiality and health of clergy and their families. The executive committee meets monthly by teleconference (in addition to the above this includes Fr Stephen Evanina (NY-NY), Fr David Lowell (DOW), Fr Dennis Rhodes (Alb), Fr Gregory Safchuk (DC), Fr Nicholas Solak (EPA). Progress reports are sent regularly to diocesan representatives. The Department report has further details on all the initiatives below.

- Preparing an update of the OCA's *Guidelines for Clergy*, for consideration and approval by the Holy Synod of Bishops.
- Clergy peer-learning groups: began with financial support of EPA, 5 groups in place, 28 participants from 6 OCA dioceses and Greek, Antiochian and Serbian archdioceses; first group of clergy wives.
- "Discerning Celibacy:" interviews conducted with all bishops on serving the pastoral needs of celibate clergy; formation of new peer group.
- Sexual Identity: interviews conducted with all bishops on pastoral issues, including the difficulty of speaking about this among clergy
- Preparing an update of the OCA's *Clergy Compensation Guidelines* (see the attached report on Fr David Lowell's study of this issue in the DOW.)

Chancellor's Report to the Metropolitan Council

February 21, 2017

Social worker Cindy Heise is now a regular participant in the monthly meetings of the department executive committee. She has a particular interest in the health of clergy wives and families. (On a related note, I would like to highlight a somewhat neglected clergy wife: Matushka Anna Turkevich, the late wife of Metropolitan Leonty of blessed memory. See the attached obituary and poem that then Fr Leonid Turkevich wrote about her in 1925.)

Diocesan Chancellors and Treasurers Meeting

This was the sixth annual one-day meeting of the diocesan chancellors and treasurers at the Chancery (January 24, 2017), and it once again proved to be one of the most effective meetings on the OCA calendar. Treasurer Melanie Ringa led most of the agenda, which was devoted to sharing experience, practices and insights about implementing the new funding mechanism passed at the 2015 AAC. But we also reported on the clergy compensation study (DOW) and how other dioceses might adapt this for their own study. There is interest as well in bringing clergy peer groups to other dioceses, and Fr Nathan Preston and Fr Martin Browne (EPA chancellor) spoke about their experiences forming groups.

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.

Seminaries

Together with Metropolitan Tikhon, I serve on the boards of St Herman, St Tikhon's and St Vladimir's Seminaries. Major board tasks since the last MC meeting included the accreditation visit to St Tikhon's Seminary by a team from the Association of Theological Schools (ATS) and the governance restructuring at St Vladimir's Seminary. I was also invited to participate in a recent conference at Union Theological Seminary on "Faith and Ecology in Seminary Education" and will share the results of this with our seminaries, including the possibility of being certified as "Green Seminary." The Orthodox Church is recognized globally for its rich theology of creation (Patriarch Bartholomew is even known as "the green patriarch.") For more about Orthodox perspectives on the environment, see the website of the Fellowship of the Transfiguration, <http://www.orth-transfiguration.org>.

ORSMA (Office for Review of Sexual Misconduct Allegations)

Cindy Heise's report will give you a picture of ORSMA's current caseload and activities. The work of the Office is now divided between Cindy as Coordinator and Bernard Wilson as contracted consultant on investigations. In addition to investigating some very complex cases, ORSMA has focused most recently on working with the dioceses to implement a new centralized background-check system approved by the Holy Synod, "Protect My Ministry."

SMPAC (Sexual Misconduct Policy Advisory Committee):

Chancellor's Report to the Metropolitan Council

February 21, 2017

The SMPAC report will also be presented at the MC meeting. SMPAC continues to meet monthly via teleconference to review cases and consider policy and procedure questions. Most recently we have addressed centralizing background checks (“Protect My Ministry”), the “Clergyman in Crisis Protocol,” confidentiality (especially related to the sacrament of confession), diocesan compliance and addressing ways to shorten the length of ORSMA investigations. SMPAC members include Metropolitan Tikhon (episcopal moderator), Fr John Jillions (chair) Cindy Heise, Fr Eric Tosi, Dr Albert Rossi, Bernard Wilson, Robert Koory, Fr Alexander Garklavs and Pdn Peter Danilchick .

Legal Matters

Once again a fair amount of time has been devoted to discussing and responding to active and potential legal matters, all of which will be reported on greater detail by Judge Lanier, Angela Parks and the MC Legal Committee.

Chancellor's Calendar since the September 2016 MC Meeting (selected events)

September 2016

- 24 St Sergius celebration at chancery with seminarians
- 26 Peer-group facilitator training, St Tikhon's Monastery, South Canaan, PA
- 27 Elevation of the Cross (OC) at St Nicholas Cathedral, NYC (Moscow Patriarchate), with Met Tikhon and Bp John (MP); Fordham University Orthodox Center, *Fr John Meyendorff Lecture* by Dr Vera Shevzov.
- 28 University of Toronto, installation of Metropolitan Andrey Sheptytsky Institute of Eastern Christian Studies
- 29 Metropolitan Joseph (Antiochian Archdiocese) visited Chancery for lunch and discussion
- 30 St Vladimir's Seminary Board retreat

October

- 1 Orthodox Education Day, St Vladimir's Seminary, *Fr John Meyendorff Lecture* by Dr Mary Cunningham.
- 5 SMPAC teleconference
- 6 St Innocent
- 11 Sharon Ross, SVS Director of Institutional Advancement
- 12 Bishop Paul and Pastoral Abuse Committee
- 13 Funeral of Archimandrite Alexander (Pihach), Toronto
- 14 Board of Theological Education conference call
- 17-21 Fall session of the Holy Synod
- 21 US Mission to the United Nations, concert by Clarion Society of Steinberg's *Passion Week*
- 24 SMPAC teleconference
- 26 Pilgrims from Ukraine visit the Chancery; Pastoral Life meeting
- 27 Meeting on background checks (*Protect My Ministry*)

November

Chancellor's Report to the Metropolitan Council

February 21, 2017

- 2 SMPAC teleconference; interview with Orthodox Christian Network (OCN)
- 3 Officers meeting with Metropolitan Tikhon
- 8 Bishop Irinej (Serbian Archdiocese of North America), meeting and lunch at Chancery
- 10 Representative of Billy Graham Association, Washington conference: persecuted Christians
- 10-11 St Vladimir's Seminary, Board of Trustees, Yonkers, NY
- 11-12 100th anniversary, Archdiocese of Pittsburgh and Western PA
- 19 Saints Cosmas and Damian Board, Jersey City, NJ
- 20-23 St Tikhon's Seminary Board and accreditation site visit (ATS), South Canaan, PA
- 28 Department of Pastoral Life
- 29-30 Archives Advisory Committee

December

- 1 Daria Safronova-Simeonoff, archivist of St Herman Seminary
- 5 St Vladimir's Seminary, meeting of Metropolitan Tikhon with faculty and staff
- 6 St Nicholas
- 7-8 Pre-conciliar Commission, 19th AAC
- 8 Rev Dr Daniel Buda, World Council of Churches; reception for Cambridge in America (NYC)
- 13 St Herman of Alaska; anniversary of repose of Fr Alexander Schmemmann
- 14 "Faith and Ecology" conference, Green Seminary Initiative (Union Theological Sem., NYC)
- 15 Pension Board at Chancery; memorial service for slain Coptic Christians (Staten Island, NY)
- 21 Chancery staff pre-Christmas lunch, hosted by Metropolitan Tikhon
- 24-25 Christmas services
- 31-1 New Year services

January 2017

- 3 Officers meeting with Metropolitan Tikhon
- 5-6 Theophany services
- 10 Department of Pastoral Life; blessing of chancery
- 15 Liturgy and celebration of Fr Daniel Hubiak's 90th Birthday (Berlin, MD)
- 18 SMPAC teleconference
- 19 Teleconference on website redesign
- 24 Annual meeting of diocesan chancellors and treasurers at Chancery
- 25 Fr Chad Hatfield; webinar Green Seminary Initiative; St Vladimir's Seminary Board teleconference
- 27 Dr Will Cohen, President, of the Orthodox Theological Society
- 30 St Vladimir's Seminary: Three Hierarchs, Met Tikhon meeting with students and Schmemmann Lecture (Dr Lewis Patsavos)

February

- 1 Webinar Green Seminary Initiative
- 2 Meeting of Our Lord; funeral service for Mat Juliana Schmemmann (Yonkers, NY)
- 3 Funeral Liturgy (Yonkers, NY), burial (St Tikhon's Monastery)
- 7 Department of Pastoral Life

Chancellor's Report to the Metropolitan Council

February 21, 2017

16 Officers meeting with Metropolitan Tikhon; Mat Tamara Skvir (Chair, Archives Committee)

17-18 Archdiocese of Washington, Council meeting with Metropolitan Tikhon

20 Meeting of Standing Synod

Respectfully submitted,

Fr John A. Jillions,
Chancellor

February 21, 2017

Appendix 1: Matushka Anna Olympievna Turkevich (1882-1925)

Appendix 2: Clergy Compensation Review in the Diocese of the West (Fr David Lowell)

February 21, 2017

Appendix 1

Matushka Anna Olympieva Turkevich (1882-1925)

Fr John Jillions

At the Fall meeting of the Holy Synod one of the items the bishops discussed was the Canonization Committee. Among the committee's tasks is gathering information related to the life and work of Metropolitan Leonty (Turkevich), 1876-1965, who is buried at St Tikhon's Monastery.

Long before he was elevated to the episcopacy in 1933, then Fr Leonid Turkevich had an extraordinarily active life of service from 1906 as a missionary priest, seminary rector, writer, poet, editor and administrator when Saint Tikhon brought him to America. During that early period and throughout the tumultuous years following the Bolshevik Revolution, Fr Leonid was accompanied at every step by his wife, Matushka Anna Olympieva, mother of their five children.

Her untimely death in 1925 was a devastating blow to Fr Leonid. At the time, he had been editor for many years of the American Orthodox Messenger [Amerikanskiy Pravoslanyi Vestnik], the main church newspaper. Here is the obituary and poem he wrote to commemorate her repose. It appeared in the issue of September 1925 (26:9), but actual publication was delayed until November that year, presumably because of Matushka Anna's death and the family burdens of the aftermath. The household included her widowed mother, Matushka Julia Chervinsky (73) and five children: John (19), Vladimir (17), Irene (13), Anthony (10) and Nicholas (7). Matushka Anna is buried in the Russian section of Mount Olivet Cemetery in Queens, New York. Vladimir Turkevich died in 1949 and is buried next to her.

May her years of service alongside Fr Leonid for the building up of the Church in America never be forgotten. Memory eternal!

I am grateful to OCA Archivist Alexis Liberovsky for checking and correcting the translation.

On the Death of A Priest's Wife

On August 15th (2nd Old Calendar) [1925] in New York, **Anna Olympieva Turkevich**, the wife of cathedral archpriest L. Turkevich, died from pulmonary tuberculosis.

The deceased was a native of the Volyn Diocese, daughter of priest O. Chervinsky, who for many years was the area dean and also founder of the Diocesan Women's College. Anna Olympieva studied at the school where she later served as a school matron. After her marriage and arrival in America, the deceased never stopped working in the field of education, leading parish schools in Minneapolis over the course of several years. In the same city of Minneapolis she was president of the Protection Women's Society and also

February 21, 2017

organized another women's society, named for the Nativity of the Mother of God. In New York she was occupied with charitable works and for five years was the president of the Russian Charity Society, organizing bazaars and concerts to benefit the Society and the Children's Home [orphanage] both in Springfield, Vermont and in South Canaan, Pennsylvania. In addition, she was a teacher at the Women's College in Brooklyn and taught the Russian language at the Cathedral parish school.

The departed had a lively and sociable disposition and stood out for her exuberant energy in the activities to which she devoted herself. The multiple difficulties in the circumstances of her life, without a defined salary and with a large family, prompted her to take on much sewing work to supplement income. Her health was undermined and a cold she caught in 1923 developed into pleurisy and then became tuberculosis of the lungs, taking her to the grave while still a young woman, at the age of 43. Funeral services for the deceased were conducted by Metropolitan Platon and a multitude of clergy. She was buried in the Russian section of Mount Olivet Cemetery next to Brooklyn.

May your rest on earth and your communion with the saints in God in heaven be peaceful.

A Remembrance of A.O.Turkevich

She was alive
And now—she's dead...
What's the point now, weeping,
Of my whispered words?

She doesn't breathe,
Her face is death.
She cannot hear—
The cries or shouts.

Her body doesn't move,
Her spirit has departed,
She is stretched out and pale,
Her gaze extinguished.

Her hands are now submissive,
And like a worn-out whip lie still,
By work and troubles
Overpowered.

Her eyelids are covered,
She is dead:
Earthly hopes
Are empty words.

Before her is the mystery
Of other worlds,
Inexpressible
In words.

There, beyond the threshold,
A living cloud of saints:
And now, in God's presence,
She is among them.

As a servant of Christ
She has gone forever
To that new life
Of which we've heard...

I believe, O God,
In Your words,
Although on a bed,
She now lies dead.

Clergy Compensation Review in the Diocese of the West with Recommendations for Discussion

Between February and September of 2016, I spoke with most Rectors in the Missionary, Rocky Mountain, and Pacific Northwest Deaneries and several Rectors of the Central, Desert and Southwest Deaneries. In addition, I reviewed salary and housing allowance numbers which parishes reported for the Diocese of the West.

This report does not contain anyone's private information, but gives an aggregate overview of enduring categories and challenges. This report is written in an uncomplicated way that can be shared with the Diocese as well as the Orthodox Church in America – a basic overview with suggestions.

I. Healthcare Insurance - Generalizations

- 1) Mission Priests who have jobs pay their own health care costs.
- 2) Clergy in established parishes have health insurance paid by the parish *or* through a spouse's outside employment. Established parishes that rely on a Matushka's outside health plan for their priest's benefits are not looking ahead to see how they will meet that cost in the future.
- 3) Lower-income clergy have benefited from cost reduction through Obamacare and are generally pleased that the parish can easily afford it. As for the ease of working through health care exchanges, experience varies from state to state.
- 4) For higher-income clergy, health costs remain expensive and unpredictable.

II. Salary – Generalizations, definitions and norms

1) Compensation

A. For comparison purposes, compensation is defined as monetary salary plus housing allowance. Housing allowance is either paid directly to the priest for housing, or is computed as the rental market value of the rectory. These combined numbers should be equal to the median family income for the area in which the parish is located.

B. "Total package" is a term which has confused clergy, parishioners and – most dangerous of all – the Matushki. Total package includes *all* employer costs. It is not valid for comparison to median family income. This has caused confusion and hard feelings in salary negotiations.

C. Median Family Income and Median Household Income are figured differently. How is Median Income determined? Washington State government's website advises that county, state, and federal agencies use different methods for tracking data, thus

yielding different median estimates. Some areas only report Median Household Income. Websites in any given region often give different numbers.

U.S. Census data often lags by several years.

Some local Chambers of Commerce do not update their numbers promptly. Some real estate and consumer service sites will update numbers more frequently yet these can be more volatile numbers – maybe good, maybe not.

These days, Parish Council members can google median numbers during a meeting. It can be helpful to come to a meeting with a well-researched range of numbers. In very expensive areas, these numbers can be quite different, but in most areas of the country the various median estimates will be within a few thousand dollars. This sets a pretty tight target which a Parish Council ought to be able to hit.

2) Current 2016 clergy compensation for established parishes

Most established parishes in the Diocese of the West are reasonably close to paying median income for their area. “Reasonably close” – for me – is any gap which the parish can make a plan to remedy within two fiscal years.

- A. Approximately 25% of parishes compensate are at or close to median income.
- B. Approximately 20% of parishes pay within 10K of median income with the potential to close that gap with a little planning.
- C. Approximately 22% of parishes are small missions where compensation norms do not yet apply, a priest and perhaps the wife working outside jobs.
- D. Approximately 20% of our parishes are in very high income areas where property values are sky-rocketing. This group offers a special set of problems to be discussed under housing and again under retirement plans.
- E. The remainder – approximately 13% - includes places that did not report housing allowances last year, or are missions without rectors or fall within a generous margin of error.

Note: The precise percentage points and inevitable fluctuations are not important. These are the enduring categories we have in the Diocese of the West, always with us. The two categories which we can address profitably at the Diocesan level are “B” which involves action and “D” which involves planning (to be discussed further at the end).

3) Pension Plan

The DOW clergy who are eligible to participate in the OCA pension plan do so. Exceptions are few.

III. Housing

1) Rectories or housing allowance general trends

A. Several clergy with families who live in rectories say it is a mixed blessing, not ideal.

B. Parishes who do not have rectories (the majority) pay housing allowance to cover priest's rent.

In areas where housing costs are sky-rocketing, the parishes without rectories face a challenge: the current housing allowance paid to the clergy now is often inadequate to give the next priest a foothold in the area. (One priest said that when he retires, the next priest will have to commute the same way teachers and fireman now have to do.)

2) Home ownership

A. Priests who have outside jobs (or money from parents or inheritance) often prefer to own and gain equity in property.

B. Rectors who own their homes also tend to want to stay with the parish until they retire.

IV. Retirement horizons

A. Three priests have hard retirement dates, while many more rectors see it looming and are ambivalent.

B. Clergy who own their own home near the church express concern that they will be...what?

1) Required to go to church somewhere else?

2) Feel conflicted because they can walk to church and the new rector has to commute from afar?

3) Pained by the transition?

4) Or, in the case of clergy who do not own their own home and have no significant assets – will they have to move out of the area, lose their social connections, everything at once? For some, that is unthinkable.

C. Should priests continue for as long as they can, into their late seventies?

1) Several expressed the risk of riding their parishes too long and thwarting its growth.

2) Particulars vary, but anxiety and ambivalence are strong.

D. While it was suggested at our Diocesan Council meeting that it would be good to know the planned retirement dates of our clergy, this is too difficult a conversation for most clergy to have candidly.

V. A Conundrum

Most of the clergy I spoke with felt their parish was doing the best they could under the circumstances. When I suggested that it is important for the parish not to fall too far behind (or it will hit them all at once when there is a pastoral transition), many priests suggested that they felt fine with the way things are.

This pattern causes me to wonder if it is our clergy who are uncomfortable facing difficult questions, are reluctant to plan for the future. While the onus is usually placed on the parish council, I suggest that when things are going okay, it is the priest who offers the first line of resistance for future planning.

At the same time, many rectors lament the lack of attention. One rector wrote: “On a side note, no dean, to my knowledge, has ever addressed the parish here on my behalf regarding finances...we came here 25 years ago...”

VI. Suggestions and Recommendations for further discussion

A. With Mary Caetta, we will produce a **standard clergy compensation form** that the priest and parish council keep. It states:

- 1) amount of cash salary
- 2) housing allowance amount/value (These are the only dollar amounts listed.)
- 3) that parish will pay health insurance
- 4) that parish will pay into the OCA pension fund
- 5) if life insurance is included, this is added here

(Percentages are sometimes used in items 3-5).

Other budgeted items such as gas or mileage reimbursement, worker’s compensation, disability insurance, or any other general employer costs are *not* compensation. (These are often called “total package”. Bad words. Do not use.)

Compensation is what the priest and his family live within and spend at their own discretion for their family.

B. **Deans** can engage parishes now which are within easy planning distance of reaching median family income. This should be done well before each parish’s annual meeting. Parishes need lead time to make a plan. Deans should make this a standard discussion item at semi-annual Dean’s meetings – not to review particular situations, but to share approaches to helping parish councils plan.

C. The Diocese can develop strategies that allow parishes to help rectors to buy housing within the local parish area. (Some parishes have done this.)

Request that the Diocesan Council create a sub-committee to examine trust strategies for parish use. Hypothetical example: A parish pays the down payment and retains title on a house which the rector wants to buy. Designated housing allowance pays the monthly mortgage. At whatever point the rector has enough money or adequate equity to refinance, the rector can take title to the house with repayment back to the parish of the original down payment. A trust agreement ensures that the parish will not be tempted to plunder the asset if property values rise, yet guarantees that it retains the asset if the priest does not work out and goes elsewhere – a trust agreement with legal guidance can be a very simple, minimalist document.

D. Parishes who would not be able to afford current market rate housing today if their present priest was suddenly no longer with them need to create a fund or a plan to anticipate the day when this will happen.

This, too, is what Deans can help offer to Parish Councils.

E. Is every Dean comfortable carrying on these negotiations? Can every Dean make the time commitment necessary to meet with every Parish Council in their Deanery? The most likely answer is “no”. The Deans could look at others in the DOW who may have competency and interest in this area, engage them, and evaluate the results with the Diocesan Council, or more likely, in the privacy of the regular gathering of the Deans.

Concluding Remark:

In most areas of the United States the median family income did not rise between 2007-2012, and although it is beginning to rise since 2013, most of our established parishes in the DOW are close enough that with targeted advice, Parish Councils can be helped to close that gap over one or two fiscal years.

Report of ORSMA
Metropolitan Council Meeting
Spring, 2017

Report is confidential

MC Meeting February 21, 2017

Report of the Sexual Misconduct Policy Advisory Committee (SMPAC)

Members: Metropolitan Tikhon (*ex officio*), Archpriest John Jillions (*ex officio*, Chancellor, Chair), Archpriest Eric Tosi (*ex officio*, Secretary), Archpriest Alexander Garklavs, Protodeacon Peter Danilchick, Mrs. Cindy Heise (*ex officio*, Coordinator, ORSMA, Secretary of SMPAC), Mr. Robert Koory, Esq., Dr. Albert Rossi, Mr. Bernard Wilson (Chief of Police, Retired). Judge E.R. Lanier, OCA General Counsel may also participate in meetings.

SMPAC Charter

The Sexual Misconduct Policy Advisory Committee (“Committee”) was created by Metropolitan Jonah on January 28, 2010 to work with and assist the Office of Review of Sexual Misconduct Allegations (“Office”). The Committee was initially known as the “Sexual Misconduct Allegations Review Committee.” The Charter remained in effect during this time. The Charter was again reviewed and approved by the Holy Synod of Bishops at the Fall 2013 meeting.

Authority, responsibility and supervision

The Committee is under the authority of the Holy Synod and is chaired by the Chancellor of the Church, who is the day-to-day supervisor of the Office. The Committee operates in an advisory capacity only and does not assume any responsibility for the handling of sexual misconduct allegations, because that responsibility properly belongs to the Diocesan Hierarchs and the Office, according to the revised *Policies, Standards, and Procedures on Sexual Misconduct*. Committee members are appointed by the Holy Synod of Bishops.

Background

The complexity of sexual misconduct allegations requires a multi-dimensional awareness of issues and skills in various disciplines, so that allegations of misconduct may be considered from several perspectives—spiritual, ethical, legal, clinical as well as pastoral. Overlapping and interrelation between these disciplines can best be addressed by a team approach, such as via a standing advisory committee to assist the Holy Synod of Bishops and the Office.

Duties

- 1 Provide advice on how to improve both the content and effectiveness of the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct*.
- 2 Assist in reviews of the extent to which the Church’s revised *Policies, Standards, and Procedures on Sexual Misconduct* are implemented in practice and how compliance with them is ensured.
- 3 Assist in finding and nominating qualified professionals, who would be called on to do investigations when occasions arise.
- 4 Assist in developing increased and improved training for clergy, Church employees, and applicable laypersons to enable a better understanding of their duties under the revised

Policies, Standards and Procedures on Sexual Misconduct, including their mandatory reporting obligations under various state laws.

- 5 Assist in any other requests for advice made by the Holy Synod of Bishops and the Office.

Highlights from SMPAC meetings since Fall 2016 meeting of the Metropolitan Council

September 2016

- Discussed the possibility of centralizing the criminal background check process for the entire OCA, and the pros and cons of such a process
- Clergyman in Crisis Protocol: it was suggested that a case review of clergy in need of supervision take place on a regular basis. It would be most appropriate for His Beatitude to conduct these case reviews with individual bishops on a regular basis, perhaps quarterly

October 2016

- ORSMA should have a written policy on how to handle when a person confesses sexual abuse (that violates the law) to a priest during the Sacrament of Holy Confession. Currently, there seems to be an inconsistency in people's understanding.
- Fr. Alexander will research this topic and draft a paper with some recommendations.

November 2016

- Fr. Alexander's paper on Confession was reviewed. He will initiate contact with the heads of seminaries with the blessing of His Beatitude.
- Reviewed the written proposal for a central background check process drafted by Cindy Heise. This will be reviewed by all of the bishops and voted on.
- Celibate clergy statistics in regard to sexual misconduct was reviewed; this has been brought to the attention of the Pastoral Life Department.

December 2016

- The proposal for a central background check process was passed by the Holy Synod. Cindy Heise will move forward with setting up a central account and liaison with each diocese.

January 2017

- Reviewed a proposal regarding length of investigations. Minor changes to the proposal were suggested.
- Discussed the possibility of making public the current stats for compliance in the OCA. There was not agreement among all members of SMPAC that this is something the OCA should do.

Secretary's Report
Archpriest Eric George Tosi
Spring 2017 Metropolitan Council Meeting
February 21 to February 23, 2017

1. Overview

There were a number of projects which moved forward since the last Metropolitan Council meeting. These will be discussed later in the report. Among those highlighted is the planning for the 19th All American Council, the website refurbish, and the Archives project. There are other items that will require the decision and/or the recommendation of the Metropolitan Council.

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 Human Resource Committee of the Metropolitan Council has been working on the review of the job descriptions and the organizational chart. I have provided them all of the material I have and have spoken to them on background of the current organization. Certainly this needs to be reviewed from time to time as position and people have changed over the years.

The annual job reviews have been given to the staff and we are currently working on completing them.

The new chancery database continues to be worked on and refined. Barry is working closely with Ryan on the operational side in order to have a more effective report producing procedure in place. In conjunction with this, Barry continues to spend a large amount of time going through the database correcting and editing the entries. This is a time consuming project as it seems that each new correction opens up additional corrections. In addition, Barry has worked closely with the dioceses correcting clergy records. He has also instituted some additional links making the search between parish and clergy more efficient. Ryan's IT report is attached but it should be noted that his work is constrained by the budget so projects do take longer than anticipated. Ryan and Melanie are very diligent in keeping this ongoing work on budget.

The next phase is continuing to complete the main database project and have it feed into Raiser's Edge and elsewhere. Barry has begun this process as records are being migrated to the other system. Eventually, the plan is for dioceses and parishes to be able to update their information and generate reports by themselves. This is still for the future.

We have contracted with Rich Tirpak to have a new server installed at the Chancery as the current one is old, and basically dying. By the time of the Metropolitan Council, the new server will have been installed.

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 lie in planning, administration and management of the many areas for which I am responsible. But lately we have been able to be proactive in planning and enacting some forward looking programs. The 501 C 3 master list continues to be updated and submitted in a timely manner and I continue to work with a number of parishes on their status.

His Beatitude has directed me to examine the gift reception policy for the Chancery in order to establish a database for all of the gifts given to Chancery employees. This will enable us to track who gave the gift, the value and where it actually resides. In putting together this database, I discovered that the OCA really does not have a gift reception policy in place. This is common for non-profits and Churches on all levels. I have attached a proposed gift acceptance policy for approval by the Metropolitan Council. The General Counsel has reviewed this matter. It is open to any edits as I tried to work on a system of accountability which made sense. I urge the adoption of the policy as well as a recommendation for the Synod to institute a similar policy in their dioceses and parishes. It is for our own protection.

I will reiterate the need to continuing to look at the operations and committee program on the Metropolitan Council. We need to make sure we are effectively utilizing the limited time we have together and ensure that the work of the Council is addressed. Over the past few years as the situation in the Church stabilized, the enthusiasm for the committees has waned and it is often difficult to get reports. Perhaps a more effective method can be put forward which ensures participation and effectiveness in future operations of the Council? This should be discussed with His Beatitude to ensure we are meeting the needs of the Church.

I will also reiterate that we need to continue to examine various alternative structures and ideas for the Boards, Commissions, Departments, and Offices. With limited funding we need to find the best use of the talent of the Church to ensure that the multifaceted work of the Church continues as well as to plan for succession in these areas which is becoming more critical each year. Any input and assistance we can give in this area would be most helpful.

We completed our annual review with the Guide One and Travelers so that we are fully covered in the many areas. This has been effective as insurance coverage has been

extended on a few legal issues over the past six months. Judge Lanier and I have decided that we need to renegotiate the GAP program with Insurance Systems as a contract was signed in 2006. The GAP program has been very successful returning money (\$115,000 over the last three years which is divided among the participating parishes) to parishes under the loss control coverage. However, our concern is that we do not violate any 501 C 3 issues by partnering with a for-profit company. We are working on this and will renegotiate the program in order to protect the Church but continue the program.

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 General Counsel and 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 OCA is still waiting for New York to approve Religious Expression Coverage and I encourage every parish and diocese to get the same from their carrier. The cost is modest (about \$100 a year) but in the current religious climate, it can be a huge help if a parish faces legal action.

Much gratitude must go to Cindy Heise who continues to work on a system of background checks. Cindy will report on the progress on this but she continues to refine the system. I have done a number of checks on the system and am quite pleased. I have reviewed the Diocesan reporting forms at the last Diocesan Chancellor and Treasurers meeting. Much gratitude must be extended to Melanie as she has spearheaded this meeting for six years with great success.

We have also renegotiated with Canon on our copiers and scanners as our contract was finished. We have two new machines with more capabilities at a lower cost.

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.

Planning for the 19th All American Council has made great progress. I will be reporting on the AAC in separate report. We have held our first PCC meeting and made great progress. Dn. Peter and I have meet with the local committees in both St. Louis and Kansas City. All the local committee chairs are filled and they have been briefed on their responsibilities. We have a theme, a logo and a first run at the agenda. Of primary importance will be the acceptance by the Holy Synod with the Metropolitan Council's recommendation of a diocesan resolution process based on the "4 Pillars". We have also contracted Fr. Joel Wilson to do the AAC website as he did for the 18th AAC. We also have looked at the assessment structure and Melanie will have recommendations. Other items will be reported on separately.

5. Archives

First we must recognize the repose of Alexis Troubetzkoy who served as the chairperson of the Archives Committee with distinction. His wise leadership will be greatly missed. We are currently looking at who will be the new chairperson of the Committee.

The Committee did meet and discuss a number of items. This will be in a separate report by Alex Liberovsky. Among the most pressing issue is the physical state of the Archives. Some improvements have been made including sealing windows, installing monitors and new activated carbon filtered units. This has greatly improved the air quality and water issue. However, we do need to have a more substantial repair to the problem considering that we will not be in any position to put the archives into a new space for some years.

It was decided to look at doing repair work and improve the current space in the basement. Joshua Frankel, an archives/library architect reviewed and submitted a “needs” list for any repair work. In turn, Jim Smiros, a local architect looked at all the material and has submitted an assessment. Fr. John Perich has an architect and contractor scheduled to visit the Chancery to also submit a proposal. Finally John Della Monica, an architect, will be working with me on meeting with Oyster Bay Cove to begin the process of interacting with the town supervisors.

The basic plan is to work on the existing space which would include waterproofing the outside foundation walls, waterproofing and refinishing the walls, installing new lighting, electrical outlets and doors, covering the wiring and installing a HVAC system for the space. There may be the possibility of installing moveable shelving which will increase storage. It is recommended that money from the archives restricted fund be released for this purpose based on the proposal and work begin this summer. This will also mean relocating the archives to temporary storage during the construction. A fuller report will be presented separately.

We must also thank Fr. Daniel and Matushka Tamara Skvir for their dedicated work with Alex in combing through the archives and deaccessioning the holdings. They have accomplished much over the past few months.

Alex Liberovsky continues his work in the Archives in providing information and doing presentations on the history of the OCA. We are looking at two possible people to be unpaid interns for this very busy summer.

6. Estate Management

The major item for this year is the roof. While we thought they we still had a few years on the current roof, it is deteriorating faster than we expected. It is recommend that we replace the main center of the building roof this spring and the remaining sections the following year. This will also include resetting the gutters which were improperly

installed with nails and will solve the water drainage issue for the basement. I have attached a proposal for the work. There is basically no way around this issue.

A seminarian completed the painting in most of the rooms in the attic and we plan to complete that job in the summer and include the kitchen and mail room.

The expected pool removal still has not happened due to budgetary issues. 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 their 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. There are a number of dead trees that will need to be removed and we did have some fall during the spring and summer which we removed in a very cost effective manner. 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. While none of these projects is immediate, we do need to plan for them as they will be a considerable expense.

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 *OCA Review* continues to be published. The annual Desk Calendar was also sent out at the end of December. A few comments on the Desk Calendar. We begin the process in the summer and basically have most of the lay out completed by the middle of fall. What delays the publication is that a few dioceses do not have their assemblies until later in the year and we cannot publish this until we have their dates. The time between receiving the last of the dates, final review and printing and shipping is about one week. So it usually is complete by the time we release the Nativity message and so it goes out together. I cannot speed the process up despite receiving numerous enquiries.

The new website is proceeding. The contract was signed and a series of meetings with Simple Focus has happened. We are excited in this project and have had great input. We plan for the new website to go live in April. I am hoping to have a preliminary design for this meeting.

We are waiting for the final draft of the new metric book. The Synod has reviewed the copy and gave instructions and corrections. I plan to have the final proof ready for the Spring 2017 Holy Synod meeting and upon approval we will begin printing.

A final note is that we need to begin looking into preparing material for the upcoming 50th anniversary of the granting of autocephaly of the OCA. This could include a re-release of icons of American saints (of which I found some masters of the last printing) as well as 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

We will begin the planning for the third annual Mission School. I expect it to be held in the summer. I will be discussing location and curriculum (which is expected to remain the same) at the upcoming Holy Synod meeting. I have already received a few enquiries.

I continue to teach the Liturgics class at SVS on Tuesday evenings and I manage the Mentorship program for third year students at St. Vladimir's Seminary. There are also a host of issues relating to ordination and placement after graduation of which I am involved. Having me at SVS makes a great difference as the OCA is now more involved in the preparation of future OCA clergy.

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). I have been in close contact with DESMOS, the world Orthodox Scouting organization and have begun to assist in coordinating activities relating to the United States and world Scouting. The witness we provide to such events is incredibly important and we need to continue this work. Funding is being slashed for such work and we need to continue to support this important witness.

I do continue to accept, with His Beatitude's blessings, invitations to speak on evangelism. I have had a chapter published (along with Fr. Leonid Kishkovsky) in a recently published book *The Mission of God: Studies in Orthodox and Evangelical Mission* by Regnum Press. I am also beginning the work on my own book on evangelism and expect to release this in a year. 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 your forgiveness.

**OCA ARCHIVES ADVISORY COMMITTEE
REPORT TO THE METROPOLITAN COUNCIL
Spring 2017**

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*

Archpriest Vladimir von Tsurikov

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.

On November 29-30, 2016, the Committee held a fruitful meeting (see <https://oca.org/news/headline-news/archives-advisory-committee-concludes-third-meeting>), focused principally on discussion of the professional assessment of facilities conditions in the OCA Archives conducted earlier in the year and remediation of current environmental conditions in the Chancery basement in order to improve the preservation environment in the OCA Archives. Acknowledging that the Archives cannot be adequately preserved in the basement in the long term, the Committee discussed several options for the Archives’ eventual relocation to an appropriate facility to ensure their preservation for future generations. The meeting also projected digitization of film, video and audio recordings as a priority, due to their limited shelf life.

Less than two months after that meeting, Alexis Troubetzkoy, the Committee’s Chairman since its inception, reposed in the Lord on January 22, 2017 (see obituary here: <https://oca.org/in-memoriam/alexis-s.-troubetzkoj>). Although unwell, Mr. Troubetzkoy chaired and actively participated in the November meeting. The members of the Committee profoundly mourn his

passing: in the words of a committee member, he was "a dear, gracious and wise gentleman. How blessed we were to have had him lead us!"

Activities since the Committee's November meeting have included planning and exploring costs for possible interim remediation measures in the current basement facilities in order to improve preservation conditions until a new appropriate facility can be built onsite or the archives are relocated elsewhere. Work also continues on deaccessioning extraneous items in our collections, mostly multiple copies of various church publications.

As in the past several years, an application has been submitted for a student intern for the summer from Adelphi University's Community Fellows Program. Additionally, two applications have been received from qualified individuals seeking to intern in the OCA Archives this summer. Therefore, if all necessary arrangements can be worked out, there could be as many as three interns assisting in the work of the OCA Archives this year to alleviate a backlog of unsorted material and other projects.

The Committee has also begun a process to select a new chairperson to spearhead its work.

As always, diverse visitors continue to visit the OCA Archives to conduct onsite research, and the Archivist continues to respond to a wide-range of inquiries seeking historical information or documentation on a daily basis.

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

Respectfully submitted,

Alexis Liberovsky
OCA Archivist
Secretary – Archives Advisory Committee

February 2017 report on technology services

Ryan Platte, Technical Manager, Orthodox Church in America

My major focus has been on preparing for an improved hosting arrangement, as our deployed versions of OS, programming language, and CMS are all reaching end-of-life, and new options offer us improvements in both cost and performance. I upgraded the ExpressionEngine software that powers our website to the most recent version prior to the new 3.x series and fixed numerous issues that surfaced. I am midway through the process of removing or replacing unneeded tools that aren't compatible with the new EE version. I've done heavy work on the new host that will run the site after the 3.x upgrade.

Our web team joined Metropolitan Tikhon, the officers, and the team at Simple Focus in beginning the exciting work of redesigning the website. I've supplied them with analytics data, needed access, and other data and guidance to assist in the process.

As I mentioned in the fall update, work on the fully custom reporting to the Chancery database system continues. I still plan to complete that work by spring. In the meantime, I have supported Barry with bug fixes and ad hoc reports.

With phishing attempts not only in the headlines but also targeted at our staff, I have recommended to the officers that they adopt 2-factor authentication, and have assisted those that have made that change. Those that have adopted 2-factor authentication cannot have their accounts seized by someone guessing or knowing their password, even if an attacker tricks them into providing it.

I've worked with the team responsible for the various departments' courses at education.oca.org and am keeping that site maintained with their assistance.

My regular duties have brought quite heavy traffic as well, with plenty of challenges keeping me busy with system work, incident response, and support requests. Thanks to the team's efforts to protect my time, I've been able to reduce more of the backlog of requests than I had been able to do in the past.

**Orthodox Church in America
Treasurer's Report
February 2017**

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, 2016, a recap of the initial year on the Proportional Giving formula for Diocesan support, 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 2016 Financial Results (Exhibits A & B)

Exhibit A – Comparative Balance Sheets: Our balance sheet as of December 31, 2016 shows:

- Total assets of \$3,225,755;
- Total liabilities of \$388,283 (including funds due to Philadelphia Trust of \$99,000 for deposit into our Main Endowment, and \$50,000 due to Guide One for distribution to parishes as 2016 loss control bonus, and \$36,000 accrual for 2016 “payment in lieu of tax” to the town of Oyster Bay Cove);
- Net Assets of \$2,837,472.
- Total cash is \$181,237, of which \$110,059 is unrestricted.
- Assessments Receivable of \$210,660 include December assessments of \$113.1K (all received in Jan/Feb) and Guide One Group Insurance rebate of \$50.6K.
- Prepaid Expenses of \$14.6K include 2017 Blackbaud maintenance fees (\$11.3K) and postage machine lease expense (\$3.3K).
- Liabilities include \$221K in payables and accrued expenses, \$40K in retirement obligation to Matushka Glagolev, and \$1.7K representing the balance due on the automobile loan.
- Our net assets at the beginning of the year were \$2,547,260, and with the net surplus for the year of \$290,212, the balance at December 31, 2016 is \$2,837,472.

Exhibit B –1 Recap Actual versus Budget

The 2016 budget projected a net surplus across all funds of \$13,774. Our actual result was a surplus of \$290,212, for a positive variance of \$276,441. Please note that the bulk of the surplus is the result of unrealized gains in the endowments. The Operating Fund had a surplus of \$26,714, the Temporarily Restricted Fund had a deficit of \$13,047, with a surplus of \$276,548 in the Permanently Restricted funds. Exhibit B-1 is a one-page Recap of the activity for the year. Exhibit B-2 presents the details by department for 2016.

Highlights of the results are as follows:

P.O. BOX 675
SYOSSET, NY 11791-0675
TEL: 516.922.0550
FAX: 516.922.0954
WEBSITE: WWW.OCA.ORG

Unrestricted Funds:

- Revenues – Total revenues exceeded budget by \$72,883, with \$29,228 in assessments; \$58,490 in general contributions, including a bequest of \$39,941. Continuing Ed Workshop revenues were under budget by \$14,650.
- Expenses – Total expenses were over budget by \$63,296, with the bulk of this in the Administrative area due to the addition of a full time Secretary to the Metropolitan as of July 1, 2016 (\$26.6K). Metropolitan’s office expenses were over by \$15.4K due to increased travel of \$11.1K, gifts for official visits (\$2.8k) and auto expenses of \$1.6K related to maintenance and repair. Other departments’ variances were as follows:
 - Holy Synod was over budget by \$7.8K due mainly to travel.
 - Metropolitan Council expenses were over-budget by \$2.6K due mainly to increased length of September meeting through St Sergius celebration on the following weekend.
 - Property Support was over budget by \$2.5K due to increase in the “Payment in lieu of taxes” to town of Oyster Bay Cove.
 - Communications and TOC was under budget by \$6.9K due to no editions of the TOC being printed.
 - External Affairs was over budget by \$5.9K due to increased travel for Father Pihach funeral and subsequent trip to Moscow.
 - Other Special Commissions:
 - ORSMA – Expenses of \$82.8K were under budget by \$14.8K.
 - Strategic Planning, which includes the Office of Continuing Education, was over budget by \$3.7K.
 - Psychological Testing was over budget by \$11.5K.
 - Total Operating Results were a surplus of \$54,008 vs budget of \$44,421 for a positive variance of \$9,587.
- Stewards of the OCA:
 - Revenues of \$73,046 include:
 - \$65.2K in Stewards donations;
 - \$7.8K in DVP and Liturgical Music Program fees.
 - Total revenues were over budget by \$8.8K.
 - Expenses of \$100,340 were under budget by \$4,510.
- Net Operating Surplus of \$26,714 vs budget of \$3,750.

Restricted Funds:

- Temporarily Restricted Funds: Total revenues were \$31,879, including a bequest of \$12,856 which was placed in this fund and earmarked for a project in 2017 to revise and update the OCA website. Expenses of \$44,926 include the required annuity payments and \$24,625 for the annual Mission School.

- Permanently Restricted Funds: We had revenues of \$285,317, distributions and expenses of \$8,768 for a net surplus of \$276,549.

2016 Proportional Giving Recap (Exhibit C)

2016 was the initial year of funding according to the formula in the resolution passed at the 18th All-American Council held in July 2015. Our 2016 budget anticipated \$1.754 million in funding from the dioceses; the actual funding for 2016 was \$1.780 million. Exhibit C includes the historical giving by diocese for 2014 and 2015 under the “head tax” formula, along with the initial 2016 projection and the 2016 actual. This analysis also projects the anticipated giving by diocese for 2017 and 2018 based on the diocesan budgets for 2017. It is worth noting that the 2016 actual giving by the 8 territorial dioceses was within \$7,200 of the projected \$1.688 million budget. Also noteworthy is the increased giving by the 3 ethnic dioceses (an increase of \$28.4K from the anticipated \$55.6K), and an increase of \$4.3K from the Diocese of Alaska which tithes 10% of its diocesan revenue to the OCA.

Stewards of the OCA, Other Donations and Bequests – 2016 (Exhibit D)

Exhibit D shows all donations by category for 2016, with the 2015 and 2014 information for comparison purposes. For 2016 we had 156 stewards contributing a total of \$65,196 as compared with 99 stewards and \$53,911 in 2015 and 60 stewards and \$35,126 in 2014. In addition, we received distributions from two large estates that have been pending for several years. The *Estate of Xenia Wiegel* has been settled and the OCA received a total of \$510,663 in three distributions during 2016. These funds, which are unrestricted, were deposited into the Main Endowment Investment account at Philadelphia Trust Co in order to finally repay loans from the endowment that occurred in 2007-2008. Many thanks go out to David Yeosock, a former Metropolitan Council member and Chair of the Financial Development Committee, for stepping in as Executor for the Estate on behalf of the Orthodox Church in America. In addition, we received a final distribution of \$25,000 from the *Estate of Charles Morse*. This bequest is restricted to Evangelization and Missions and this final distribution, received in January 2017, was deposited into the Missions Endowment at Philadelphia Trust Co. Much gratitude to Eugene Stack, the Executor of this estate, for his assistance in settling this estate.

6th Annual Chancellors/Treasurers Meeting:

The 6th annual Chancellors/Treasurers Meeting was held in Syosset on January 24, 2017, with eleven dioceses represented. This group reviewed the 2016 Recap of Proportional Giving and the projections for 2017-2018, and also started looking forward to the triennium 2019-2021 for which the financing formula must be determined at the 19th All-American Council to be held in July 2018. It has become joyfully clear that while the original mandate of this group has been accomplished, there is a real benefit to continuing these meetings and utilizing the knowledge, experience and perspective of this group to assist in carrying out the mission and vision of the Church.

Respectfully submitted,

A handwritten signature in cursive script, appearing to read 'Melanie Ringa', followed by a horizontal flourish.

Melanie Ringa
Treasurer

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2016 and Dec 31, 2015

EXHIBIT A

	December 31, 2016	December 31, 2015
ASSETS		
Current Assets		
<i>Unrestricted</i>		
TD Bank - Operating	\$ 92,494	\$ 78,226
TD Bank - Payroll	\$ 699	\$ 1,732
Astoria Bank- St.Sergius Chapel	\$ 16,301	\$ 18,659
Petty Cash- Chancery Office	\$ 565	\$ 574
	\$ 110,059	\$ 99,191
<i>Temporarily Restricted</i>		
TD Bank- All American Council	\$ 3,145	\$ 5,233
TD Bank - Restricted	\$ 28,610	\$ 42,922
TD Bank- Savings	\$ 39,423	\$ 39,404
	\$ 71,178	\$ 87,559
Total Cash	\$ 181,237	\$ 186,750
Accounts Receivable		
Assessments Receivable	\$ 210,660	\$ 117,600
Pledges Receivable	\$ -	\$ -
Desk Calendar Receivable	\$ -	\$ -
Total Accounts Receivable	\$ 210,660	\$ 117,600
Other Current Assets		
Bequest Receivable	\$ -	\$ 503,025
Due from OCA Pension Dept	\$ -	\$ 7,056
Prepaid Expense	\$ 14,638	\$ 14,291
Other	\$ -	\$ -
Total Other Current Assets	\$ 14,638	\$ 524,372
Total Current Assets	\$ 406,535	\$ 828,722
Fixed Assets		
Plant Fund - Real Estate	\$ 45,000	\$ 45,000
Plant Fund Building & Improve	\$ 533,229	\$ 531,783
Plant Fund Furniture & Equip	\$ 55,399	\$ 55,399
Plant Fund Auto & Garden Equip	\$ 96,172	\$ 96,172
Plant Fund Computer Equip	\$ 27,602	\$ 27,602
Plant Fund Software	\$ 33,000	\$ 33,000
Plant Fund Chapel Equip & Furn	\$ 25,000	\$ 25,000
Accum Deprec Bld & Improvements	\$ (368,182)	\$ (354,887)
Accum Deprec Furn & Equip	\$ (29,737)	\$ (26,709)
Accum Deprec Auto & Garden Equi	\$ (96,171)	\$ (85,589)
Accum Deprec Computer Equip	\$ (27,603)	\$ (23,277)
Accum Deprec Computer Software	\$ (33,000)	\$ (33,000)
Accum Deprec Chapel Equip & Fur	\$ (25,000)	\$ (25,000)
Total Fixed Assets	\$ 235,709	\$ 265,494

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2016 and Dec 31, 2015

EXHIBIT A

	December 31, 2016	December 31, 2015
Restricted Investments and Trusts		
FOS Ebdowment -Phila Trust Co	\$ 74,155	\$ 63,589
J McGuireTrust - Wells Fargo Advisors	\$ 210,663	\$ 209,910
Kavalenko Nimerut-Wells Fargo Advisors	\$ 76,107	\$ 72,446
St. Andrew's Endowment - Phila Trust Co	\$ 112,569	\$ 95,376
Main Endowment - Phila Trust Co	\$ 1,171,576	\$ 544,700
HVIZD Annuity	\$ 86,730	\$ 86,730
Mission Endowment - Phila Trust Co	\$ 851,711	\$ 721,160
Total Restricted Investments and Trusts	\$ 2,583,511	\$ 1,793,911
TOTAL ASSETS	\$ 3,225,755	\$ 2,888,127
LIABILITIES & EQUITY		
Current Liabilities		
Accounts payable and accrued Expenses	\$ 220,799	\$ 141,876
Deferred Revenue	\$ -	\$ -
Auto loan - Chase Auto Finance	\$ 1,764	\$ 11,465
Accrued endowment distributions	\$ -	\$ -
Retirement Obligation	\$ 40,637	\$ 47,203
Other (Loan Payable to Diocese of theSouth)	\$ -	\$ 6,798
Reserves for Archives	\$ -	\$ -
Total Current Liabilities	\$ 263,200	\$ 207,342
Long Term Liabilities		
Deferred Compensation and annuities		
Hvizd Annuity liability	\$ 76,728	\$ 76,728
Deferred revenue	\$ 327	\$ 8,769
Unitrust Liab reserves	\$ 48,028	\$ 48,028
Total Deferred compensation and annuities	\$ 125,083	\$ 133,525
Total Liabilities	\$ 388,283	\$ 340,867
Equity		
Unrestricted Net Assets, 12/31/11	\$ (705,117)	\$ (705,117)
Temporarily Restricted Net Assets, 12/31/11	\$ 1,818,363	\$ 1,818,363
Permanently Restricted Net Assets, 12/31/11	\$ 1,020,429	\$ 1,020,429
Total Net Assets	\$ 2,133,675	\$ 2,133,675
Current Year Activity - 2016	\$ 290,212	\$ -
Current Year Activity - 2015	\$ (93,427)	\$ (93,427)
Current Year Activity - 2014	\$ 89,175	\$ 89,175
Current Year Activity - 2013	\$ (54,791)	\$ (54,791)
Current Year Activity - 2012	\$ 472,628	\$ 472,628
Total Net Assets	\$ 2,837,472	\$ 2,547,260
Total Equity	\$ 2,837,472	\$ 2,547,260

Orthodox Church in America
Comparative Balance Sheets
As of December 31, 2016 and Dec 31, 2015

EXHIBIT A

TOTAL LIABILITIES & EQUITY	December 31, 2016	December 31, 2015
	\$ 3,225,755	\$ 2,888,127
	\$ -	\$ -
Unrestricted Surplus/(Deficit) - 2012	\$ 783,039	\$ 783,039
Temp Restricted Surplus/(Deficit)	\$ (311,942)	\$ (311,942)
Perm Restricted Surplus/(Deficit)	\$ 1,531	\$ 1,531
	<u>\$ 472,628</u>	<u>\$ 472,628</u>
Unrestricted Surplus/(Deficit) - 2013	\$ (52,031)	\$ (52,031)
Temp Restricted Surplus/(Deficit)	\$ (4,049)	\$ (4,049)
Perm Restricted Surplus/(Deficit)	\$ 1,289	\$ 1,289
	<u>\$ (54,791)</u>	<u>\$ (54,791)</u>
Unrestricted Surplus/(Deficit) - 2014	\$ 58,992	\$ 58,992
Temp Restricted Surplus/(Deficit)	\$ 26,734	\$ 26,734
Perm Restricted Surplus/(Deficit)	\$ 3,449	\$ 3,449
	<u>\$ 89,175</u>	<u>\$ 89,175</u>
Unrestricted Surplus/(Deficit) - 2015	\$ 14,977	\$ 14,977
Temp Restricted Surplus/(Deficit)	\$ (44,489)	\$ (44,489)
Perm Restricted Surplus/(Deficit)	\$ (63,915)	\$ (63,915)
	<u>\$ (93,427)</u>	<u>\$ (93,427)</u>
	\$ -	\$ -
Unrestricted Surplus/(Deficit) - 2016	\$ 26,711	\$ -
Temp Restricted Surplus/(Deficit)	\$ (13,047)	\$ -
Perm Restricted Surplus/(Deficit)	\$ 276,548	\$ -
	<u>\$ 290,212</u>	<u>\$ -</u>

Orthodox Church in America
Statement of Activities vs Budget- RECAP BY DEPARTMENT
For the year ended 12/31/16

EXHIBIT B -1

	FINAL Budget 2016	Actual Q1 2016	Actual Q2 2016	Actual Q3 2016	Actual Q4 2016	YTD 12/31/2016	2016 Budget 12/31/2016	Variance to Budget
Unrestricted Funds:								
Assessments	\$ 1,754,274	\$ 421,910	\$ 420,837	\$ 455,973	\$ 484,782	\$ 1,783,502	\$ 1,754,274	\$ 29,228
Contributions	\$ 2,000	\$ 41,766	\$ 2,750	\$ 3,725	\$ 12,249	\$ 60,490	\$ 2,000	\$ 58,490
Chapel	\$ 12,000	\$ 2,103	\$ 2,545	\$ 2,593	\$ 3,597	\$ 10,838	\$ 12,000	\$ (1,162)
Continuing Education Workshop Revenue	\$ 28,000	\$ -	\$ -	\$ 9,900	\$ 3,450	\$ 13,350	\$ 28,000	\$ (14,650)
Other	\$ 7,700	\$ 169	\$ 54	\$ 2	\$ 8,452	\$ 8,677	\$ 7,700	\$ 977
Total Revenues	\$ 1,803,974	\$ 465,948	\$ 426,186	\$ 472,193	\$ 512,530	\$ 1,876,857	\$ 1,803,974	\$ 72,883
Expenses:								
Executive Offices	\$ 427,159	\$ 106,302	\$ 106,149	\$ 107,845	\$ 104,903	\$ 425,199	\$ 427,159	\$ (1,960)
Administration	\$ 413,111	\$ 98,297	\$ 106,613	\$ 115,971	\$ 118,856	\$ 439,737	\$ 413,111	\$ 26,626
Metropolitan Expenses	\$ 48,655	\$ 21,746	\$ 7,856	\$ 13,372	\$ 21,135	\$ 64,109	\$ 48,655	\$ 15,454
Holy Synod	\$ 58,800	\$ 12,385	\$ 26,699	\$ 7,880	\$ 19,650	\$ 66,614	\$ 58,800	\$ 7,814
Metropolitan Council	\$ 27,300	\$ 9,073	\$ 949	\$ 16,900	\$ 2,979	\$ 29,901	\$ 27,300	\$ 2,601
Property Support	\$ 235,023	\$ 57,585	\$ 54,312	\$ 60,922	\$ 64,743	\$ 237,562	\$ 235,023	\$ 2,539
Communications/TOC	\$ 90,500	\$ 14,457	\$ 24,468	\$ 22,444	\$ 22,246	\$ 83,615	\$ 90,500	\$ (6,885)
External Affairs/ St Catherine's	\$ 115,575	\$ 31,711	\$ 32,597	\$ 26,971	\$ 30,263	\$ 121,542	\$ 115,575	\$ 5,967
Archives	\$ 100,524	\$ 25,030	\$ 25,041	\$ 26,764	\$ 24,742	\$ 101,577	\$ 100,524	\$ 1,053
St Sergius Chapel	\$ 8,250	\$ 1,707	\$ 3,932	\$ 2,217	\$ 6,311	\$ 14,167	\$ 8,250	\$ 5,917
Ordination Candidate Testing	\$ 12,000	\$ 7,150	\$ 6,247	\$ 4,000	\$ 6,175	\$ 23,572	\$ 12,000	\$ 11,572
Office of Policy on Sexual Misconduct	\$ 97,656	\$ 22,469	\$ 15,987	\$ 31,065	\$ 13,283	\$ 82,804	\$ 97,656	\$ (14,852)
Board of Theological Education	\$ 2,000	\$ 546	\$ -	\$ 260	\$ -	\$ 806	\$ 2,000	\$ (1,194)
PCC Expenses	\$ -	\$ -	\$ -	\$ 227	\$ -	\$ 227	\$ -	\$ 227
Church Planting Grants	\$ 101,000	\$ 27,500	\$ 27,167	\$ 25,700	\$ 25,300	\$ 105,667	\$ 101,000	\$ 4,667
Seminary Support	\$ 12,000	\$ -	\$ -	\$ -	\$ 12,000	\$ 12,000	\$ 12,000	\$ -
Strategic Planning-Continuing Education	\$ 10,000	\$ -	\$ -	\$ -	\$ 13,750	\$ 13,750	\$ 10,000	\$ 3,750
Total Operating Expenses	\$ 1,759,553	\$ 435,958	\$ 438,017	\$ 462,538	\$ 486,336	\$ 1,822,849	\$ 1,759,553	\$ 63,296
Net Operating Surplus/(Deficit)	\$ 44,421	\$ 29,990	\$ (11,831)	\$ 9,655	\$ 26,194	\$ 54,008	\$ 44,421	\$ 9,587
"Stewards of the Orthodox Church" and Departmental Ministries:								
Revenue (Appeals & DVP Program)	\$ 64,179	\$ 29,778	\$ 10,285	\$ 18,639	\$ 14,344	\$ 73,046	\$ 64,179	\$ 8,867
Expenses:								
Administrative Expenses	\$ 2,100	\$ -	\$ 699	\$ 290	\$ 84	\$ 1,073	\$ 2,100	\$ (1,027)
Institutional Chaplaincy	\$ 7,350	\$ 2,110	\$ 1,500	\$ 1,900	\$ 2,474	\$ 7,984	\$ 7,350	\$ 634
Evangelization	\$ 8,750	\$ 1,500	\$ 1,867	\$ 2,550	\$ 4,298	\$ 10,215	\$ 8,750	\$ 1,465
Liturgical Music	\$ 11,125	\$ 1,500	\$ 3,896	\$ 2,125	\$ 2,730	\$ 10,251	\$ 11,125	\$ (874)
Pastoral Life	\$ 10,000	\$ 1,500	\$ 1,500	\$ 2,562	\$ 1,500	\$ 7,062	\$ 10,000	\$ (2,938)
Christian Education	\$ 14,800	\$ 1,750	\$ 1,788	\$ 1,500	\$ 2,388	\$ 7,426	\$ 14,800	\$ (7,374)
Youth and Young Adults	\$ 28,525	\$ 3,746	\$ 7,299	\$ 11,771	\$ 11,473	\$ 34,289	\$ 28,525	\$ 5,764
Diaconal Vocations	\$ 13,625	\$ 3,000	\$ 3,775	\$ 4,017	\$ 3,000	\$ 13,792	\$ 13,625	\$ 167
Christian Service/Humanitarian Aid	\$ 8,575	\$ 1,500	\$ 1,500	\$ 1,500	\$ 3,748	\$ 8,248	\$ 8,575	\$ (327)
Total Expenses	\$ 104,850	\$ 16,606	\$ 23,824	\$ 28,215	\$ 31,695	\$ 100,340	\$ 104,850	\$ (4,510)
Net SOCA/Departmental Costs	\$ (40,671)	\$ 13,172	\$ (13,539)	\$ (9,576)	\$ (17,351)	\$ (27,294)	\$ (40,671)	\$ 13,377
Net Operating Income	\$ 3,750	\$ 43,162	\$ (25,370)	\$ 79	\$ 8,843	\$ 26,714	\$ 3,750	\$ 22,964
Net Operating Income (GAAP Basis)	\$ 3,750	\$ 43,162	\$ (25,370)	\$ 79	\$ 8,843	\$ 26,714	\$ 3,750	\$ 22,964
Temporarily Restricted:								
Revenues	\$ 20,000	\$ 8,542	\$ 3,047	\$ 5,935	\$ 14,355	\$ 31,879	\$ 20,000	\$ 11,879
Expenses	\$ (19,976)	\$ (7,969)	\$ (161)	\$ (27,387)	\$ (9,409)	\$ (44,926)	\$ (19,976)	\$ (24,950)
Net Surplus/(Deficit)	\$ 24	\$ 573	\$ 2,886	\$ (21,452)	\$ 4,946	\$ (13,047)	\$ 24	\$ (13,071)
Permanently Restricted:								
Revenues	\$ 10,000	\$ 13,968	\$ 31,946	\$ 84,108	\$ 155,294	\$ 285,316	\$ 10,000	\$ 275,316
Expenses	\$ -	\$ (1,780)	\$ (2,272)	\$ (2,090)	\$ (2,626)	\$ (8,768)	\$ -	\$ (8,768)
Net Surplus/(Deficit)	\$ 10,000	\$ 12,188	\$ 29,674	\$ 82,018	\$ 152,668	\$ 276,548	\$ 10,000	\$ 266,548
Total Change in Net Assets	\$ 13,774	\$ 55,923	\$ 7,190	\$ 60,645	\$ 166,457	\$ 290,215	\$ 13,774	\$ 276,441

**Orthodox Church in America
Statement of Activities vs Budget
For the Quarters Ended 12/31/16**

EXHIBIT B-2

	FINAL Budget 2016	Actual Q1 2016	Actual Q2 2016	Actual Q3 2016	Actual Q-4 2016	Actual Thru 12/31/2016	Variance to Budget	2015 Actual	2016 vs 2015
Unrestricted Funds:									
REVENUES									
Diocesan Assessments	\$ 1,754,274	\$ 421,910	\$ 420,837	\$ 455,973	\$ 484,782	\$ 1,783,502	\$ 29,228	\$ 1,911,140	\$ (127,638)
Contributions	\$ 2,000	\$ 41,766	\$ 2,750	\$ 3,725	\$ 12,249	\$ 80,490	\$ 58,490	\$ 9,383	\$ 51,127
St. Sergius Chapel	\$ 12,000	\$ 2,103	\$ 2,545	\$ 2,593	\$ 3,597	\$ 10,838	\$ (1,162)	\$ 10,988	\$ (160)
Investment Income	\$ 4,000	\$ 9	\$ 7	\$ (2)	\$ 5	\$ 19	\$ (3,981)	\$ (546)	\$ 565
Continuing Ed/orama Revenues	\$ 28,000	\$ -	\$ -	\$ 9,900	\$ 3,450	\$ 13,350	\$ (14,650)	\$ 15,600	\$ (2,250)
Other (Yearbook/Desk Calendar/OCPC Royalty)	\$ 3,700	\$ 160	\$ 47	\$ 4	\$ 8,447	\$ 8,658	\$ 4,958	\$ 7,894	\$ 764
TOTAL REVENUES	\$ 1,803,974	\$ 465,948	\$ 426,186	\$ 472,193	\$ 512,530	\$ 1,876,857	\$ 72,883	\$ 1,954,449	\$ (77,592)
EXPENSES									
Executive Offices									
Salaries	\$ 304,992	\$ 74,398	\$ 78,098	\$ 76,248	\$ 76,248	\$ 304,992	\$ -	\$ 305,214	\$ (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)	\$ 77,040	\$ 20,622	\$ 16,769	\$ 20,315	\$ 17,373	\$ 75,079	\$ (1,961)	\$ 107,419	\$ (32,340)
	\$ 427,159	\$ 106,302	\$ 106,149	\$ 107,845	\$ 104,903	\$ 425,199	\$ (1,960)	\$ 457,761	\$ (32,562)
Administrative Offices									
Salaries	\$ 102,600	\$ 31,748	\$ 31,634	\$ 57,064	\$ 54,508	\$ 174,954	\$ 72,354	\$ 114,482	\$ 60,472
Payroll Taxes	\$ 7,849	\$ 2,429	\$ 2,420	\$ 4,365	\$ 4,170	\$ 13,384	\$ 5,535	\$ 7,840	\$ 5,544
Benefits(Medical, Unemployment, Pension)	\$ 27,223	\$ 6,997	\$ 4,811	\$ 12,370	\$ 12,401	\$ 36,579	\$ 9,358	\$ 31,762	\$ 4,817
Legal	\$ 51,000	\$ 6,981	\$ 16,434	\$ 11,200	\$ 8,157	\$ 42,772	\$ (8,228)	\$ 25,885	\$ 16,887
Outside contractors	\$ 60,500	\$ 13,293	\$ 13,255	\$ 3,416	\$ 2,886	\$ 32,650	\$ (27,850)	\$ 30,567	\$ 2,083
Accounting/Audit	\$ 25,000	\$ -	\$ -	\$ 10,000	\$ 8,000	\$ 18,000	\$ (7,000)	\$ 34,000	\$ (16,000)
Travel & meetings - central admin	\$ 16,662	\$ 15,618	\$ 5,619	\$ 6,480	\$ 3,091	\$ 31,008	\$ 14,346	\$ 37,151	\$ (6,143)
Telephone	\$ 19,000	\$ 3,361	\$ 3,112	\$ 2,190	\$ 3,551	\$ 12,234	\$ (6,766)	\$ 15,615	\$ (3,381)
Equipment leasing	\$ 21,892	\$ 5,116	\$ 8,188	\$ 5,115	\$ 1,532	\$ 19,951	\$ (1,941)	\$ 21,274	\$ (1,323)
Postage, mailing services, printing & copying	\$ 18,000	\$ 2,800	\$ 2,639	\$ (203)	\$ 3,000	\$ 8,236	\$ (9,764)	\$ 9,704	\$ (1,468)
Computer expense	\$ 6,000	\$ 594	\$ 2,739	\$ 750	\$ 1,792	\$ 5,875	\$ (125)	\$ 9,246	\$ (3,371)
Stipends	\$ 35,400	\$ 6,000	\$ 6,000	\$ -	\$ 4,835	\$ 16,835	\$ (18,565)	\$ 34,893	\$ (18,058)
Office Supplies	\$ 2,500	\$ 558	\$ 320	\$ 863	\$ 4,963	\$ 6,704	\$ 4,204	\$ 7,340	\$ (636)
Food	\$ 4,500	\$ 1,949	\$ 1,795	\$ 2,256	\$ 2,330	\$ 8,330	\$ 3,830	\$ 5,923	\$ 2,407
Other administrative expenses(inc Auto)	\$ 4,000	\$ 784	\$ 886	\$ (1,527)	\$ 2,773	\$ 2,916	\$ (1,084)	\$ 7,204	\$ (4,288)
Insurance - D&O	\$ 3,541	\$ (1,775)	\$ 3,498	\$ -	\$ -	\$ 1,723	\$ (1,818)	\$ 1,858	\$ (135)
Payroll processing fees	\$ 3,244	\$ 956	\$ 717	\$ 766	\$ 880	\$ 3,299	\$ 55	\$ 3,144	\$ 155
Bank fees, registration fees	\$ 3,200	\$ 688	\$ 1,410	\$ 440	\$ (598)	\$ 1,942	\$ (1,258)	\$ 3,269	\$ (1,327)
Books, subscriptions, dues & other	\$ 1,000	\$ 180	\$ 936	\$ 427	\$ 802	\$ 2,345	\$ 1,345	\$ 2,745	\$ (400)
Total Administrative Offices	\$ 413,111	\$ 98,297	\$ 106,613	\$ 115,972	\$ 118,855	\$ 439,737	\$ 26,626	\$ 403,902	\$ 35,835
Metropolitan Expenses									
Metropolitan Travel	\$ 38,700	\$ 18,557	\$ 6,280	\$ 10,724	\$ 13,874	\$ 49,435	\$ 10,735	\$ 38,347	\$ 11,088
Office expense	\$ 1,930	\$ 1,607	\$ 78	\$ 148	\$ 5,470	\$ 7,301	\$ 5,371	\$ 4,352	\$ 2,949
Office of Military Chaplaincy - Stipends	\$ 6,000	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 6,000	\$ -	\$ 6,000	\$ -
Office of Military Chaplaincy - Expenses	\$ 2,025	\$ 82	\$ -	\$ 1,000	\$ 291	\$ 1,373	\$ (652)	\$ 1,319	\$ 54
Total Metropolitan Expenses	\$ 48,655	\$ 21,746	\$ 7,856	\$ 13,372	\$ 21,135	\$ 64,109	\$ 15,454	\$ 50,018	\$ 14,091
Holy Synod									
Travel	\$ 42,000	\$ 6,614	\$ 22,971	\$ 1,650	\$ 17,279	\$ 48,514	\$ 6,514	\$ 48,509	\$ 5
Special Episcopal Stipends	\$ 14,400	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600	\$ 14,400	\$ -	\$ 14,400	\$ -
Food	\$ 1,500	\$ 1,328	\$ -	\$ 2,630	\$ (1,226)	\$ 2,730	\$ 1,230	\$ 914	\$ 1,816
Legal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Office supplies, Postage	\$ 900	\$ 843	\$ 128	\$ -	\$ -	\$ 971	\$ 71	\$ 933	\$ 38
Episcopal Salary/Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,000	\$ (6,000)
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,188	\$ (1,188)
Total Holy Synod	\$ 58,800	\$ 12,385	\$ 26,699	\$ 7,880	\$ 19,651	\$ 66,615	\$ 7,815	\$ 71,944	\$ (5,329)
Metropolitan Council									
Travel and Meetings - MC	\$ 25,800	\$ 9,073	\$ -	\$ 16,900	\$ 2,979	\$ 28,952	\$ 3,152	\$ 29,011	\$ (59)
Internal Audit - Travel, Lodging and Meals, Supplies	\$ 1,500	\$ -	\$ 949	\$ -	\$ -	\$ 949	\$ (551)	\$ 477	\$ 472
	\$ 27,300	\$ 9,073	\$ 949	\$ 16,900	\$ 2,979	\$ 29,901	\$ 2,601	\$ 29,488	\$ 413
Property Support									
Salaries	\$ 46,350	\$ 11,588	\$ 11,588	\$ 11,586	\$ 11,588	\$ 46,350	\$ -	\$ 46,350	\$ -
Payroll Taxes	\$ 3,546	\$ 886	\$ 886	\$ 887	\$ 887	\$ 3,546	\$ -	\$ 3,546	\$ -
Lawn/Grounds Upkeep	\$ 30,000	\$ 7,435	\$ 7,225	\$ 8,915	\$ 9,350	\$ 32,925	\$ 2,925	\$ 40,105	\$ (7,180)
Benefits(Medical, Unemployment, Pension)	\$ 12,807	\$ 2,645	\$ 3,192	\$ 3,230	\$ 3,255	\$ 12,322	\$ (485)	\$ 12,253	\$ 69
Insurance	\$ 36,000	\$ 8,950	\$ 8,604	\$ 8,603	\$ 8,604	\$ 34,761	\$ (1,239)	\$ 35,014	\$ (253)
Depreciation	\$ 30,000	\$ 7,808	\$ 7,808	\$ 7,808	\$ 7,808	\$ 31,232	\$ 1,232	\$ 31,392	\$ (160)
Town Services Fee	\$ 32,000	\$ 8,000	\$ 8,000	\$ 8,000	\$ 12,162	\$ 36,162	\$ 4,162	\$ 34,017	\$ 2,145
Auto expense	\$ 4,600	\$ 2,464	\$ 1,025	\$ 1,878	\$ 2,349	\$ 7,716	\$ 3,116	\$ 7,851	\$ (135)
Electricity	\$ 13,000	\$ 3,110	\$ 1,578	\$ 4,919	\$ 2,869	\$ 12,476	\$ (524)	\$ 13,144	\$ (668)
Heating oil	\$ 23,000	\$ 4,083	\$ 2,055	\$ 493	\$ 3,190	\$ 9,821	\$ (13,179)	\$ 13,314	\$ (3,493)
Garbage removal	\$ 2,000	\$ 480	\$ 480	\$ 480	\$ 480	\$ 1,920	\$ (80)	\$ 1,920	\$ -
Outside contractors	\$ 100	\$ -	\$ -	\$ 988	\$ 606	\$ 1,594	\$ 1,494	\$ 1,290	\$ 304
Gas & Water	\$ 320	\$ -	\$ 104	\$ -	\$ 39	\$ 143	\$ (177)	\$ 198	\$ (55)
Supplies	\$ 1,300	\$ 136	\$ 1,767	\$ 3,135	\$ 733	\$ 5,771	\$ 4,471	\$ 2,617	\$ 3,154
Other	\$ -	\$ -	\$ -	\$ -	\$ 824	\$ 824	\$ 824	\$ -	\$ 824
Total Property Support	\$ 235,023	\$ 57,585	\$ 54,312	\$ 60,922	\$ 64,744	\$ 237,563	\$ 2,540	\$ 243,011	\$ (5,448)
Department of Communications and Ministries									
Printing, copying and postage "TOC"	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (15,000)	\$ -	\$ -
The Orthodox Church - Stipends	\$ 42,000	\$ 10,500	\$ 10,500	\$ 10,500	\$ 10,500	\$ 42,000	\$ -	\$ 53,822	\$ (11,822)

	FINAL Budget 2016	Actual Q1 2016	Actual Q2 2016	Actual Q3 2016	Actual Q-4 2016	Actual Thru 12/31/2016	Variance to Budget	2015 Actual	2016 vs 2015
Contract web master	\$ 30,000	\$ 3,581	\$ 13,594	\$ 11,550	\$ 10,425	\$ 39,150	\$ 9,150	\$ 29,993	\$ 9,157
Website hosting and maintenance	\$ 3,500	\$ 376	\$ 374	\$ 394	\$ 1,321	\$ 2,465	\$ (1,035)	\$ 3,013	\$ (548)
Benefits(Medical, Unemployment, Pension)-TOD	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 855	\$ (855)
Total Department of Communications and Ministries	\$ 90,500	\$ 14,457	\$ 24,468	\$ 22,444	\$ 22,246	\$ 83,615	\$ (6,885)	\$ 87,683	\$ (4,068)
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	\$ 12,786	\$ 12,786	\$ 12,785	\$ -	\$ 38,357	\$ (12,785)	\$ 51,162	\$ (12,805)
Interchurch travel	\$ 14,800	\$ 1,556	\$ 5,159	\$ 2,316	\$ 13,858	\$ 22,888	\$ 8,088	\$ 11,895	\$ 10,993
Telephone & office expense	\$ 3,800	\$ 2,778	\$ 5,155	\$ 2,375	\$ 3,464	\$ 13,772	\$ 9,972	\$ 8,636	\$ 5,136
Benefits - External Affairs(Medical, Unempl, Pension)	\$ 3,040	\$ 768	\$ 675	\$ 671	\$ 670	\$ 2,784	\$ (256)	\$ 3,333	\$ (549)
Other interchurch organizations	\$ 7,500	\$ 5,000	\$ -	\$ -	\$ 3,447	\$ 8,447	\$ 947	\$ 7,470	\$ 977
Total Department of External Affairs	\$ 115,575	\$ 31,711	\$ 32,597	\$ 28,971	\$ 30,282	\$ 121,541	\$ 5,968	\$ 117,789	\$ 3,752
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)	\$ 27,884	\$ 7,928	\$ 7,714	\$ 7,817	\$ 7,820	\$ 31,279	\$ 3,395	\$ 32,555	\$ (1,276)
Supplies/Travel	\$ 4,230	\$ -	\$ 225	\$ 1,843	\$ (179)	\$ 1,889	\$ (2,341)	\$ 16,311	\$ (14,422)
Total Department of History and Archives	\$ 100,524	\$ 25,030	\$ 25,041	\$ 28,783	\$ 24,743	\$ 101,577	\$ 1,053	\$ 117,275	\$ (15,698)
PCC Expenses									
Theological Education	\$ 2,000	\$ 546	\$ -	\$ 260	\$ -	\$ 806	\$ (1,194)	\$ 508	\$ 298
St Sergius Chapel	\$ 8,250	\$ 1,707	\$ 3,932	\$ 2,217	\$ 6,311	\$ 14,167	\$ 5,917	\$ 15,455	\$ (1,288)
Ordination Candidate Psychological Testing	\$ 12,000	\$ 7,150	\$ 6,247	\$ 4,000	\$ 6,175	\$ 23,572	\$ 11,572	\$ 29,165	\$ (5,613)
Planting Grants	\$ 101,000	\$ 27,500	\$ 27,167	\$ 25,700	\$ 25,300	\$ 105,667	\$ 4,667	\$ 107,934	\$ (1,667)
Seminary Support	\$ 12,000	\$ -	\$ -	\$ -	\$ 12,000	\$ 12,000	\$ -	\$ 39,000	\$ (27,000)
Policies and Procedures Regarding Sexual Misconduct	\$ 97,656	\$ 22,469	\$ 15,987	\$ 31,065	\$ 13,283	\$ 82,804	\$ (14,852)	\$ 84,900	\$ (2,096)
Strategic Planning-Continuing Education	\$ 10,000	\$ -	\$ -	\$ -	\$ 13,750	\$ 13,750	\$ 3,750	\$ 12,900	\$ 850
TOTAL OPERATING EXPENSES	\$ 1,759,553	\$ 435,958	\$ 438,017	\$ 462,538	\$ 486,339	\$ 1,822,852	\$ 63,299	\$ 1,868,153	\$ (45,301)
NET OPERATING SURPLUS(DEFICIT)	\$ 44,421	\$ 29,990	\$ (11,831)	\$ 9,655	\$ 26,191	\$ 54,005	\$ 9,584	\$ 86,298	\$ (32,291)
Stewards Income & Expenses									
Stewards of the OCA Revenue	\$ 59,179	\$ 29,028	\$ 9,285	\$ 13,064	\$ 13,819	\$ 65,196	\$ 6,017	\$ 53,129	\$ 12,067
Diaconal Vocations Revenue	\$ 3,500	\$ 750	\$ 1,000	\$ 1,750	\$ 525	\$ 4,025	\$ 525	\$ 3,500	\$ 525
Program Fees	\$ 1,500	\$ -	\$ -	\$ 3,825	\$ -	\$ 3,825	\$ 2,325	\$ 3,000	\$ 825
Dividends & Interest(net of investment fees)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total SOCA Income	\$ 64,179	\$ 29,778	\$ 10,285	\$ 18,639	\$ 14,344	\$ 73,046	\$ 8,867	\$ 59,629	\$ 13,417
Stewards of the OCA									
Ministries Conference	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SOCA Printing and Mailing Expense	\$ 2,100	\$ -	\$ 699	\$ 290	\$ 84	\$ 1,073	\$ (1,027)	\$ 2,497	\$ (1,424)
TOTAL SOCA Expense	\$ 2,100	\$ -	\$ 699	\$ 290	\$ 84	\$ 1,073	\$ (1,027)	\$ 2,497	\$ (1,424)
Net SOCA Income(Deficit)	\$ 62,079	\$ 29,778	\$ 9,586	\$ 18,349	\$ 14,260	\$ 71,973	\$ 9,894	\$ 57,132	\$ 14,841
Departmental Expenses									
Department of Institutional Chaplaincy	\$ 7,350	\$ 2,110	\$ 1,500	\$ 1,900	\$ 2,474	\$ 7,984	\$ 634	\$ 7,403	\$ 581
Department of Evangelization	\$ 8,750	\$ 1,500	\$ 1,887	\$ 2,550	\$ 4,298	\$ 10,215	\$ 1,465	\$ 15,422	\$ (5,207)
Department of Liturgical Music & Translations	\$ 11,125	\$ 1,500	\$ 3,896	\$ 2,125	\$ 2,730	\$ 10,251	\$ (874)	\$ 12,301	\$ (2,050)
Department of Pastoral Life & Vocational Development	\$ 10,000	\$ 1,500	\$ 1,500	\$ 2,562	\$ 1,500	\$ 7,062	\$ (2,938)	\$ 20,847	\$ (13,785)
Department of Christian Education	\$ 14,800	\$ 1,750	\$ 1,788	\$ 1,500	\$ 2,388	\$ 7,426	\$ (7,374)	\$ 14,831	\$ (7,405)
Department of Youth and Young Adults	\$ 28,525	\$ 3,746	\$ 7,299	\$ 11,771	\$ 11,473	\$ 34,289	\$ 5,764	\$ 37,072	\$ (2,783)
Diaconal Vocations Program	\$ 13,825	\$ 3,000	\$ 3,775	\$ 4,017	\$ 3,000	\$ 13,792	\$ 167	\$ 13,288	\$ 504
Department of Christian Service	\$ 8,575	\$ 1,500	\$ 1,500	\$ 1,500	\$ 3,748	\$ 8,248	\$ (327)	\$ 7,287	\$ 961
Total Departmental Expenses	\$ 102,750	\$ 16,606	\$ 23,125	\$ 27,925	\$ 31,611	\$ 99,267	\$ (3,483)	\$ 128,451	\$ (29,184)
HONSDALE LOAN PRINCIPAL PAYMENTS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Net Income(Deficit)	\$ 3,750	\$ 43,162	\$ (25,370)	\$ 79	\$ 8,840	\$ 26,711	\$ 22,961	\$ 14,977	\$ 11,734
Extraordinary Items:									
Total Net Income(Deficit)	\$ 3,750	\$ 43,162	\$ (25,370)	\$ 79	\$ 8,840	\$ 26,711	\$ 22,961	\$ 14,977	\$ 11,734
Unrestricted Funds:									
Net Operating Surplus/(Deficit)	\$ 3,750	\$ 43,162	\$ (25,370)	\$ 79	\$ 8,840	\$ 26,711	\$ 22,961	\$ 14,977	\$ 11,734
Add Back Non-Cash Items (Depreciation & Amort)	\$ 30,000	\$ 7,808	\$ 7,808	\$ 7,808	\$ 7,808	\$ 31,232	\$ 1,232	\$ 31,392	\$ -
Total Operating Surplus/(Deficit) - Unrestricted	\$ 33,750	\$ 50,970	\$ (17,562)	\$ 7,887	\$ 16,648	\$ 57,943	\$ 24,193	\$ 46,369	\$ 11,734
Temporarily Restricted Funds:									
Revenues:									
- Charity	\$ 5,000	\$ 298	\$ (25)	\$ 2,830	\$ (604)	\$ 2,499	\$ (2,501)	\$ 1,082	\$ 1,417
- Missions & Church Planting Grants	\$ 5,000	\$ 3,154	\$ 455	\$ 25	\$ 363	\$ 3,997	\$ (1,003)	\$ 1,608	\$ 2,389
- Youth Ministry Bequest	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Seminary	\$ 5,000	\$ 2,402	\$ 25	\$ 25	\$ 1,013	\$ 3,465	\$ (1,535)	\$ 17,740	\$ (14,275)
- Kavalenko Trust	\$ 2,500	\$ 2,029	\$ 2,404	\$ 2,894	\$ 982	\$ 8,309	\$ 5,809	\$ 3,964	\$ 4,345
- McGuire Trust	\$ 2,500	\$ 859	\$ 188	\$ 160	\$ (254)	\$ 753	\$ (1,747)	\$ 347	\$ 406
- All American Council	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 340,334	\$ (340,334)
- Other Bequests	\$ -	\$ -	\$ -	\$ -	\$ 12,858	\$ 12,858	\$ 12,858	\$ 5,140	\$ 7,716
Total Temporarily Restricted Revenues	\$ 20,000	\$ 8,542	\$ 3,047	\$ 5,934	\$ 14,356	\$ 31,879	\$ 11,879	\$ 370,215	\$ (338,336)

	FINAL Budget 2016	Actual Q1 2016	Actual Q2 2016	Actual Q3 2016	Actual Q-4 2016	Actual Thru 12/31/2016	Variance to Budget	2015 Actual	2016 vs 2015
Expenses:									
- Charity	\$ 5,000	\$ -	\$ -	\$ 1,500	\$ 9	\$ 1,509	\$ (3,491)	\$ 2,823	\$ (1,314)
- Missions	\$ 5,000	\$ -	\$ -	\$ 24,086	\$ 539	\$ 24,625	\$ 19,625	\$ 28,904	\$ (4,279)
- Church Planting Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Seminary	\$ 5,000	\$ 5,110	\$ -	\$ -	\$ 2,477	\$ 7,587	\$ 2,587	\$ 12,506	\$ (4,919)
- Publications	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
- Kavalenko Trust	\$ 2,488	\$ 2,072	\$ (1,339)	\$ 1,544	\$ 949	\$ 3,226	\$ 738	\$ 4,957	\$ (1,731)
- McGuire Trust	\$ 2,488	\$ 325	\$ -	\$ -	\$ -	\$ 325	\$ (2,163)	\$ 325	\$ -
- All American Council (including PCC)	\$ -	\$ 462	\$ -	\$ 256	\$ 5,436	\$ 6,154	\$ 6,154	\$ 364,389	\$ (358,235)
- Other (Release from Restrictions)	\$ -	\$ -	\$ 1,500	\$ -	\$ -	\$ 1,500	\$ 1,500	\$ 800	\$ 700
Total Temporarily Restricted Disbursements	\$ 19,976	\$ 7,969	\$ 161	\$ 27,386	\$ 9,410	\$ 44,926	\$ 24,950	\$ 414,704	\$ (369,778)
Net Temporarily Restricted Surplus/(Deficit)	\$ 24	\$ 573	\$ 2,888	\$ (21,452)	\$ 4,946	\$ (13,047)	\$ (13,071)	\$ (44,489)	\$ 31,442
Permanently Restricted Funds:									
Revenue:									
- St Andrew's Endowment	\$ 2,500	\$ 1,986	\$ 1,557	\$ 3,098	\$ 11,045	\$ 17,684	\$ 15,184	\$ (6,499)	\$ 24,183
- Mission Endowment	\$ -	\$ 7,460	\$ 17,812	\$ 41,112	\$ 67,990	\$ 134,374	\$ 134,374	\$ (36,614)	\$ 170,988
- Main Endowment	\$ 5,000	\$ 3,298	\$ 11,710	\$ 38,077	\$ 69,281	\$ 122,366	\$ 117,366	\$ (7,727)	\$ 130,093
- FOS Endowment	\$ 2,500	\$ 1,224	\$ 867	\$ 1,823	\$ 6,979	\$ 10,893	\$ 8,393	\$ (3,484)	\$ 14,377
Total Revenues	\$ 10,000	\$ 13,968	\$ 31,946	\$ 84,108	\$ 155,295	\$ 285,317	\$ 275,317	\$ (54,324)	\$ 339,641
Funds Released:									
- St Andrew's Endowment	\$ -	\$ 119	\$ 122	\$ 123	\$ 127	\$ 491	\$ 491	\$ 1,613	\$ (1,122)
- Mission Endowment	\$ -	\$ 901	\$ 910	\$ 931	\$ 981	\$ 3,723	\$ 3,723	\$ 2,198	\$ 1,527
- Main Endowment	\$ -	\$ 681	\$ 1,159	\$ 1,172	\$ 1,216	\$ 4,228	\$ 4,228	\$ 4,740	\$ (512)
- FOS Endowment	\$ -	\$ 79	\$ 81	\$ 82	\$ 84	\$ 326	\$ 326	\$ 1,042	\$ (716)
Total Funds Released	\$ -	\$ 1,780	\$ 2,272	\$ 2,308	\$ 2,408	\$ 8,768	\$ 8,768	\$ 9,591	\$ (823)
Net Permanently Restricted Surplus/(Deficit)	\$ 10,000	\$ 12,188	\$ 29,674	\$ 81,800	\$ 152,887	\$ 276,549	\$ 266,549	\$ (63,915)	\$ 340,464
Total Change in Net Assets	\$ 13,774	\$ 55,923	\$ 7,190	\$ 60,427	\$ 166,673	\$ 290,213	\$ 276,439	\$ (93,427)	\$ 383,640

The Orthodox Church in America
 Diocesan Proportional Giving
 For the Triennium 2016-2018
 With 2014 and 2015 for Reference

Exhibit C
 Revised 2/14/17

	2014		2015		2016		2016		2017		2018		Based on Annual Diocesan Budgets of:
	Actual	% Decrease	Actual	% Decrease	Budget	Actual	Difference	Budget	Budget	% Decrease	Budget	% Decrease	
Archdiocese of Washington	\$ 69,276.00		\$ 68,490.00		\$ 57,926	\$ 59,426.00	\$ 1,500.00	\$ 57,048.96	\$ 54,671.92	\$ 118,852.00			
Diocese of the South	\$ 228,528.00		\$ 232,920.00		\$ 240,970	\$ 246,103.84	\$ 5,133.84	\$ 246,103.84	\$ 246,103.84	\$ 723,834.82			
Diocese of Eastern PA	\$ 246,924.00		\$ 232,650.00		\$ 200,000	\$ 188,069.36	\$ (11,930.64)	\$ 180,546.59	\$ 173,023.81	\$ 376,138.72			
Diocese of New England	\$ 163,668.00		\$ 154,440.00		\$ 151,500	\$ 151,510.00	\$ 10.00	\$ 145,449.60	\$ 139,389.20	\$ 303,020.00			
Diocese of Western PA	\$ 187,500.00		\$ 213,018.00		\$ 169,000	\$ 125,798.40	\$ (43,201.60)	\$ 151,968.00	\$ 145,636.00	\$ 316,600.00			
Diocese of New York/NJ	\$ 301,020.00		\$ 288,630.00		\$ 217,573	\$ 219,630.00	\$ 2,057.00	\$ 210,844.80	\$ 202,059.60	\$ 439,260.00			
Diocese of the Midwest	\$ 467,528.00		\$ 422,188.00		\$ 423,605	\$ 456,762.43	\$ 33,157.43	\$ 438,491.93	\$ 420,221.44	\$ 913,524.86			
Diocese of the West	\$ 225,036.00		\$ 217,080.00		\$ 228,100	\$ 234,112.84	\$ 6,012.84	\$ 234,112.84	\$ 234,112.84	\$ 688,567.18			
Totals	\$ 1,889,480.00		\$ 1,829,416.00		\$ 1,688,674	\$ 1,681,412.87	\$ (7,261.13)	\$ 1,664,566.56	\$ 1,615,218.65	\$ 3,879,797.58			
Albanian Archdiocese	\$ 21,600.00		\$ 21,600.00		\$ 21,600.00	\$ 33,000.00	\$ 11,400.00	\$ 33,000.00	\$ 33,000.00				
Bulgarian Diocese	\$ 5,000.00		\$ 5,000.00		\$ 5,000.00	\$ 10,000.00	\$ 5,000.00	\$ 10,000.00	\$ 10,000.00				
Romanian Episcopate	\$ -		\$ 24,000.00		\$ 24,000.00	\$ 36,000.00	\$ 12,000.00	\$ 36,000.00	\$ 36,000.00				
Archdiocese of Alaska	\$ 1,916,080.00		\$ 1,895,016.00		\$ 1,754,274.00	\$ 1,779,752.29	\$ 25,478.29	\$ 1,763,566.99	\$ 1,714,219.06				
Decrease	\$ (78,989.70)		\$ (21,064.00)		\$ (115,263.71)	\$ (6%)	\$ (25,478.29)	\$ (16,185.30)	\$ (349,347.92)				
% Decrease	-4.0%		-1%		-6%		-1%	-1%	-3%				

Cumulative Decreases
 from 2013 - Proj 2018
 (2013 Base was \$1,995,070)

\$ (100,053.70)

\$ (215,317.41)

\$ (231,502.71)

\$ (280,850.64)

-14%

Exhibit D

ORTHODOX CHURCH IN AMERICA
ALL DONATIONS 2014-2016
LISTED BY PURPOSE OF DONATION

Purpose	2016		2015		2014	
	# Donors	Amount	# Donors	Amount	# Donations	Amount
Chapel Donations	14	\$ 6,797.00	11	\$ 7,157.00	12	\$ 9,402.00
Charity Appeal	19	\$ 3,549.00	8	\$ 1,367.33	13	\$ 1,666.00
Clergy Care Fund	-	-	1	\$ 200.00	1	\$ 3,000.00
Christian Service/Humanitarian Ai	-	-	1	\$ 120.00	-	-
Earmarks	8	\$ 10,230.64	1	\$ 5,705.00	4	\$ 3,400.00
General Donations	7	\$ 3,680.00	9	\$ 3,474.00	10	\$ 3,074.00
Liturgical Music Donations	2	\$ 465.00	6	\$ 615.00	4	\$ 255.00
Mission Appeal	10	\$ 4,022.00	7	\$ 1,798.33	11	\$ 3,599.00
Seminary Appeal	4	\$ 3,464.51	10	\$ 17,740.35	6	\$ 10,362.69
Stewards of the OCA	156	\$ 65,196.00	99	\$ 53,911.00	60	\$ 35,126.40
Youth Grant	-	-	-	-	1	\$ 2,500.00
Bequests	2	\$ 52,797.63	1	\$ 5,000.00	1	\$ 51,521.89
Totals	222	\$ 150,201.78	154	\$ 97,088.01	123	\$ 123,906.98

Estate Proceeds:

<i>Estate of Xenia Wiegel</i>	\$ 510,663.00	Proceeds deposited into Main Endowment at Philadelphia Trust Co.
<i>Estate of Charles Morse</i>	\$ 25,000.00	Proceeds deposited into Mission Endowment at Philadelphia Trust Co.