
METROPOLITAN COUNCIL of the ORTHODOX CHURCH IN AMERICA

REPORTS
2025 Fall Session

Wednesday, October 8, 2025
Hotel Belvoir (Hilton), Springfield, VA

Thursday, October 9, 2025
St. Luke Serbian Orthodox Church, McLean, VA



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LOGISTICS, SCHEDULE and AGENDA ITEMS
Regular Fall 2025 Session of the Metropolitan Council
October 8-9, 2025
St. Luke Serbian Orthodox Church & The Hotel Belvoir - Springfield

Lodging & Meetings: Hotel Belvoir Springfield
6550 Loisdale Road
Springfield, Virginia, 22150

Divine Liturgy & Meetings: St. Luke Serbian Orthodox Church
6801 Georgetown Pike
McLean, VA 22101

Tuesday, October 7, 2025

All afternoon and evening arrivals. Meals on own.

Wednesday, October 8, 2025

8:00a Breakfast at hotel
9:00a First Session
10:30a Break
10:45a Second Session
12:30p Lunch
1:30p Third Session
6:00p Dinner at hotel
7:00p Orientation

Thursday, October 9, 2025

8:00a Departure for St. Luke Orthodox Church
9:00a Divine Liturgy
10:30a Brunch
11:30p Fourth Session
2:00p Break
2:15p Fifth Session
4:00p Return to hotel
6:00p Dinner at local restaurant

Friday, October 10, 2025

Departures

Tentative Agenda – Wednesday, October 8, 2025, 8:00-4:30 pm EST

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call – Archpriest Alessandro Margheritino
5. Approval of the Minutes of the Special Spring Sessions (4.28.25), (5.21.25), (6.10.25), and (6.17.25) & Regular Spring 2025 Session
6. Report of the Metropolitan – His Beatitude Metropolitan Tikhon
7. Report of the Chancellor – Archpriest Alessandro Margheritino
8. Pension Report – Pension Board
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10. External Audit – Mr. Andrew Smith
11. Legal Report – Mr. Mark Hamilton
12. All-American Council – PDn Peter Ilchuk
13. OCA Departments – Archpriest Justin Patterson
14. Office of Pastoral Life – Archpriest Nicholas Solak
15. Concluding Remarks – His Beatitude
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Tentative Agenda – Thursday, October 9, 2025, 11:30-4:30 pm EST

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call– Archpriest Alessandro Margheritino
5. Property Committee – Greg Honshul
6. Report of the Secretary – Priest David Bozeman
7. Report of the Treasurer – Mr. Andrew Smith
8. 2026 Budget – Mr. Andrew Smith
9. 2026 Metropolitan Council Sessions – Archpriest Alessandro Margheritino
10. Concluding Remarks – His Beatitude
11. Adjournment – His Beatitude
12. Prayer – His Beatitude

**REPORT OF THE METROPOLITAN
AUTUMN 2025 METROPOLITAN COUNCIL**
TEMPORARY CHANCERY OF THE ORTHODOX CHURCH IN
AMERICA SPRINGFIELD, VIRGINIA
OCTOBER 8-9, 2025

1.0 Welcome. I welcome the members of the Metropolitan Council to our regular Autumn meeting here at the temporary chancery offices in Springfield. It is good to be with you in person as we devote ourselves to the sacred responsibilities which fall to this administrative body. We gather not exclusively for administrative deliberations but as one distinct expression of the unity of the Orthodox Church in America as she strives to fulfill her Apostolic work on this continent. Our part in this work indeed requires attention to administrative, legal, and financial matters, but our approach to these should be, above all, a “churchly” approach, one founded not merely on rational assessment and professional expertise (though these are welcome and necessary) but above all on our love for Jesus Christ, the one who gathers us together, our communion with the saints, and our communal participation in the spiritual and liturgical life of the Orthodox Church. As we know, this year marks the centennial of the falling asleep of one of the pillars of the Orthodox Church in America, Saint Tikhon, the Patriarch of Moscow and Enlightener of North America. We will mark his commemoration on his appointed feast day tomorrow with the celebration of the Divine Liturgy at St. Luke’s Orthodox Church in McLean, Virginia. Saint Luke’s is a parish of the Archdiocese of Washington, and the liturgy will be celebrated in a newly-constructed temple that was just consecrated in May of this year.

2.0 Saint Tikhon’s vision. Though our historical context might be quite different, we can look to Saint Tikhon as a model for us today. Both in America and in Russia, he was a unifying figure, a true leader who was faithful in maintaining the sacred order of the Church, strong in resisting schisms, and at the same time committed to conciliarity. One of the highlights of the most recent All-American Council was the presentation offered by Dr. Scott Kenworthy who reminded us of the transformative role Saint Tikhon played in his early life and in his service in North America, even prior to his patriarchal leadership during the Bolshevik Revolution and Soviet persecution. Saint Tikhon’s commitment to conciliarity and to encouraging the participation of the clergy and laity provided him with a unique experience as he later ascended the

patriarchal throne during a time of persecution and the need to carefully navigate the relationship of the Church with the Soviet state. Here in North America, the Church has not had to pass through such difficult times. And yet, Saint Tikhon's approach can be instructive for us.

3.0 In his first sermon at his new cathedral in San Francisco in 1898, Saint Tikhon emphasized the principle of conciliarity in his leadership, stating: "My request for assistance I address, first of all, to my closest assistants, the pastors of the Aleutian church. I am entering this country for the first time, knowing it very little; while you have been laboring here for a long time, you have started earlier than I... My hope is that in my forthcoming service to you, you will be able to be of great service to me in your knowledge of this land and its people, and through your experience become, indeed, *co-laborers*, men of counsel and reason." Likewise to the faithful, he spoke these words: "I ask for assistance and cooperation not only from the pastors, but also from my entire beloved flock. The Church of Christ is likened by the holy apostle Paul to a body, while a body has not one member but many. These have not one and the same function but each its own: the eye its own, and the arm its own. Each member is necessary and cannot be without the other, they all have concern for each other and there is no division in the body."

4.0 ***The All-American Council.*** Such an approach is what we see at work in our gathering here at the Metropolitan Council and at other Church-wide gatherings such as the All-American Council. The most recent of these, the 21st All-American Council, which was convened in Phoenix, Arizona, was, by the grace of God, a great success on a number of levels. I offer my gratitude to Protodeacon Peter, our Council Manager, the members of the Preconciliar Commission, our Council Chairs, the volunteers of the local committees and all who worked collaboratively with the chancery office in organizing a very successful All-American Council. The theme "Gathered Together by Christ," was a fitting reminder of the reality that it is the Lord himself who gathers us together whenever we come together in his Name. It is in his Name that conducted the established business of the Council --the consideration of all statutorily-required reports, elections to various Church-wide positions, and debate over resolutions and amendments. A statute amendment concerning the Pension Board, presented by the Diocesan Council of the Diocese of the South was debated and rejected by the

delegates. Likewise, an amendment put forth by this body that would provide for fixed beginning and ending dates of service for newly-elected diocesan representatives to the Metropolitan Council also did not pass. The failure to pass these amendments is an affirmation of the conciliar process at work, as was the successful adoption of other matters, such as a funding resolution for the next triennium and a resolution regarding the vetting of candidates for the Pension Board. The latter resolution directs the Metropolitan Council to establish this vetting process and to present it to the Holy Synod before their Fall 2027 session.

5.0 Other significant happenings at the All-American Council included a dinner which was held in honor of Archbishop Benjamin on the occasion of his retirement and the nomination by special assembly and election by the Holy Synod of a new bishop for the Diocese of the West to fill the see of San Francisco. We offer our gratitude to His Eminence Archbishop Benjamin for his many years of faithful archpastoral service and our prayers of encouragement to His Grace Bishop Vasily as he shoulders the mantle of episcopal ministry. The nomination and election of a new bishop are two of the signs of our responsibility as an autocephalous Orthodox Church. Other signs of this responsibility are the canonization of new saints and the recognition of other autocephalous Churches, both of which were highlights this year for the Orthodox Church in America.

6.0 ***New members elected at the All-American Council.*** Of course, one of the significant actions of the All-American Council is the election of six at-large delegates to the Metropolitan Council. I take the opportunity to welcome those who were so elected this past July in Phoenix:

6.1 *Archpriest Timothy Sawchak*, the rector of Holy Trinity Church in Gardner, Kansas in the Diocese of the Midwest;

6.2 *Archpriest Sean Levine*, from the military chaplaincy of the Orthodox Church in America, who serves as Force Management Officer for the US Army Chief of Chaplains here at the Pentagon and who assists in various ways within the Archdiocese of Washington;

6.3 *Archpriest Christopher Foley*, rector of Holy Cross Church in Kernersville, North Carolina from the Diocese of the South, whom we welcome back for a second term;

6.4 *Matushka Miho Ochiai Ealy* from the parish of St. Paul the Apostle in Dayton, Ohio, where her husband, Fr. Gregory serves as Rector. Matushka Miho has faithfully served as one of the original members of the Clergy Wives Ministry of the Office of Pastoral Life and we are glad to have the voice and experience of the clergy wives here on the Metropolitan Council;

6.5 *Dr. Peter Bouteneff*, who is Professor of Systematic Theology, Kulik Professor of Sacred Arts, and Associate Dean for Institutional Mission and Engagement at the Orthodox Theological Seminary of Saint Vladimir; and

6.6 *Mr. David Lane* from the Diocese of the West who returns to the Metropolitan Council in this new role after having served as lay delegate from his diocese for the past three years.

6.7 I note here also that two alternates were elected at the All-American Council: Archpriest Justin Mathews from the Diocese of the Midwest and Alexis Liberovsky. Alex joins us today not as an alternate but at my invitation in order to assist us with the secretarial duties related to the Metropolitan Council, that is, for the taking of minutes, which he has experience doing for many years with faithfulness and, in addition, with attention to the history and patrimony of the Orthodox Church in America for which he continues to care as Archivist Emeritus.

7.0 ***New diocesan members.*** At this session, we also welcome a number of new diocesan delegates to the Metropolitan Council.

7.1 *Ms. Crystal Anastasia Dushkin* from the Diocese of Alaska;

7.2 *Deacon Marc Schmidt*, from Saint Nicholas Cathedral of the Bulgarian Diocese;

7.3 *Priest Daniel Greeson*, Rector of Saint Peter and Saint Paul in Burr Ridge, Illinois, my home parish as an Orthodox Christian, in the Diocese of the Midwest;

7.4 *Matushka Mary Buletza-Breton* from the Diocese of New York and New Jersey, and who is well-known to this body from her service as chair of the Pension Board for many years;

7.5 *Ms. Genevieve Lyday* from the Diocese of the South and currently a member of the Board of Trustees of Saint Vladimir's Seminary; and

7.6 *Priest Andrew Smith*, Associate priest at the Holy Trinity Cathedral in San Francisco.

8.0 We welcome all of you and look forward to your contributions on the Metropolitan Council. Since we have so many new members, I invite all of you to introduce yourselves or reacquaint yourselves with one another over the days of our meeting.

9.0 ***Travel and Activities.*** You have received the log of my activities since the time of our meeting in February. I will not go through that log in detail here but I would ask you to refer to it at your convenience to get a more comprehensive sense of my activities and visits. I will nevertheless highlight a few points regarding my activities and travel over the past months.

10.0 ***Canonization of Saint Olga.*** In June, the historic canonization (the first in 20 years for our Church) of Matushka Olga, now Saint Olga of Kwethluk, took place in Alaska. Along with many other bishops, I presided at the primary services in Kwethluk, with the celebration of the final panikhida, the vigil, and the Divine Liturgy. A large group of pilgrims from the diocese of Alaska and from throughout North America traveled to Kwethluk for this historic event held at Saint Nicholas Church on the Kuskokwim. With the other bishops and many of the same pilgrims, we then travelled to Saint Innocent Cathedral in Anchorage for a second celebration with a Vigil and Divine Liturgy at which the hymns to the new saint were sung once again. In July, of course, a third capstone celebration at the All-American Council provided an opportunity for a representation of the entire Church to participate in the glorification of Saint Olga with the Vigil and Divine Liturgy offered in her honor and in the presence of her relics.

11.0 ***Macedonian concelebration.*** Another significant event, one which I announced at the All-American Council, was the concelebration that took place at the beginning of September with His Beatitude, Archbishop Stefan of the Macedonian Orthodox Church – Ochrid Archbishopric. Six bishops of the Orthodox Church in America and a bishop representing the Serbian Orthodox Church concelebrated with the two primates at this historical liturgy at St Nicholas Cathedral in Washington, DC. This concelebration was significant for the Orthodox Church in America because it was an opportunity to formally respond to the Serbian Orthodox Church when they informed us of their action in granting autocephaly to the Macedonian Orthodox Church.

12.0 *Travel to other dioceses.* As part of my responsibilities as Primate of the Orthodox Church in America, I travel to other dioceses at the invitation of their bishop for various events or celebrations. At the beginning of May, I offered a talk at a symposium held in honor of the 10th anniversary of repose of Archimandrite Roman Braga at Holy Dormition Monastery in Rives Junction. Reflecting the growing sense of local veneration for Fr Roman, the Romanian Episcopate, at its most recent Congress, adopted a resolution to be presented to the Holy Synod with a request to initiate the process that would consider the sanctity of Fr. Roman. I will present that resolution to the Holy Synod next month and we will determine whether to initiate a process through the canonization commission. While in Phoenix for the All-American Council, I visited the Monastery of Saint John the Baptist, at which gathered a large number monks and nuns from the three sister communities. On the Sunday before the Council, I attended liturgy at Sts. Peter and Paul Orthodox Church where His Eminence Archbishop Daniel presided at his former parish. In August, I travelled to San Francisco for the consecration of Bishop Vasily. The consecration took place at Holy Trinity Cathedral, at which I presided with 5 bishops of the Orthodox Church in America and many guests from other jurisdictions. As part of my visit, I served for the feast of the Dormition at the Holy Assumption Monastery in Callistoga and the St Seraphim Cathedral in Santa Rosa. Most recently, I participated at the celebrations surrounding the 100th anniversary of pilgrimage at Fort Ross in California.

13.0 *Stavropegial Institutions.* I continue to maintain a schedule of regular visits to my stavropegial institutions which include two seminaries and three monasteries. This year, Saint Vladimir's Seminary filled the vacancy in the position of President by electing Dr Ionuț-Alexandru Tudorie. The Board of Trustees subsequently restored to Dr. Tudorie the title of Dean, and my own title was likewise restored to that of President of the Seminary. As such, I presently maintain the same title of President to reflect my oversight of both of our seminaries. For its part, Saint Tikhon's Seminary has broken ground on a major project of building married student housing with the expectation that 4-6 new units will be completed in time for next year's incoming class. I presided at the commencement exercises for both seminaries and, at the beginning of this academic year visited St Vladimir's for the Feast of the Nativity of the Mother of God and St Tikhon's for the feast of the

Exaltation of the Cross. As is my custom, I spent the First Week of Great Lent in retreat at St. Tikhon's Monastery.

14.0 External Affairs. My work in the area of external affairs encompasses a wide range of spheres including relations with the global Orthodox Churches, with the other Orthodox Churches on this continent, and with various ecumenical and civil organizations. I continue to participate in the Assembly of Bishops of the United States as a member of the Executive Committee (which meets on a quarterly basis) and as a participant in the annual Assembly. Last year's Assembly took place in Atlanta, Georgia, and this year's Assembly will take place in Denver, Colorado, at the beginning of November. On the local level, there were several Assembly activities, including Sunday of Orthodoxy services at Saint Catherine's Greek Orthodox Church in Falls Church (at which I was invited to offer the sermon). Most recently, I returned to Saint Catherine's for the Doxology that was offered in honor of His All-Holiness, Patriarch Bartholomew during his recent visit to the United States. Of particular note, the Assembly has recently created a new award which is intended to honor laypeople who have been active in supporting the work of the Assembly. This year, two such laypeople are being honored: Ms. Anne Glynn Mackoul from the Antiochian Archdiocese and a former chair of the Board of Trustees at Saint Vladimir's Seminary and our own Judge E.R. Lanier, the long-serving General Counsel for the Orthodox Church in America. Each of them will be honored with the Medal of Saint Theodora.

15.0 Other Concelebrations. Earlier in the year, on April 7, I had occasion to serve with hierarchs of other Churches: Metropolitan Nicholas (ROCOR) and Bishop Matthew (Moscow Patriarchate) on the occasion of the 100th anniversary of repose of Saint Tikhon at St Nicholas Cathedral in New York City. In June, along with many members of our own Holy Synod, I welcomed Bishop Matthew again, along with Bishop James (ROCOR) for the glorification services of Saint Olga in Alaska, and once again this past weekend with Metropolitan Nicholas and other bishops of ROCOR, as well as Metropolitan Maximilian of Irkutsk for the celebrations at Fort Ross.

16.0 The Archdiocese of Washington. Much of my activity and travel is accomplished within the geographic boundaries of the Archdiocese of Washington. As you can see from my log of activities, I have the benefit of being able to serve at and visit

my 11 parishes and missions on a regular basis. This has become much easier to accomplish since the physical relocation of the chancery and my residence to this area. In addition to these pastoral visits, I am moving forward with the process of integration of the chancery with the Archdiocese. At the most recent Assembly at the end of September, I articulated more fully a process which would see a more precise re-alignment of the de facto structure of the Archdiocese with the original intent of the Holy Synod's decisions in 1980 and 1981 when the Archdiocese was created as the primate diocese. In those decisions, it was clearly understood that, while the territorial part of the Archdiocese (that is, the parishes and missions in this geographic area) was a central component, the other two components – the military chaplaincy and the stavropegial institutions and clergy – were also intended to be part of the Archdiocese itself. I have initiated a process to more clearly define this situation which will necessitate an eventual revision of the Archdiocesan bylaws and may further require a Statute amendment.

17.0 *Activities in the Nation's Capital.* The chancery relocation has opened up opportunities for more active involvement in activities in the nation's capital. In my last report, I mentioned a number of events and meetings which took place in January and February surrounding the March for Life and the Religious Freedom Summit. Thanks to some introductions by our own Metropolitan Council representative, Jonathan Pageau, I met with representatives of the National Prayer Breakfast Foundation. In March, I attended the installation of Robert Cardinal Mackelroy, the newly appointed Archbishop for the Roman Catholic Archdiocese of Washington. More recently, on September 16th, I was invited to a dinner at the US State Department which was held in honor of the visit of Patriarch Bartholomew.

18.0 *New Officers for the Orthodox Church in America.* In December of last year, Archpriest Alexander Rentel offered his resignation as Chancellor of the Orthodox Church in America, which I reluctantly accepted. Effective January 1, 2025, I assigned Fr. Alexander as Rector of Three Hierarchs Chapel where he continues to teach and serve as the Chief Operating Officer for Saint Vladimir's Seminary. I remain personally grateful to Fr. Alexander for his faithful and dedicated service as chancellor. I subsequently undertook a careful process of identifying a new chancellor, and with the endorsement of the Metropolitan Council and the

confirmation of the Holy Synod, was pleased to appointed Fr. Alessandro Margheritino as Chancellor effective May 22 of this year. This appointment then necessitated a further search for a secretary and, also with the endorsement of the Metropolitan Council and the confirmation of the Holy Synod, I was likewise pleased to appoint Fr. David Bozeman as the new Secretary for the Orthodox Church in America, beginning on September 1. I look forward to working with my new Officers and the entire staff of the chancery as we move forward.

19.0 *The Labors of the Chancery.* The members of the Metropolitan Council are aware of the process that led to the appointment of a new Chancellor and Secretary.

However, I would like to speak a little more about the great benefit that these appointments have brought to me as the Primate, to my office as a whole, and to the Orthodox Church in America. The past two years have been challenges from the point of view of the administration. The workload at the Chancery has increased, especially since the departure of Fr. Alexander Rentel and for many months, Fr. Alessandro had to bear the weight of filling two full-time positions as Acting Chancellor and Secretary, and then as Chancellor and Acting Secretary. His sacrificial service which is partially reflected in his report to the Metropolitan Council. But I would like to note that his report does not truly reflect the level of commitment and dedication that Fr. Alessandro brings to his position. I am personally grateful for Fr. Alessandro's tireless efforts which reflect his love for the Church and his devotion to the administrative life of the Orthodox Church in America.

20.0 *Chancery challenges.* As he indicated in his report, the addition of Fr. David Bozeman as our new Secretary has eased a lot of the strain of the past months. I would like to formally welcome Fr. David to his first meeting of the Metropolitan Council, and I look forward to his contributions to the work of my office. Fr. David has already dived into the many aspects of the Secretary's position and has helped to bring a renewed energy within the chancery. Neither the reports of the Chancellor or of the Secretary can convey the amount of work that goes on at the Chancery – work that is not simply administrative but work which is above all pastoral, canonical, disciplinary, that is, very heavy for a small staff. I am grateful to our Officers, Fr. Alessandro, Fr. David, and Andrew Smith, our hard-working Treasurer, for the faithful and professional exercise of their ministries on behalf of the Church. I am also thankful for the equally dedicated

labors of the other full-time staff, Fr. John Mikitish and Deacon Alexander Woodill as well as Mat. Jennifer Levine who assists in the office on a part-time basis. As with much of Church life, there is really no such thing as part-time work and I am grateful for the support of everyone. But I say this not simply to offer my personal gratitude but encourage the members of this Metropolitan Council to recognize the tremendous amount of work and service that is being provided by a small group of individuals.

21.0 Departments and Offices. Of course, there are many others who also contribute to these efforts, in the Office of Pastoral Life, in the work of our departments, in communications, and in legal matters. We will hear more about each of these during our meetings this week but I want to note my gratitude to Fr. Nicholas Solak, Fr. Thomas Soroka, Fr. Justin Patterson, Fr. Kyle Parrot and the many others who work with them in fulfilling the Apostolic work of the Church.

22.0 Conclusion. In closing, I wanted to return to Saint Tikhon. Saint Tikhon was a true missionary and because-laborer with Christ in this mission of bringing the lost sheep into the fold. But he labored in a truly humble and deeply Christian manner. Contrasting the aggressive and self-aggrandizing ways of non-Orthodox missionaries, he points out that “Orthodox emissaries, on the other hand, act differently: they go to their holy task not in order that through it they might obtain glory among men, but in order they themselves might reap mercy from God as well as salvation for others. They do not trumpet their success before the whole world, and, indeed, do not ascribe success to themselves but to the power of God.” In another place he would add: “But most importantly, the Orthodox Church accomplishes her [missionary] task in silence, with humility and godliness, with an understanding of human frailty and divine power.”

23.0 I am grateful to all the members of the Metropolitan Council for their contributions to the quiet yet deeply meaningful witness of the Orthodox Church in America.

**METROPOLITAN TIKHON COMPLETE
LOG OF TRAVEL AND ACTIVITIES**
In chronological order by category
Autumn Metropolitan Council Meeting
October 8-9, 2025

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

- 25.03.01: Vespers at Saint John the Theologian in Fairfax
- 25.03.02: Divine Liturgy at Saint John the Theologian in Fairfax
- 25.03.22: Great Vespers at All Saints in Alexandria
- 25.03.23: Divine Liturgy at Saint Mark in Bethesda
- 25.03.30: Divine Liturgy at Saint Luke in McLean
- 25.04.02: Presanctified Liturgy at Saint John the Theologian in Fairfax
- 25.04.06: Divine Liturgy at Saint Nicholas Cathedral
- 25.04.12: Divine Liturgy at Holy Trinity in Ashburn
- 25.04.12: Vigil at Saint Mark in Bethesda
- 25.04.13: Palm Sunday Divine Liturgy at Saint Mark in Bethesda
- 25.04.13: Bridegroom Matins at All Saints in Alexandria
- 25.04.14-16: Bridegroom Matins at Saint Mark in Bethesda
- 25.04.17-20: Holy Thursday-Pascha services at St Nicholas Cathedral
- 25.04.21: Bright Monday at Saint Mark in Bethesda
- 25.04.27: Divine Liturgy at Holy Trinity in Ashburn
- 25.05.04: Divine Liturgy at Holy Trinity in Ashburn
- 25.05.14: Divine Liturgy at All Saints for Midfeast of Pentecost
- 25.06.01: Divine Liturgy at Saint Nicholas Cathedral
- 25.06.07: Vigil for Pentecost at Saint Nicholas Cathedral
- 25.06.08: Divine Liturgy for Pentecost at Saint Nicholas Cathedral
- 25.06.14: Great Vespers for Sunday of All Saints at All Saints in Alexandria
- 25.06.15: Divine Liturgy for Sunday of All Saints at All Saints in Alexandria
- 25.08.10: Divine Liturgy at Saint Nicholas Cathedral
- 25.08.23: Vespers at Christ the Savior in Berlin, MD (25th Anniversary)
- 25.08.24: Divine Liturgy at Christ the Savior in Berlin, MD (25th Anniversary)
- 25.08.31: Divine Liturgy at St Luke in McLean
- 25.08.08: Divine Liturgy at St Matthew in Columbia. Bestowal of Synodal Gramota to Fr Constantine White (40th anniversary of ordination)
- 25.09.20: Vespers at Saint John the Theologian Mission in Fairfax Station
- 25.09.21: Divine Liturgy at Saint John the Theologian Mission in Fairfax Station

B. Archdiocese of Washington Events. *This category records all those events to which the entire diocese was invited to participate. It includes liturgical as well as social events.*

- 25.04.13: Ordination of Deacon Michael Mihailov
- 25.04.26: Annual Bright Saturday Paschal Matins and Liturgy at St Nicholas Cathedral. Awarding of miter to Archpriest Joseph Woodill

- 25.05.09-10: Vespers and Divine Liturgy with rite of consecration for new temple at St Luke in McLean. Awarding of Jeweled Cross to Archpriest John Vitko

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

- 25.03.10: Visit to archdiocesan clergyman in the hospital
- 25.03.12: Meeting with archdiocesan clergyman
- 25.03.23: Meeting with diaconal ordination candidate and wife
- 25.04.08: Meeting with archdiocesan clergyman
- 25.05.08: Meeting with archdiocesan clergyman and wife, archdiocesan deacon, and potential clergyman.
- 25.06.02: Meeting with archdiocesan clergyman
- 25.06.11: Meeting with archdiocesan clergyman
- 25.06.12: Meeting with archdiocesan clergyman
- 25.08.21: Archdiocesan Council meeting
- 25.09.27: Annual Archdiocesan Assembly at Saint Mark's in Bethesda

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

- 25.05.02-03: Symposium in honor of the 10th anniversary of repose of Archimandrite Roman Braga at Holy Dormition Monastery in Rives Junction
- 25.06.18-22: Glorification services for Saint Olga of Kwethluk in Kwethluk and Anchorage, Alaska
- 25.07.07: Retreat for Crossroad Program at SVS
- 25.08.14: Vigil for Dormition at Saint Seraphim Cathedral in Santa Rosa, CA
- 25.08.15: Divine Liturgy for Dormition at Holy Assumption Monastery in Santa Rosa, CA
- 25.08.15-17: Consecration services for Bishop Vasily of San Francisco and the Diocese of the West at Holy Trinity Cathedral in San Francisco
- 25.10.03-04: 100th Anniversary Celebration of Fort Ross, California

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

- 25.02.28: Monthly meeting of the Standing Synod
- 25.03.14: Meeting with member of the Holy Synod
- 25.03.18-20: Spring Holy Synod meeting
- 25.04.28: Special Metropolitan Council meeting
- 25.05.21: Special Metropolitan Council and Holy Synod meetings for confirmation of new Chancellor for the Orthodox Church in America
- 25.05.19: Graduation ceremony for catechist program (DOS/SVS)
- 25.05.28: Molieben of installation for new Chancellor
- 25.06.04: Meeting with OPL. Monthly Standing Synod meeting

- 25.06.17: Special Metropolitan Council and Holy Synod meetings for confirmation of new Secretary for the Orthodox Church in America
- 25.07.12-18: 21st All-American Council in Phoenix, Arizona
- 25.09.25: External Affairs consultation
- *Ongoing*
 - Daily meetings with officers and staff of the Orthodox Church in America

F. Stavropegial Institutions. *As the Metropolitan, I have oversight of the stavropegial institutions, including the monasteries (Saint Tikhon's Monastery, Holy Myrrhbearers Monastery, and the New Skete Monasteries), the seminaries (Saint Tikhon's Seminary and Saint Vladimir's Seminary), and the military and institutional chaplains. Also included in this category is Saint Catherine's Representation Church in Moscow and the various clergy who serve directly under my omophorion but are located in other places (such as OCMC missionaries).*

- 25.03.03-08: First Week of Great Lent at St. Tikhon's Monastery
- 25.03.08: Diaconal ordination at St Tikhon's Monastery
- 25.03.16: SVS Executive Committee meeting
- 25.04.26: SVS Diaconal ordination at St Nicholas Cathedral
- 25.04.29: Special SVS Board meeting
- 25.05.15-16: Full Board Meeting at Saint Vladimir's Seminary
- 25.05.17: Divine Liturgy at Three Hierarchs Chapel and commencement exercises for Saint Vladimir Seminary
- 25.05.23: Meeting of the full Board of Trustees of Saint Tikhon's Seminary
- 25.05.24: Divine Liturgy at Saint Tikhon's Monastery with commencement exercises for Saint Tikhon's Seminary.
- 25.05.25: Divine Liturgy at Saint Tikhon's Monastery.
- 25.05.26: Divine Liturgy at Saint Tikhon's Monastery for Annual Memorial Day Pilgrimage
- 25.08.12: SVS Executive Committee meeting
- 25.09.07-08: Vigil and Liturgy for the Feast of the Nativity of the Theotokos at SVS
- 25.09.09: SVS Executive Committee meeting
- 25.09.11: Meeting with Dean of SVS
- 25.09.14-15: Vigil and Liturgy for the Feast of the Exaltation of the Cross at Saint Tikhon's Monastery and Seminary
 - Ongoing: Ordination interviews

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

- 25.03.09: Sunday of Orthodoxy Vespers at Saint Catherine Greek Orthodox Church in Potomac, MD. Sermon offered by Metropolitan Tikhon
- 25.03.11: Installation of Robert Cardinal McElroy as Roman Catholic Archbishop of Washington
- 25.03.24: Meeting with leadership team from OCF

- 25.04.07: Divine Liturgy at St Nicholas Russian Orthodox Cathedral in New York on the occasion of the 100th anniversary of St Tikhon's repose. Concelebration with Metropolitan Nicholas (ROCOR) and Bishop Matthew (MP).
- 25.09.01-02: Concelebration with Archbishop Stefan of the Macedonian Orthodox Church at Saint Nicholas Cathedral in Washington, DC
- 25.09.10: Meeting of the Executive Committee of the Assembly of Canonical Orthodox Bishops in the United States
- 25.09.16: Dinner at the US State Department in honor of the visit of Patriarch Bartholomew of Constantinople.
- 25.09.16: Doxology at Saint Catherine Greek Orthodox Church in Falls Church, VA, in honor of the visit of Patriarch Bartholomew of Constantinople.

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

- 25.07.01-04: Personal time with family in Columbus, OH •
- 25.07.22-08.08: Summer vacation in French Alps
- Ongoing
 - Hiking 3-4 miles in the morning (4 days/week)
 - Weekly check-in with nutritionist

Report of the Chancellor of the Orthodox Church in America Regular Fall 2025 Session of the Metropolitan Council, October 8-9, 2025

1. Introductory Remarks. I have had the honor of reporting to the Metropolitan Council many times before—first as Acting Secretary, then as Secretary, and most recently as Acting Chancellor and Secretary. Today, however, I report for the first time in my capacity as Chancellor, following my appointment at the end of May of this year.

Of all the years I have served at the Chancery, 2025 has undoubtedly been the most intense, demanding, and, at times, trying. It has been a year of transition and change on many levels. At the Chancery, our limited staff has faced the challenge of balancing special events and major projects alongside the regular demands of daily administration. This year has been marked by moments of profound joy and significance: the canonization of St. Olga of Alaska, the successful convening of the 21st All-American Council, the appointment of new Church Officers, and the concelebration with—and recognition of—a new Autocephalous Orthodox Church. At the same time, we have continued to face important challenges: the relocation of the Chancery, the sale of the Westwood property, the ongoing task of identifying a permanent Chancery home in the Washington, DC area, and the integration within the life of the Archdiocese of Washington.

Through it all, we have much for which to give thanks to our Lord Jesus Christ. What I share in this report is a testimony to the diligent work of the Chancery and the tireless efforts of my colleagues. Though we are a small staff, together we have been able to accomplish much for the life of the Church.

Church administration, when rightly understood, is not merely a matter of management or efficiency, but a form of diakonia—a ministry of service to Christ and His Body. Its purpose is to ensure that the life of the Church unfolds in an orderly, transparent, and accountable manner, so that the Gospel may be proclaimed without hindrance. As St. Paul reminds us, “Let all things be done decently and in order” (1 Corinthians 14:40). Order in the Church is not an end in itself, but a reflection of divine harmony, a sign that our work—even administrative work—can become a vessel of grace when offered in faith and obedience.

2. Chancery Work. The daily work of the Chancellor is, by its nature, broad and demanding. Each day begins with consultation and coordination with His Beatitude Metropolitan Tikhon, ensuring that the pastoral, administrative, and canonical needs of the Church are met in a timely and conscientious way. I meet regularly with Chancery staff members to plan, review, and prioritize projects, and spend much of each day engaged in correspondence and meetings—by phone, video, or in person—with bishops, diocesan chancellors, clergy, and legal or professional advisors. My work involves constant attention to matters concerning the Office for Review of Sexual Misconduct Allegations (ORSMA) and the Sexual Misconduct Policy Advisory Committee (SMPAC); coordination with our General Counsel on ongoing or emerging legal issues; support to dioceses, stavropegial institutions, and parishes; and collaboration with inter-Orthodox and ecumenical counterparts.

Much of this work alternates between regular administration and problem management—a balance of steady routine and fires that need to be put out, as we like to say at the Chancery. It includes oversight of human resources, review of clergy releases and receptions, ordinations, canonical correspondence, and assistance to the Holy Synod and the dioceses in applying established procedures, as well as oversight of

Stavropegial Institutions. The position also carries a particular duty to maintain, preserve, and protect the autocephalous status of the Orthodox Church in America, both by fostering responsible governance within and by representing the Church with clarity and integrity. In all of this, the Chancery functions as a point of unity and coordination, ensuring that the Church's canonical, administrative, and pastoral responsibilities are carried out in accordance with the Statute and in harmony with the vision of His Beatitude.

In a typical year, much of the Chancery's labor consists of essential, behind-the-scenes work that undergirds the life of the Church without which the visible ministry and growth of the Orthodox Church in America could not proceed with stability or order. The daily rhythm of the Chancery includes the release and reception of clergy, drafting and reviewing official texts, writing letters and responses to inquiries, preparing agendas and materials for meetings, and responding to questions and concerns from dioceses, parishes, institutions, monasteries, and faithful across the Church and even beyond it. Since the end of the summer, one of my priorities has been the onboarding of the Secretary into his role and ensuring smooth coordination between our offices. At the same time, I have been settling into my permanent role as Chancellor.

I would like to highlight a few of the many projects that have occupied the Chancery's attention this year. We have assisted the Holy Synod with a cluster of projects related to our liturgical calendar, contributed to the completion of the 2026 desk calendar—now being sent to print, with its thematic focus on growth and renewal—and prepared an updated edition, after five years, of the diptychs of the departed clergy and faithful of the Orthodox Church in America. Attention has also been given to the gradual renewal and replacement of vestry sets in Chancery use, the acquisition and curation of gifts for visits and hospitality on behalf of His Beatitude, and the continued care and distribution of relics and chrism as directed by the Primate. The Chancery is likewise assisting the Holy Synod in the drafting of canonical court procedures. These are but a few examples of the broad range of responsibilities undertaken by our staff.

Beyond these specific projects, the Chancery staff have continued to provide essential archdiocesan support to His Beatitude in his diocesan responsibilities—managing correspondence, scheduling, and event coordination.

3. Activities. In addition to the daily work of administration, 2025 has been a year marked by significant ecclesial events and travels reflecting both the national and international life of the Orthodox Church in America.

On April 7, I participated in the celebration of the Feast of St. Tikhon of Moscow at St. Nicholas Cathedral in New York, presided over by His Beatitude. Later that month, and again in May, I traveled to Rome to represent the Orthodox Church in America, along with His Grace Bishop Andrei, at the funeral of Pope Francis and the installation of Pope Leo.

In May, I also attended the annual Memorial Day Pilgrimage at St. Tikhon's Monastery. The following month, in June, His Beatitude, Deacon Alexander Woodill, and I traveled to Alaska for the canonization of St. Olga of Alaska.

The summer was dominated by the 21st All-American Council, convened in Phoenix, Arizona, in July. This was a significant undertaking for the Chancery, requiring months of preparation and coordination. By every measure, it was a resounding success: as Protodeacon Peter Ilchuk, Council Manager, reports, it was the best-attended Council in decades, conducted smoothly and harmoniously, with no significant issues and a vibrant youth program. I wish to again express my gratitude to the many staff, volunteers, and delegates who contributed to this extraordinary gathering of our Church.

In August, I accompanied His Beatitude for the patronal feast day of Holy Assumption Monastery in Calistoga, California, and for the episcopal ordination of His Grace Bishop Vasily (Permiakov), as Bishop of San Francisco and the West.

On September 2, our office coordinated the concelebration of the Divine Liturgy at St. Nicholas Cathedral in Washington, DC, of Metropolitan Tikhon with His Beatitude Archbishop Stefan, Primate of the Macedonian Orthodox Church. This historic event marked our Church's formal recognition of the Macedonian Orthodox Church and furthered the deepening of fraternal ties between our Churches. In the following weeks, I attended several diocesan assemblies and gatherings, including the Diocese of the West Assembly (immediately following the All-American Council), the ROEA Congress in Chicago, and the Archdiocese of Washington Assembly later in September. These occasions provided opportunities to hear directly from clergy and laity about the life of the Church in their respective dioceses.

During the Feast of the Exaltation of the Cross, I joined His Beatitude at St. Tikhon's Seminary and Monastery, and on September 22, Fr. David, Fr. John Mikitish, and I traveled to New York to spend a day at St. Vladimir's Seminary, where we held meetings with members of the administration and several seminarians.

In September, I also accompanied His Beatitude to a local event held in honor of His All-Holiness Ecumenical Patriarch Bartholomew during his recent visit to the United States. Looking ahead, I anticipate additional travels in the coming months, either accompanying His Beatitude or representing him at various ecclesial and inter-Orthodox gatherings.

4. Westwood St. Sergius Chapel. Over the past several months, I have made several trips to Syosset to oversee ongoing matters related to the Westwood property and St. Sergius Chapel, and I anticipate additional visits in the months ahead. We are actively planning for the orderly disposition of the furnishings and liturgical items. Some archival material still remains on site and will be transferred to St. Vladimir's Seminary in due course, while other materials will either be relocated to Virginia once a permanent Chancery office is secured or placed in temporary storage should the closing of the property contract occur beforehand.

5. Personnel Matters and Transitions. One of the principal reasons this past year has been particularly taxing for the Chancery staff is the reality of operating with very limited personnel. The Chancery has continued to oversee and process the regular administrative workload while simultaneously planning, assisting, and executing major undertakings such as the canonization of St. Olga and the 21st All-American Council. These efforts have demanded an extraordinary level of commitment from a small but deeply dedicated team.

The most significant personnel transition this year has involved the Church Officers. Following my appointment as Chancellor, I continued to hold the title of Secretary for several months, which meant that for a total of eight months in 2025, I effectively carried both positions. The appointment of the new Secretary, Priest David Bozeman, who began his duties on September 1, has restored a much-needed balance within the Chancery. I am deeply grateful to Father David for his professionalism, pastoral approach, wisdom, and excellent contributions in his first weeks. Without question, he has hit the ground running and has already proven himself an excellent fit for the Office.

There have been additional changes in staffing and structure since September—some long in discussion and others newly implemented—reflecting necessary organizational renewal within the Central Administration and its offices and departments. In all cases, those who have served the Church in these capacities have done so with faithfulness and devotion, and we remain deeply grateful for their service. Likewise, we extend our thanks to those who have now stepped forward to continue, strengthen, and expand these ministries as we move ahead.

As previously announced, Mr. Alexis Liberovsky formally retired on September 1, 2025, after more than three decades of faithful service as Archivist of the Orthodox Church in America. At the 21st All-American Council, His Beatitude recognized Alexis's years of dedication with a Primatial Gramota and the honorary title of Archivist Emeritus. Alexis continues to serve as Recording Secretary of the Metropolitan Council and will assist the Office of the Metropolitan with historical projects as needed. With the blessing of His Beatitude, I have asked my colleague Fr. John Mikitish to serve as Archivist Contact responding to archival inquiries received by the Chancery.

On September 1, we also announced the appointment of Archpriest Justin Patterson as Project Manager for the Departments of the Church, succeeding Archpriest Thomas Soroka, who faithfully served in that capacity for over five years. We are sincerely grateful to Father Thomas for his dedication and pastoral oversight during a period of renewal and restructuring, and we welcome Father Justin's leadership as he continues and builds upon that important work.

As part of a broader restructuring of the Office of External Affairs—which His Beatitude will present to the Holy Synod at its November session—Matushka (Dr.) Rebecca Luft has been appointed to represent the Orthodox Church in America in ecumenical settings, including meetings of the World Council of Churches (WCC), the National Council of Churches (NCC), Christian Churches Together (CCT), and other forums. We express our deep gratitude to Archpriest Peter Baktis and Protodeacon Sergei Kapral, who have represented the Orthodox Church in America in these venues for many years with dedication and faithfulness.

The Office of Pastoral Life also continues to expand in its mission and scope. While overseeing multiple programs, the Office strives to operate with a unified vision and structure aligned with the leadership of His Beatitude, the Chancery, and the broader framework of the Church's departments. The most recent development is the reorganization and expansion of the Clergy Wives Ministry under the Office of Pastoral Life. This transition affirms the Church's ongoing commitment to supporting clergy wives and their families and brings the ministry into alignment with the other established programs of the Office. In

this way, the ministry is elevated to a higher and more intentional level, ensuring its continuity and stability for years to come.

Building upon the strong foundation laid by the original committee members (Matushka Valerie Zahirsky, Matushka Alexandra Safchuk, Matushka Jennifer Levine, Matushka Wendy Cwiklinski, Matushka Miho Ealy, and Matushka Lela Powell)—whose dedication, creativity, and advocacy have nurtured the ministry in recent years—the restructured Clergy Wives Ministry will now be guided by a dedicated director, a clergy wife who will receive a stipend and oversee the program’s continued growth and impact.

6. Reflection on Change. Change, especially within the life of the Church, is often difficult to accept and process. This is true not only when we must let go of something we love, but also when we have grown personally and emotionally attached to it. And yet, change is sometimes necessary for the growth of the Church, the fulfillment of the mission entrusted to us by our Lord Jesus Christ, and the sustainability of particular ministries, departments, and offices.

Those who are called to leadership in the Church are entrusted with what might be called the cross of administration—a ministry that demands patience amid conflict, humility in decision-making, and perseverance through criticism or misunderstanding. Leadership entails vision and the courage to implement that vision, even when doing so comes at personal cost. To this end, it is essential to avoid a culture of conflict avoidance. Such an aversion to healthy disagreement and change creates an artificial harmony that ultimately undermines genuine unity and growth.

Needless to say, administration in the Church always entails a pastoral approach. Such a pastoral approach attends faithfully and actively to the work entrusted to one’s care, being neither neglectful nor overly accommodating, but seeking the good of the Church and those it serves in truth and love. No transition or change is ever perfect, nor is it free from missteps. As servants of Christ, we must approach all matters with sensitivity, love, and respect, without losing sight of the fact that the life of the Church must go on. Administrators and leaders are called to a high level of stewardship, where the task is not to yield to uncertainty, hesitancy, or emotional pressure, but to build up the house of the Lord with faith and courage. In every change and challenge, we strive to remember the Apostle’s counsel: “Let all that you do be done in love” (1 Corinthians 16:14).

7. ORSMA & SMPAC. I continue my work with both the Office for Review of Sexual Misconduct Allegations (ORSMA) and the Sexual Misconduct Policy Advisory Committee (SMPAC), serving as Director of ORSMA and working closely with Ms. Cindy Heise, the Office Coordinator. These two bodies remain essential components of the Church’s commitment to safeguarding the faithful and the Church while ensuring transparency and accountability in all matters pertaining to misconduct.

SMPAC holds regular monthly meetings to review policies and compliance issues, to offer guidance and support to dioceses, and—when necessary—to report to the Holy Synod on areas of concern. ORSMA, in turn, meets every other week to review ongoing cases, oversee investigations, consider inquiries from dioceses, and ensure that allegations are handled in accordance with the procedures established by the Holy Synod.

Both SMPAC and ORSMA consistently emphasize the importance of every parish and diocese taking seriously the policies and standards established by the Holy Synod and complying fully with all mandated requirements. In cases of uncertainty or doubt, clergy or lay leaders should promptly reach out to either office or to the Chancery for clarification. In the event of an allegation, it is imperative that it be reported immediately, in full accordance with our established procedures and policies.

8. Conclusions. I conclude this report, as always, with a word of sincere gratitude to His Beatitude Metropolitan Tikhon, for his ever patient and pastoral leadership, and to the members of the Holy Synod of Bishops for their ongoing trust and support. I am likewise profoundly grateful to my fellow Officers and to the Chancery staff for their tireless and dedicated work.

The past year has demanded much of everyone—long hours, flexibility, and perseverance—but our small team has responded with remarkable professionalism, faith, and love for the Church.

I am also thankful to the members of the Metropolitan Council for their continued trust, support, and counsel, and for their attentive participation in the governance of our autocephalous Church.

The work of administration and leadership is not about control or achievement, but about stewardship: caring for what has been given, building up the Body of Christ, and ensuring that our common life is worthy of the Gospel.



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

September 30, 2025

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

Since our last report, the Pension Board was reconstituted through elections at the 21st All-American Council held in Phoenix. Leaving the Board were Frs. Matthew Tate and Justin Griffing, Matushka Mary Buletza-Breton (Chair), and Mary Ann Bobulsky. Subsequently, Frs. David Garretson and Eric Tosi, and Matushka Tamara Patterson and Ivan Rudolph-Shabinsky were elected to the Board. Mitred Archpriest John Dresko was elected as Chair and Melanie Ringa as Secretary.

Investment Performance

The Pension Plan assets remain invested in a diversified portfolio of equities, fixed income, and alternative investments. Continued improvement of cash flow means the monthly contributions exceed the monthly benefits payable. From January through August 2025, we have been able to add \$360k to our investment account and anticipate a full year's investment of \$560k. Please refer to the cash flow detail schedule.

The marketable securities portfolio, including the low volatility portion, managed by Morgan Stanley, earned 5.8%, net of fees for the YTD ending August 31, 2025. This compares to 10.6% earned for the same period by our relative benchmark representative of an asset allocation of 60% global equities, 35% intermediate bonds, and 5% cash. The S&P 500 Index earned 10.8% vs. the S&P 500 equally weighted performance of 8.7% for the same period, thus showing the effect of the "Magnificent Seven" on the cap weighted stock market indices.

The performance of non-marketable alternative investments is subject to delayed reporting of 1 to 5 months and therefore their recent performance is not yet reflected in the above Plan's total performance. Because of this, the Plan's performance is best evaluated over a longer period of time. These investments produced an average net return of 8.1% per year during the 3-year period ending August 31, 2025.

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

Total Plan assets as of August 31, 2025 were \$28,284,524.

Participation

As of December 31, 2024, there were 392 active participating members (including 48 members who participate via more than one employer) and 14 inactive members for a total of 406

active/inactive participants. In addition, there are currently 243 total monthly benefits recipients. (Some recipients may be sharing one deceased member's benefit, as in the case of children sharing a father's benefit.)

On January 1, 2025, all eligible "OCA employees" were to have become participants in the Plan. By September 1, 2025, active participants increased to 418 (including 52 members who participate via more than one employer).

Additionally, the amendment mandating parishes to contribute the employer 14% portion to the Plan monthly if they have inactive members, ineligible members, and/or non-compliant members became effective January 1, 2025 for the parish employer portion. On September 1, 2024, there were 306 active parishes contributing to the Plan. As of September 1, 2025, 372 parishes are enrolled in the system and remitting or preparing to remit the parish portion.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] The Plan

states:

ARTICLE NINE

9.3 Authority and Responsibilities of the Pension Board

*(a) Subject to the limitations of the Plan, the Pension Board from time to time shall establish rules for the administration of the Plan and the transaction of its business. **The Pension Board shall have full discretionary authority and responsibility for administration of the Plan and shall be responsible for the interpretation of the Plan. The determination of the Pension Board as to any disputed question shall be conclusive.***

The Diocese of Alaska. The Plan Amendment (Section 1.16) created a narrow exception for clergy in Alaska. The exception does not apply to:

- Clergy who were already members as of April 2, 2024.
- Clergy/parishes/dioceses with an agreement of participation.
- Misinterpretation: Some councils have treated this as a blanket exemption.
- Correct Application: Participating parishes must continue if they hire new clergy or eligible lay employees.
- The amendment's intent was to accommodate very small/unpaid parishes, not remove Alaska wholesale.
- **This has been removed as a concern** due to continued conversation and clarification between Michael and the diocesan authorities since the drafting of this report.

Actuarial Valuation

Our actuarial firm Gabriel, Roeder, Smith & Company (GRS) prepared a valuation report for the Plan as of January 1, 2025. Although we are not where we want to be from an actuarial standpoint, we continue to make progress.

Actual funded ratio went from 38.1% in 2023 to 40.4% in 2024 to 42.9% in 2025 to (projected) 45.3% in 2026.

Projected funded ratio went from 66.1% in 2023 to 74.1% in 2024 to 79.6% in 2025 to

(projected) 82.7% in 2026. Actuarial projection is fully funded in 2037 (100%) without any other net additions; sooner if we grow membership.

Funding shortfall improved 6.5% of pay, from 14.1% of pay in 2023 to 7.6% of pay in 2025 (almost half!)

Additional employer contributions of 14% of compensation are now being received for each inactive, ineligible, and non-compliant member. [REDACTED]

78 new or returning members were added to the Plan, reducing the Recommended Contribution 3.8% of pay.

Non-investment cash flow (contributions minus benefit payments and expenses) improved from (\$1,559,000) in 2022 to (\$758,200) in 2023 to \$77,100 in 2024 (i.e., negative to positive cash flow).

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

Agreed-Upon Procedures

Barnes Wendling CPAs, the Pension Plan's independent accounting firm, has been engaged to perform an Agreed-Upon Procedures (AUP) engagement for 2025 at the same fee charged for the 2023 report.

Administration

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

Michael has updated the MARC system for all new participants and parishes onboarding January 1, 2025. We appreciate the assistance from the Dioceses and cooperation from the parishes which has allowed us to make the progress indicated. **As a reminder, any member can text the office or text the Pension Administrator Michael Stieglitz directly at 516-464-0415.**

Proposed Plan Amendments

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

Specific requests for the Metropolitan Council

The Pension Board makes a request to the Metropolitan Council for renewal of the Plan Sponsor contribution of \$9,000/mo. (\$108k annually) for 2026.

Additional information provided:

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

- A. Gabriel, Roeder, Smith & Company - Actuaries. No new exhibits at this time.
- B. Barnes Wendling CPAs. No new exhibits at this time.
- C. Cash flow
- D. "Dashboard" of funding and membership
- E. Administrative expenses detail: Unaudited actual 2024 vs. budget, and 2023-2021 actual.
- F. Participation statistics
- G. April 2, 2024 amendment to the Plan

Conclusion

We appreciate the time and energy everyone has contributed towards the progress which we have made. We pray that the Lord bless our combined continued efforts at providing some financial stability for our laborers who are blessed enough to retire. Please keep us in your prayers.

Respectfully yours in Christ, The Pension Board

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

Archpriest John Dresko, Chair
Archpriest David Garretson
Archpriest Eric Tosi
Melanie Ringa
Matushka Tamara Patterson
Ivan Rudolph-Shabinsky

**THE ORTHODOX CHURCH IN AMERICA
FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023**

Draft 9-2-25

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Draft 9-2-25

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
The Orthodox Church in America

Opinion

We have audited the accompanying financial statements of The Orthodox Church in America (a nonprofit organization), which comprise the statements of financial position as of December 31, 2024 and 2023, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of The Orthodox Church in America as of December 31, 2024 and 2023, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of The Orthodox Church in America and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

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

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about The Orthodox Church in America's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements, including omissions, are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of The Orthodox Church in America's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about The Orthodox Church in America's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Satty, Levine & Ciacco, CPAs, P.C.
Melville, New York
August 22, 2025

Draft 9-2-25

**THE ORTHODOX CHURCH IN AMERICA
STATEMENTS OF FINANCIAL POSITION
DECEMBER 31, 2024 AND 2023**

	2024	2023
ASSETS:		
Cash and cash equivalents	\$ 2,543,294	\$ 1,461,879
Restricted cash	499,975	499,975
Investments:		
Endowment pool fund	2,814,940	2,001,332
St. Andrew endowment fund	195,586	151,730
FOS endowment fund	233,944	148,241
Missions endowment fund	1,704,860	1,287,168
Annuity and unitrust fund	66,914	119,376
	<u>5,016,244</u>	<u>3,707,847</u>
Accounts receivable, net	117,906	165,462
Note receivable	150,000	150,000
Prepaid expenses	64,745	10,000
Property and equipment, net	137,366	159,017
Security deposits	8,930	8,930
Right of use asset - office lease	94,568	160,976
	<u>8,633,028</u>	<u>6,324,086</u>
TOTAL ASSETS	\$ 8,633,028	\$ 6,324,086
LIABILITIES AND NET ASSETS:		
LIABILITIES:		
Accounts payable and accrued expenses	\$ 114,597	\$ 142,931
Lease liability - office lease	95,583	162,997
Deferred revenue	30,851	-
Annuity and unitrust agreements	904	77,144
	<u>241,935</u>	<u>383,072</u>
TOTAL LIABILITIES	241,935	383,072
NET ASSETS:		
Without donor restrictions		
Undesignated	1,521,412	1,408,472
Invested in property and equipment	137,366	159,017
	<u>1,658,778</u>	<u>1,567,489</u>
Total without donor restrictions	1,658,778	1,567,489
With donor restrictions	6,732,315	4,373,525
	<u>8,391,093</u>	<u>5,941,014</u>
TOTAL NET ASSETS	8,391,093	5,941,014
TOTAL LIABILITIES AND NET ASSETS	\$ 8,633,028	\$ 6,324,086

The accompanying notes are an integral part of these financial statements.

THE ORTHODOX CHURCH IN AMERICA
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED DECEMBER 31, 2024

	Without Donor Restrictions	With Donor Restrictions	Total
OPERATING SUPPORT, REVENUES AND RECLASSIFICATIONS			
Support:			
Diocesan contributions	\$ 1,886,902	\$ -	\$ 1,886,902
General contributions	443,819	1,484,004	1,927,823.00
Total support	2,330,721	1,484,004	3,814,725
Revenues:			
Interest and dividends	37,719	83,631	121,350
Investment income, net	5,821	1,096,367	1,102,188
Other revenue	97,721	-	97,721
Total revenues	141,261	1,179,998	1,321,259
Reclassifications:			
Net assets released from restrictions	359,779	(359,779)	-
Total operating support, revenue and reclassifications	2,831,761	2,304,223	5,135,984
EXPENSES:			
Program services	928,435	-	928,435
General and administrative	1,785,041	-	1,785,041
Development	26,996	-	26,996
Total expenses	2,740,472	-	2,740,472
Change in net assets from operations	91,289	2,304,223	2,395,512
Nonoperating activities			
Change in actuarial value of annuities and unitrusts	-	76,240	76,240
Investment income, net	-	(21,673)	(21,673)
Total operating activities	-	54,567	54,567
Change in net assets	91,289	2,358,790	2,450,079
Net assets at beginning of year	1,567,489	4,373,525	5,941,014
Net assets at end of year	\$ 1,658,778	\$ 6,732,315	\$ 8,391,093

The accompanying notes are an integral part of these financial statements.

THE ORTHODOX CHURCH IN AMERICA
STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED DECEMBER 31, 2023

	Without Donor Restrictions	With Donor Restrictions	Total
OPERATING SUPPORT, REVENUES AND RECLASSIFICATIONS			
Support:			
Diocesan contributions	\$ 1,718,073	\$ -	\$ 1,718,073
General contributions	55,081	665,803	720,884
Total support	1,773,154	665,803	2,438,957
Revenues:			
Interest and dividends	8,419	76,013	84,432
Investment income, net	927	659,955	660,882
Other revenue	7,289	-	7,289
Total revenues	16,635	735,968	752,603
Reclassifications:			
Net assets released from restrictions	490,705	(490,705)	-
Total operating support, revenue and reclassifications	2,280,494	911,066	3,191,560
Expenses:			
Program services	956,089	-	956,089
General and administrative	1,626,123	-	1,626,123
Development	28,878	-	28,878
Total expenses	2,611,090	-	2,611,090
Change in net assets from operations	(330,596)	911,066	580,470
Nonoperating activities			
Change in actuarial value of annuities and unitrusts	-	4,963	4,963
Investment income, net	-	(470)	(470)
Total operating activities	-	4,493	4,493
Change in net assets	(330,596)	915,559	584,963
Net assets at beginning of year	1,898,085	3,457,966	5,356,051
Net assets at end of year	\$ 1,567,489	\$ 4,373,525	\$ 5,941,014

The accompanying notes are an integral part of these financial statements.

**THE ORTHODOX CHURCH IN AMERICA
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2024**

	<u>Program Services</u>	<u>Management and General</u>	<u>Fundraising</u>	<u>Total</u>
EXPENSES:				
Salaries, wages and benefits	\$ 539,812	\$ 935,227	\$ -	\$ 1,475,039
Transportation, travel, meals and related expenses	140,557	94,106	-	234,663
Professional fees and other outside services	16,611	291,391	11,714	319,716
Scholarships, grants and other assistance	148,159	36,358	-	184,517
Equipment, supplies and other religious materials	14,989	19,835	-	34,824
Rent	-	110,493	-	110,493
Repairs and maintenance	-	30,210	-	30,210
Utilities	-	27,650	-	27,650
Telephone	-	13,569	15,242	28,811
Advertising	-	2,020	-	2,020
Insurance	-	23,819	-	23,819
Printing, postage and delivery services	1,756	8,593	-	10,349
Dues, fee and subscriptions	15,503	6,912	40	22,455
Conferences and meetings	49,263	971	-	50,234
Bank charges	172	6,804	-	6,976
Depreciation expense	-	21,652	-	21,652
Facility payment in lieu of taxes	-	43,669	-	43,669
Pension plan administrative support	-	108,000	-	108,000
Miscellaneous	1,613	535	-	2,148
Payroll processing fees	-	3,227	-	3,227
TOTAL EXPENSES	<u>\$ 928,435</u>	<u>\$ 1,785,041</u>	<u>\$ 26,996</u>	<u>\$ 2,740,472</u>

The accompanying notes are an integral part of these financial statements.

**THE ORTHODOX CHURCH IN AMERICA
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2023**

	<u>Program Services</u>	<u>Management and General</u>	<u>Fundraising</u>	<u>Total</u>
EXPENSES:				
Salaries, wages and benefits	\$ 393,358	\$ 925,131	\$ -	\$ 1,318,489
Transportation, travel, meals and related expenses	134,939	88,881	-	223,820
Professional fees and other outside services	140,106	173,523	9,963	323,592
Scholarships, grants and other assistance	154,961	23,000	-	177,961
Equipment, supplies and other religious materials	11,296	9,184	170	20,650
Rent	1,016	109,465	-	110,481
Repairs and maintenance	4,606	21,848	-	26,454
Utilities	2,650	25,109	-	27,759
Telephone	1,005	12,880	16,990	30,875
Insurance	-	37,925	-	37,925
Printing, postage and delivery services	1,258	7,157	1,755	10,170
Dues, fee and subscriptions	33,051	2,177	-	35,228
Conferences and meetings	77,808	159	-	77,967
Bank charges	35	4,989	-	5,024
Depreciation expense	-	29,108	-	29,108
Facility payment in lieu of taxes	-	43,027	-	43,027
Pension plan administrative support	-	108,000	-	108,000
Miscellaneous	-	1,227	-	1,227
Payroll processing fees	-	3,333	-	3,333
TOTAL EXPENSES	<u>\$ 956,089</u>	<u>\$ 1,626,123</u>	<u>\$ 28,878</u>	<u>\$ 2,611,090</u>

The accompanying notes are an integral part of these financial statements.

THE ORTHODOX CHURCH IN AMERICA
STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED DECEMBER 31, 2024 AND 2023

	<u>2024</u>	<u>2023</u>
<u>CASH FLOWS FROM OPERATING ACTIVITIES:</u>		
Change in net assets	\$ 2,450,079	\$ 584,963
Adjustments to reconcile change in net assets to net cash (used in) provided by operating activities:		
Depreciation expense	21,652	29,108
Amortization of right of use asset - office lease	66,408	91,158
Loss on archives project	-	104,068
Net (appreciation) in fair market value of investments	(1,178,147)	(681,087)
Net change in actuarial value of annuities and unitrusts	(76,240)	(4,963)
(Increase) decrease in:		
Accounts receivable	47,555	(28,499)
Prepaid expenses	(54,745)	(10,000)
Increase (decrease) in:		
Accounts payable and accrued expenses	(28,334)	58,476
Lease liability - office lease	(67,414)	(90,143)
Deferred revenue	30,851	-
TOTAL ADJUSTMENTS	<u>(1,238,414)</u>	<u>(531,882)</u>
Net cash provided by operating activities	<u>1,211,665</u>	<u>53,081</u>
<u>CASH FLOWS FROM INVESTING ACTIVITIES:</u>		
Proceeds from sale of investments	328,363	407,250
Purchase of investments	(458,613)	(458,711)
Net cash (used in) investing activities	<u>(130,250)</u>	<u>(51,461)</u>
Net (decrease) in cash and restricted cash	1,081,415	1,620
Cash and restricted cash - beginning of year	<u>1,961,854</u>	<u>1,960,234</u>
Cash and restricted cash - end of year	<u>\$ 3,043,269</u>	<u>\$ 1,961,854</u>

The accompanying notes are an integral part of these financial statements.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 1. ORGANIZATION AND BASIS OF ACCOUNTING AND PRESENTATION

A. ORGANIZATION

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

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

B. BASIS OF ACCOUNTING

The financial statements of the Church have been prepared on the accrual basis of accounting and, accordingly, reflect all significant receivables, payables and other liabilities.

C. BASIS OF PRESENTATION

The financial statements of The Orthodox Church in America have been prepared in accordance with U.S. generally accepted accounting principles ("US GAAP"), which require The Orthodox Church in America to report information regarding its financial position and activities according to the following net asset classifications:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Church. These net assets may be used at the discretion of The Orthodox Church in America's management and the board of directors.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of The Orthodox Church in America or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities.

D. MEASURE OF OPERATIONS

The statements of activities report all changes in net assets, including changes in net assets from operating and nonoperating activities. Operating activities consist of those items attributable to The Orthodox Church in America's ongoing services and interest and dividends earned on investments. Nonoperating activities are limited to resources that generate return from investments and other activities considered to be of a more unusual or nonrecurring nature.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A. CASH AND CASH EQUIVALENTS

The Church considers all highly liquid investments with an original maturity of three months or less when purchased to be cash equivalents.

B. INVESTMENTS

Investments are reported at cost, if purchased, or at fair value, if donated. Thereafter, investments are reported at their fair values in the statements of financial position, and changes in fair value are reported as investment return in the statements of activities. Purchases and sales of securities are reflected on a trade-date basis. Gains and losses on sales of securities are based on average cost and are recorded in the statements of activities in the period in which the securities are sold. Interest is recorded when earned. Dividends are accrued as of the ex-dividend date.

C. FAIR VALUE MEASUREMENTS

Fair value is defined as the price that would be received to sell an asset in the principal or most advantageous market for the asset in an orderly transaction between market participants on the measurement date. Fair value should be based on the assumptions market participants would use when pricing an asset. US GAAP establishes a fair value hierarchy that prioritizes investments based on those assumptions. The fair value hierarchy gives the highest priority to quoted prices in active markets (observable inputs) and the lowest priority to an entity's assumptions (unobservable inputs). The Church groups assets at fair value in three levels, based on the markets in which the assets and liabilities are traded and the reliability of the assumptions used to determine fair value. These levels are:

Level 1: Unadjusted quoted market prices for identical assets and liabilities in active markets as of the measurement date.

Level 2: Other observable inputs, either directly or indirectly, including:

- Quoted prices for similar assets and liabilities in active markets.
- Quoted prices for identical or similar assets or liabilities in markets that are not active.
- Inputs other than quoted prices that are observable for the asset/liability.
- Inputs that are derived principally from, or corroborated by, other observable market data.

Level 3: Unobservable inputs that cannot be corroborated by observable market data.

D. ACCOUNTS RECEIVABLE AND ALLOWANCE FOR CREDIT LOSSES

Accounts receivable are stated at the amount management expects to collect from outstanding balances. Management provides for probable uncollectible amounts through a provision for bad debt expense and an adjustment to the valuation allowance based on its assessment of the current status of individual accounts. Balances that are still outstanding after management has used reasonable collection efforts are written off through a charge to the valuation allowance and a credit to accounts receivable. Management has determined that no allowance is needed at December 31, 2024 and 2023.

E. PROPERTY AND EQUIPMENT

Building and equipment are stated at cost or at their estimated fair market value if donated. Costs in excess of \$3,000 and the value of donated property and equipment are capitalized. Depreciation is provided on the straight-line method over the estimated useful life of the asset. The estimated useful lives of assets are as follows:

Building and improvements	5-40 years
Furniture, fixtures and equipment	5-7 years
Auto and truck	3-10 years
Software	5-7 years

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

F. ENDOWMENT INVESTMENT AND SPENDING POLICIES

The Church maintains master investment accounts for its donor-restricted endowments. Realized and unrealized gains and losses from securities in the master investment accounts are allocated quarterly to the individual endowments based on the relationship of the market value of each endowment to the total market value of the master investment accounts, as adjusted for additions to or deductions from those accounts. In classifying such funds for financial statement purposes as either net assets with donor restrictions or net assets without donor restrictions, the Board of Trustees looks to the explicit directions of the donor where applicable and the provisions of the laws of the State of New York. The Trustees have determined that, absent donor stipulations to the contrary, the provisions of New York State law do not impose either a permanent or temporary restriction on the income or capital appreciation derived from the original gift.

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

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

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

G. CONTRIBUTIONS AND DIOCESAN ASSESSMENTS

Contributions received are recorded as net assets without donor restrictions or net assets with donor restrictions, depending on the existence and/or nature of any donor-imposed restrictions. Contributions that are restricted by the donor are reported as an increase in net assets without donor restrictions if the restriction expires in the reporting period in which the contribution is recognized. All other donor restricted contributions are reported as an increase in net assets with donor restrictions, depending on the nature of restriction. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions.

Contributed property and equipment are recorded at fair value at the date of donation. Contributions with donor-imposed stipulations regarding how long the contributed assets must be used are recorded as net assets with donor restrictions; otherwise, the contributions are recorded as net assets without donor restrictions.

Diocesan contributions or assessments are recorded as revenue in the year the dioceses are assessed. Such revenue is calculated and assessed based upon an approved percentage of each diocese's budget.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

H. CONTRIBUTED SERVICES

Contributed services are recognized as contributions at their estimated fair value in accordance with the Financial Accounting Standards Board authoritative guidance on *Accounting for Contributions Received and Contributions Made*, if the services (a) create or enhance nonfinancial assets or (b) require specialized skills, are performed by people with those skills and would otherwise be purchased.

For the years ended December 31, 2024 and 2023, The Orthodox Church in America the Church did not receive any donated professional services.

I. FUNCTIONAL EXPENSE ALLOCATION

The costs of providing program and other activities have been summarized on a functional basis in the statements of activities and functional expenses. Expenses which are easily and directly associated with a particular program or supporting service are charged directly to that functional area. Certain other expenses have been allocated among the program and supporting services benefited. Such allocations are determined by management on an equitable basis.

The expenses that are allocated include the following:

Expense	Method of Allocation
Salaries, wages and benefits	Time and effort
Transportation, travel, meals and related expenses	Actual or time and effort
Professional fees and other outside services	Actual or time and effort
Scholarship, grants and other assistance	Actual
Other	Actual, square footage or time and effort

J. USE OF ESTIMATES

Management uses estimates and assumptions in preparing financial statements. Those estimates and assumptions affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities, and the reported revenues and expenses. On an ongoing basis, management evaluates the estimates and assumptions based on new information. Management believes that the estimates and assumptions are reasonable in the circumstances; however, actual results could differ from those estimates.

K. IMPAIRMENT LOSSES

Management reviews property and equipment for impairment whenever events or changes in circumstances indicate that the carrying value of the asset may not be recoverable. Impairment is measured at the amount by which the carrying value exceeds the asset's fair value. If the asset is determined to be impaired, an impairment loss is recognized as a non-operating expense (non-cash) in the year the impairment was determined. There were no impairment losses recognized during the years ended December 31, 2024 and 2023.

L. INCOME TAXES

The Church is exempt from federal income taxes under section 501(c)(3) of the Internal Revenue Code and comparable New York State law. Contributions to it are tax deductible within the limitations prescribed by the code.

The most significant tax positions of the Church are its assertion that it is exempt from income taxes and its determination of whether any amounts are subject to unrelated business tax. All significant tax positions have been considered by management. It has been determined that it is more likely than not that all tax positions would be sustained upon examination by taxing authorities.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (continued)

M. RECLASSIFICATION

Certain amounts in the prior year's financial statements have been reclassified to conform to the current year's presentation.

N. ANNUITY AGREEMENTS

The Church established gift annuities whereby donors may contribute assets in exchange for the right to receive an annual return during their lifetime. This transaction provides for a portion of the transfer to be considered a charitable contribution for income tax purposes. The difference between the amount of the annuity and the liability for future payments, determined on an actuarial basis, is recognized as income at the date of gift. The actuarial liability for annuities payable is evaluated annually (giving effect to investment income and payments to annuitants) and any surplus or deficiency is recognized as change in actuarial value of annuities and unitrusts in the statements of activities. Assets held for annuities payable totaled \$0 at December 31, 2024 (\$54,567 in 2023). The present value of the remaining future liability to be distributed by the Church amounted to \$0 in 2024 and \$42,762 in 2023.

O. UNITRUST AGREEMENTS

The Church is named as beneficiary of various charitable remainder unitrusts and acts as the trustee. These agreements provide for the payment of lifetime distributions to the grantor or other designated beneficiaries. Upon receipt of these agreements, the actuarially determined present value of future payments is recorded as a liability. The remaining portion of the trust attributable to the Church's future interest is recorded in the statements of activities as contributions with donor restrictions in the period received. On an annual basis, the present value of the remaining future liability is revalued based upon actuarial assumptions. Assets held in the charitable remainder unitrusts totaled \$66,914 at December 31, 2024 (\$64,810 at December 31, 2023). The present value of the remaining future liability to be distributed by the Church is calculated using various rates and applicable mortality tables and totaled \$904 at December 31, 2024 (\$34,382 at December 31, 2023).

P. RIGHT OF USE LEASED ASSETS AND LIABILITIES

Right to use leased assets and the related liabilities are recognized at the lease commencement date and represent the our right to use an underlying asset and lease obligations for the lease term. Right to use leased assets are measured at the initial value of the lease liability plus any payments made to the lessor before the commencement of the lease term, less any lease incentives received from the lessor at or before the commencement of the lease term, plus any initial direct costs necessary to place the lease asset into service. Right to use leased assets are amortized over the shorter of the lease term or the useful life of the underlying asset using the straight-line method. The amortization period varies among the leases.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 3. AVAILABILITY AND LIQUIDITY

The following represents The Orthodox Church in America's financial assets at December 31, 2024 and 2023:

	<u>2024</u>	<u>2023</u>
Financial assets at year end:		
Cash and cash equivalents	\$ 2,543,294	\$ 1,461,879
Restricted cash	499,975	499,975
Investments	5,016,244	3,707,847
Accounts receivable, net	117,906	165,462
Total financial assets	<u>8,177,419</u>	<u>5,835,163</u>
Less amounts not available to be used within one year:		
Net assets with donor restrictions	<u>6,732,315</u>	<u>4,373,525</u>
Financial assets available to meet general expenditures over the next twelve months	<u>\$ 1,445,104</u>	<u>\$ 1,461,638</u>

The Church's goal is generally to maintain financial assets to meet the general operating expenses.

NOTE 4. RESTRICTED CASH

The cash is restricted for the purpose of the thriving in ministry initiative grant. Restricted cash at December 31, 2024 and 2023 consisted of the following:

	<u>2024</u>	<u>2023</u>
Restricted cash - Thriving in ministry program	<u>\$ 499,975</u>	<u>\$ 499,975</u>

NOTE 5. INVESTMENTS

Investments are reported at fair value in accordance with authoritative guidance issued by the Financial Accounting Standards Board on *Accounting for Certain Investments Held by Not-for-Profit Organizations*. Fair value is determined by using quoted market prices, where available. When quoted market prices are not available, the present value of estimated or expected future cash flows or another reasonable method is used.

Investments as of December 31, 2024 and 2023 are summarized as follows:

	<u>2024</u>	<u>2023</u>
Corporate equity securities	\$ 4,442,985	\$ 3,104,139
Money market funds	484,539	462,354
Fixed income securities	88,720	29,762
Mutual funds	-	57,025
Annuity investments	-	54,567
	<u>\$ 5,016,244</u>	<u>\$ 3,707,847</u>

At December 31, 2024 and 2023, all investments were considered level 1 investments, except for the annuity investments which were considered level 2 investments.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 6. PROPERTY AND EQUIPMENT

Property and equipment at December 31, 2024 and 2023 consisted of the following:

	<u>2024</u>	<u>2023</u>
Land (non-depreciable)	\$ 45,000	\$ 45,000
Building and improvements	570,508	570,508
Furniture, fixtures and equipment	161,508	161,508
Total property and equipment	<u>777,016</u>	<u>777,016</u>
Less: Accumulated depreciation	<u>(639,650)</u>	<u>(617,999)</u>
Property and equipment, net	<u>\$ 137,366</u>	<u>\$ 159,017</u>

NOTE 7. EMPLOYEE BENEFIT PLANS

PENSION PLANS:

The Orthodox Church in America sponsors The Orthodox Church in America Pension Plan (the “Plan”). Substantially all full-time employees of the Church and organizations under its jurisdiction participate in the Plan. The Plan, which is administered by the pension board of the Church, is a contributory plan, and provides defined benefits based on years of service and remuneration near retirement.

Eligible employees are all full-time employees and some part-time employees of the Church or organizations under the Church’s jurisdiction, except for employees that are older than age 60 at the time of employment. Bishops and priests become members of the Plan on the first day of the month after they begin service with the Church. Full-time employees are eligible to participate in the Plan on the first day of the month after their date of hire. Participants with five years of services are entitled to pension benefits upon retirement. Pension benefits are provided to participants under several types of retirement arrangements based upon initial participation date, years of service and age. Retirement benefits are paid to pensioners or beneficiaries in various forms of joint and survivor annuities, including a lump-sum payment option. Pension expense, representing the Church's required contribution to the Plan, was \$118,751 in 2024 and \$88,630 in 2023. The contribution made by the Church represented approximately 2.3% and 2.1%, respectively, of the total contributions made to the Plan for each of the years ended December 31, 2024 and 2023. To the extent the Plan is underfunded, The Church and organizations under its jurisdiction may bear risk and future contributions to the Plan may increase.

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

The following table discloses the name and funded status of the Plan as of January 1, 2025 and 2024 (the date of the latest actuarial valuation), inclusive of the fair value of plan assets as of December 31, 2024 and 2023:

<u>The Orthodox Church in America Pension Plan (Plan EIN: 06-1455789)</u>	<u>Actuarial present value of accumulated plan benefits</u>	<u>Fair value of plan assets</u>	<u>Total net contributions</u>	<u>Funded Status</u>
2024	\$ 62,102,134	\$ 26,648,556	\$ 5,143,970	42.91%
2023	\$ 60,974,031	\$ 24,659,254	\$ 4,146,115	40.44%

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 7. EMPLOYEE BENEFIT PLANS (continued)

OTHER RETIREMENT BENEFITS:

In 2007, the Church entered into an agreement with a former employee whereby the Church agreed to make monthly payments of \$950 to the former employee in lieu of retirement benefits from the separate Orthodox Church in American Pension Plan. The agreement existed to rectify a situation whereby the former employee had been improperly excluded from participation in the Orthodox Church in America Pension Plan, and continued until the former employee's death in May of 2022. Payments related to this agreement amounted to \$4,750 for the year ended December 31, 2023.

NOTE 8. NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions are restricted for the following purposes:

Net assets with donor restrictions, time and purposes were available for the following purposes as of December 31, 2024 and 2023:

	2023	Additions/ Investment Activities	Release	2024
Mission churches	\$ 1,298,839	\$ 417,691	\$ 38,965	\$ 1,677,565
Thriving in ministries	500,000	-	137,730	362,270
Economic challenges	42,373	1,250,000	61,706	1,230,667
Archives fund	45,510	-	6,150	39,360
Restricted endowments				
excess earnings	731,791	573,836	30,656	1,274,971
General purpose endowment				
excess earnings	333,816	221,427	17,511	537,732
Charity	69,601	-	679	68,922
Theological education -				
academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Seminary appeal	-	-	-	-
Mission planting	140,717	81,300	65,035	156,982
Youth director	46,303	1,000	-	47,303
St. Catherine's (Iconostasis)	-	-	-	-
Other	4,101	101,704	1,347	104,458
	<u>\$ 3,301,907</u>	<u>\$ 2,646,958</u>	<u>\$ 359,779</u>	<u>5,589,086</u>
Donor restricted endowment funds				
General purposes				250,364
Restricted purposes				826,855
Charitable remainder unitrust				<u>66,010</u>
Total net assets with donor restrictions				<u>\$ 6,732,315</u>

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 8. NET ASSETS WITH DONOR RESTRICTIONS (continued)

	2022	Additions/ Investment Activities	Release	2023
Mission churches	\$ 1,077,264	\$ 253,893	\$ 32,318	\$ 1,298,839
Thriving in ministries	102,291	500,000	102,291	500,000
Economic challenges	-	50,000	7,627	42,373
Archives fund	101,473	-	55,963	45,510
Restricted endowments				
excess earnings	409,671	346,954	24,834	731,791
General purpose endowment				
excess earnings	212,920	134,662	13,766	333,816
Charity	69,601	-	-	69,601
Theological education -				
academic fellowship	59,300	-	-	59,300
Publication reserve fund	29,556	-	-	29,556
Seminary appeal	5,638	2,803	8,441	-
Mission planting	139,384	112,000	110,667	140,717
Youth director	45,303	1,000	-	46,303
St. Catherine's (Iconostasis)	120,000	-	120,000	-
Other	18,899	-	14,798	4,101
	<u>\$ 2,391,300</u>	<u>\$ 1,401,312</u>	<u>\$ 490,705</u>	<u>3,301,907</u>
Donor restricted endowment funds				
General purposes				251,010
Restricted purposes				790,262
Charitable remainder unitrust				<u>30,346</u>
Total net assets with donor restrictions				<u>\$ 4,373,525</u>

NOTE 9. ENDOWMENTS

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

The Church classifies as donor-restricted net assets (a) the original value of gifts donated to the donor-restricted endowment, (b) the original value of subsequent gifts to the donor-restricted endowment, and (c) accumulations to the endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The remaining portion of the donor-restricted endowment fund is classified as donor-restricted net assets until those amounts are appropriated for expenditure by the Church. The Church considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

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

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 9. ENDOWMENTS (continued)

From time to time, the fair value of assets associated with individual donor-restricted endowment funds may fall below the level that the donor or endowment agreement requires the Church to retain as a fund of perpetual duration. In accordance with GAAP, deficiencies of this nature would be reported in net assets without donor restrictions and that future gains be allocated to net assets without donor restrictions until such losses have been restored.

The following represents a detail of the donor-restricted endowment net asset composition:

	With Purpose Restrictions	To be Held in Perpetuity	Total
Donor restricted endowments for 2024:			
General purposes	\$ 537,732	\$ 250,364	\$ 788,096
Restricted purposes	1,274,971	826,855	2,101,826
Total endowment funds	<u>\$ 1,812,703</u>	<u>\$ 1,077,219</u>	<u>\$ 2,889,922</u>
Endowment net assets, January 1, 2024	<u>\$ 1,065,607</u>	<u>\$ 1,041,272</u>	<u>\$ 2,106,879</u>
Investment return:			
Interest and dividend income, net of fees	50,602	-	50,602
Realized and unrealized gains	696,494	(646)	695,848
Total investment return	747,096	(646)	746,450
Contributions	-	36,593	36,593
Endowment net assets, December 31, 2024	<u>\$ 1,812,703</u>	<u>\$ 1,077,219</u>	<u>\$ 2,889,922</u>
Donor restricted endowments for 2023:			
General purposes	\$ 333,816	\$ 251,010	\$ 584,826
Restricted purposes	731,791	790,262	1,522,053
Total endowment funds	<u>\$ 1,065,607</u>	<u>\$ 1,041,272</u>	<u>\$ 2,106,879</u>
Endowment net assets, January 1, 2023	<u>\$ 622,591</u>	<u>\$ 1,038,273</u>	<u>\$ 1,660,864</u>
Investment return:			
Interest and dividend income, net of fees	47,792	-	47,792
Realized and unrealized gains	395,224	-	395,224
Total investment return	443,016	-	443,016
Contributions	-	2,999	2,999
Endowment net assets, December 31, 2023	<u>\$ 1,065,607</u>	<u>\$ 1,041,272</u>	<u>\$ 2,106,879</u>

NOTE 10. OPERATING LEASES

The Church evaluated current leases to determine which met the criteria of a lease. The right-of-use (ROU) asset represents the Church's right to use the underlying asset for the lease term, and the lease liability represent the Church's obligation to make lease payments arising from this lease. The ROU asset and lease liability, which arise from an operating lease, were calculated based on the present value of future lease payments over the lease terms. The Church has made an accounting policy election to use a risk-free rate in lieu of its incremental borrowing rate to discount future lease payments. The weighted-average discount rate applied to calculate lease liabilities as of December 31, 2024, was 2.40%.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 10. OPERATING LEASES (continued)

The Church's main operating lease is for its Chancery office. This lease expires June 30, 2025. The Church also has an operating lease for an apartment occupied by the Metropolitan. This lease expires May 31, 2025 and has been renewed until May 31, 2026. The leases generally contain renewal options for periods ranging up to 5 years. Rental expense for these leases was \$110,493 and \$110,481 for the years ending December 31, 2024 and 2023, respectively.

Cash paid for the operating leases for the year ended December 31, 2024 was \$110,616. There were no noncash investing and financing transactions related to leasing.

The right-of-use asset and corresponding liability associated with future lease payments at December 31, 2024 are shown below:

Right-of-use assets	\$ 328,350
Amortization	(233,782)
Right-of-use assets, net	<u>\$ 94,568</u>
Lease liability	<u>\$ 95,583</u>
<u>Weighted average:</u>	
Discount rate	2.40%
Remaining lease term (years)	0.71

Future maturities of lease liabilities under these operating leases are as follows:

<u>December 31,</u>	
2025	\$ 78,251
2026	18,250
Total lease payments	96,501
Less: Present value discount	(918)
Present value of lease liability	<u>\$ 95,583</u>

NOTE 11. RELATED PARTY TRANSACTIONS

Note receivable consists of a \$150,000 promissory note from the Orthodox Church Capital Improvement Fund. The original Promissory Note was dated May 21, 2018, with interest payable at 2.75%. The note called for monthly interest only payments of \$344 for 59 months commencing December 20, 2018 with a balloon payment of the principal balance of \$150,000 due December 20, 2023. The new Promissory Note is dated November 15, 2023, with interest payable at 4%. The note calls for ten semi-annual payments of interest only in the amount of \$3,000 commencing May 15, 2024 with a balloon payment of the principal balance of \$150,000 due November 15, 2028.

THE ORTHODOX CHURCH IN AMERICA
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2024 AND 2023

NOTE 12. CONTINGENCIES

The New York Child Victims Act (the “Act”) took effect August 14, 2019 and extended the statute of limitations for those who may wish to bring civil claims alleging sexual abuse. As of the expiration of the revival window, which was August 14, 2021, the Church has been named as a defendant in a single lawsuit alleging such conduct. This lawsuit is currently ongoing and it is not feasible to predict the ultimate outcome. Accordingly, no liability has been recorded related to this matter. The Church will continue to negotiate in good faith with the other parties; however the Church is prepared to proceed to trial if settlement discussions are not successful.

The Church, in the normal course of its operations, is a party to various legal proceedings and complaints, some of which are covered by insurance. While it is not feasible to predict the ultimate outcomes of such matters, management of the Church is not aware of any claims or contingencies, which are not covered by insurance that would have a material adverse effect on the Church’s financial position, changes in net assets or cash flows.

NOTE 13. CONCENTRATION OF CREDIT RISK

The Church maintains all of its cash, cash equivalents and investments in high credit quality financial institutions. Accounts at the institutions are either insured by the Federal Depository Insurance Corporation (“FDIC”) or the Securities Investor Protection Corporation (“SIPC”). The FDIC insured limit for the years ended December 31, 2024 and 2023 was \$250,000. The SIPC insured limit for the years ended December 31, 2024 and 2023 was \$500,000. At December 31, 2024 and 2023, the Church had assets that were in excess of the FDIC limit by \$2,793,269 and \$1,709,571, respectively, and assets that were in excess of the SIPC limit by \$4,516,244 and \$3,153,278, respectively.

The Church’s revenues are primarily from Diocesan contributions, general support and investment income.

NOTE 14. SALE OF WESTWOOD LOCATION

The Church entered into an agreement dated March 5, 2024, whereby the Church agreed to sell to the Purchaser the property located at 6850 Northern Boulevard in Oyster Bay Cove, NY, together with the buildings and all improvements located thereon, for a purchase price of \$4,250,000. In addition, the Purchaser agreed to pay the Church \$50,000 per year to defer the Church’s costs in maintaining the property commencing June 1, 2024. These payments are not to be applied to the purchase price and have been included in other income on the accompanying statement of activities for the year ended December 31, 2024. The closing of the sale is expected to take place in Spring of 2026.

NOTE 15. SUBSEQUENT EVENTS

The Church has evaluated events and transactions that occurred through August 22, 2025, which is the date the financial statements were available to be issued, for possible disclosure and recognition in the financial statements.

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

Introduction

I am honored to present the post AAC Council Managers report for the 21st All American Council. Overall, it was a tremendous success and despite the regular comments and concerns about the heat in July in Phoenix, everyone seemed to be pleased with the council and the resort facilities where the Council took place. In spite of the criticisms, this was the most well attended Council in recent years.

Preconciliar Commission

The Preconciliar Commission once again successfully completed its work in regard to the agenda and schedule and for the first time in recent years, we were either on time or ahead of schedule throughout the week for the sessions and business of the Council. Fr. Andrew Jarmus and Hollie Benton, Council's co-chairs did a wonderful job keeping the agenda moving and allowing ample time for delegates to express their opinions and have their voices heard. This was the first time that we had two individuals serve as consecutive Council Co-Chairs.

Local Committee

I also applaud the work of Dn. John Weiss and Lydia Osolinsky who chaired the local committee. It is not an easy task to coordinate everything on the ground and with so many moving parts, it can be easy to fall off track. They did a wonderful job, and I appreciate their hard work in this area.

There were some challenges with some of the local chairs of the subcommittees and additional people were needed to supplement some of their work. This is something we should look at in the future as proper local assistance is getting more difficult to secure.

General Updates

As I mentioned, the Council was an overall success operationally. In looking at some figures, we had about 620 delegates, 167 Observers, and almost 200 youth participants. Again, this is one of the highest councils for attendance in recent years.

The hotel did a wonderful job working with us and the team that was assigned to us were very professional and was able to respond to any last-minute changes or issues that came up from our side as they always do.

Despite concerns about the high temperatures, we only had 1 minor medical event with one individual throughout the week of the council and again the hotel staff and emergency responders took care of the individual and no further attention was needed.

From my understanding, we have once again come in either on budget and under budget with a surplus that we would possibly use to supplement the next All-American Council. Andrew Smith can provide more details in his financial report.

One of the most important aspects of my role as Council Manager is to foster a good working relationship with the hotel, the vendors, and the local committee. This tremendously helps when trying to work within budget for things that might not necessarily be within our budget. We are a very unique group in which we require a lot of things to make the Council a success that would normally come with a high cost, however, with these relationships, we are able to achieve our goals efficiently.

Conclusion

As many of you know, the site and dates for the 22nd All American Council has been selected, and work will begin on that Council next year.

Over the past few years. The convention and conference industry has seen a tremendous amount of growth and demand as we enter the post-covid era. Hotels are still in recovery mode and are expected to continue operating in that mindset for the foreseeable future.

What does that mean for us? Traditionally we begin planning the next All-American Council at the conclusion of the previous Council. Due to these new circumstances within the hotel industry, we need to start council planning sooner.

We have signed the contract with the Hyatt Regency Dallas at Reunion Tower for the 22nd All American Council.

Some highlights of the hotel contract are:

- 22nd All American Council Dates: Monday, July 24th to Friday, July 28th, 2028.
- Room rate will be 189.00++, Staff Rate will be 139.00 (Available 3 days pre/post)
- Reduced daily parking of \$15.00 down from \$30.00
- City of Dallas Incentive: \$10.00 per room night actualized. Potential of 27,000.00 credit to the master account.

Once again, I would like to thank His Beatitude Metropolitan Tikhon, and the members of the Metropolitan Council for their continued prayers, guidance, and support in my role as our Council Manager.

Respectfully Submitted,

Pdn. Peter Ilchuk, Council Manager

OCA Departments: Report for the Metropolitan Council Archpriest Justin Patterson, Project Manager for the Departments

Background

Late this summer, I was tapped by the central administration to succeed Archpriest Thomas Soroka as Project Manager for OCA Departments. Since September 1, 2025, I have worked intensely to understand the history, challenges, and opportunities facing the five departments I have been entrusted with overseeing as PM.

The fractional Project Manager position was pioneered creatively by my predecessor Fr. Thomas Soroka back in 2020 when he both crafted and assumed this position. The PM was to oversee a “reboot” of the departments – not as institutions, as such– but as specific projects or ministry efforts that would operate under the umbrella of the old departments. The job of the PM would be to vet, suggest, and coordinate projects that could engage workers and volunteers intensely for a brief period, but then release them after project completion.

As I understand it, my tasks as PM are to:

1. To **seek out, commission, vet, curate, and share a wealth of ministry resources for our parishes** to be made available for free on our OCA website.
2. To **facilitate workshops and educational events** around the OCA to support healthy parish life (in church music, in evangelism and church planting, in Christian education and formation, in youth and campus ministry, etc.)
3. To **celebrate, highlight, and make accessible to all parishes the good ministry efforts happening across the OCA** – through the website, social media, and various information platforms.

Department of Liturgical Music & Translations:

The DLM is inarguably our most consistently productive and institutionally-supported of our OCA’s departments. The DLM’s work is coordinated by the PM in consultation with an episcopal liaison from the Holy Synod, His Grace Bishop Benedict of New England. Leading day-to-day work of the DLM with fractional positions are the respected maestro Vlad Morosan and Priest Philip Ritchey, who are project leads for musical notation and liturgical texts, respectively. Additionally, Vlad coordinates the work of a number of contract workers whose main task is to set hymnography into standard musical notation.

Some key projects that have been undertaken recently and that we plan to continue: .

- Continuous production of high-quality texts and musical settings (often in two versions – both “Thou” and “You.”)
- Musical & directing workshops & online DLM enrichment courses
- Church Musician Sunday (1st Sunday in October)

Department of Evangelization

There is much that can be said about the history and future of this department. However, two projects have dominated the departmental efforts of my predecessor, Fr. Thomas:

- The awarding and rethinking of the Church Planting Grants
- The production of and expansion of “on demand” evangelization pamphlets

In my first month on the job, conversations on and review of the applications for this year’s Church Planting Grant program have dominated my time also – as there was the immediate need to share out grant applications, then review carefully and identify parishes that the chancery and I recommend be awarded grants. (See appendix for our recommendations.)

The church planting grant program has indeed been a “crown jewel” of our Department for decades. My intention as PM remains to preserve the grant program and improve it. At the same time, there have also been requests for parallel grants for communities that do not quite “fit” the carefully defined church planting grant requirements: consider parishes with bi-vocational clergy, or parishes in Mexico or Canada, or older parishes able to present a renewed vision/ plan for revitalization. One aim in this coming year is to strengthen the church planting grant program and present a parallel plan (or two) to the chancery and ultimately to the Church at-large.

The Department of Evangelization has been and must be a visionary department of our OCA. I am very excited about fleshing out that vision with the chancery and proposing a number of promising projects for 2026 and beyond.

Department of Christian Education:

Over the past few years, the focus of DCE has been two-fold:

- Developing the **new Essential Orthodox Christian Beliefs** (adult series) and
- Developing **new curriculum for children at various age levels** that tracks with the EOCB program.

I am pleased to report that the first effort is completed and that the second (for children) is mostly finished – and awaits a modest amount of funding so that we might call it “complete.” I recommend completing the new curriculum. I will explore restoring older legacy open-source resources and incorporating all DCE resources neatly into a more navigable space. My hope would also be to propose a couple of projects geared towards Adult Christian Education and Formation – which is critical both in terms of integrating converts and nourishing the faith of our long-time OCA faithful.

Department of Youth, Young Adults, & Campus Ministry:

Where are we today? It is fair to acknowledge that the world of youth ministry/young adult ministry/campus ministry has changed significantly in the past decade. And the OCA is not the only jurisdiction struggling to chart the best course forward for youth and young adult ministry. I have been having and will continue to have conversations with Orthodox Christians outside our OCA organization, and at the jurisdictional departmental offices about all these questions – and look forward to further reflection and recommendations in the future.

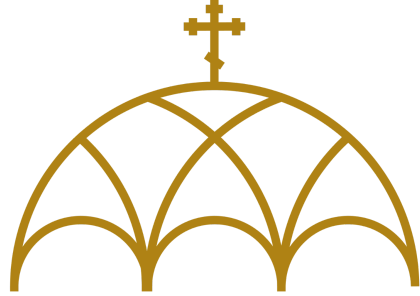
Department of Christian Service & Humanitarian Aid

There is simply *nothing* to report.

Concluding Thoughts

I deeply appreciate the work of those who have come before me and remain grateful to His Beatitude for this chance to serve our beloved OCA in this new way.

While there is neither space (in this written report) nor time (in my limited 15-minute oral report to the MC) to unpack a collaborative vision for our departmental work, I look forward to honing that vision and fleshing it out in collaboration with His Beatitude, the chancery staff, and with you all as clergy and lay leaders from across the OCA. We will have to think outside the box in the years to come and I welcome your input as we try to undertake efforts that can truly support the work of our parishes and create essential resources for clergy and faithful laboring heroically “in the trenches” of parish ministry.



Office of Pastoral Life

— ORTHODOX CHURCH IN AMERICA —



Clergy Wives



FINANCIAL HEALTH INITIATIVE
for OCA Clergy Families



Thriving in Ministry



Synaxis



Office of Pastoral Life

Metropolitan Council Report – October 2025

The Office of Pastoral Life (OPL) continues to build on the momentum of the past year, strengthening its programs and broadening support for clergy and clergy families across the Orthodox Church in America. Key areas since our last meeting include fundraising, the successful completion of the first Financial Health Initiative (FHI) cohort, growth in Thriving in Ministry (TiM), organizational changes in the Clergy Wives Ministry, and preparations for our 2026 in-person retreats.

Fundraising and Development

Fundraising efforts in the Office of Pastoral Life are focused not only on meeting the matching requirements of our Lilly Endowment grants but also on financially supporting the broader operation of the Office—including programs that fall outside of grant funding.

Over the past year, we have been putting in place donor tools and building the fundraising infrastructure that will position us to raise funds more effectively in the years ahead. This includes developing systems for donor cultivation, strengthening communication tools, and aligning our messaging across all OPL programs. We are hopeful to bring on a part-time fundraiser in January to provide dedicated leadership and coordination in this area. In addition, we are looking to grow our team of networkers and collaborators who can reach into the field and connect us with potential donors.

At the diocesan level, we have received good support and continue to engage with diocesan councils and hierarchs to strengthen their partnership with our work. Alongside diocesan engagement, we are cultivating relationships with individual donors, foundations, and other partners who share a commitment to clergy vitality. Looking further ahead, we hold aspirational and longer-term goals of establishing planned giving opportunities to sustain the Office's work well into the future.

Financial Health Initiative (FHI) – Cohort One

The inaugural FHI cohort has now completed its three-month program, involving thirty clergy families selected by their bishops and chancellors. Participants engaged in:

- The Ramsey SmartDollar financial wellness program
- Personal financial coaching provided through SmartDollar
- An array of practical tools, such as a budgeting app, retirement planning resources, and other supports for financial stewardship

The FHI Fund opened in September, allowing eligible participants to apply for \$5,000 in debt relief or a \$5,000 retirement contribution. To date, 18 program participants have received a total of \$100,000 in distributed FHI funds. These funds are making a direct and immediate impact on the financial health of our clergy families, confirming both the urgent need and the tangible benefit of this initiative.

Looking ahead, FHI Cohort Two will open to broader applications in 2026, alongside the launch of the Clergy Children Scholarship Fund, which will provide \$1,500 awards for dependent children of Orthodox Church in America priests enrolled in post-secondary education (college or trade school).

This theme of parish and household financial practices was also the focus of our September Synaxis, which brought together over 80 clergy for a meaningful and productive conversation. The discussion was well received, long-awaited, and welcomed as an opportunity for clergy to speak candidly about financial realities in their ministries and homes.

Thriving in Ministry (TiM)

Our Thriving in Ministry program is thriving. Originally scaled for 20 groups, we rescaled for 30 groups and currently have 29 active groups with the expectation of 36 groups by year's end. Two measures are being taken to adjust to this growth:

- Rescaling the program again to 35 groups.
- Initiating a process of "graduating" groups that have been active for five years or longer.

Graduating long-standing groups will allow newer groups to enter the program in the coming years, ensuring continued growth and sustainability. Thriving in Ministry is proving to be a vital resource for priests and priest wives in these changing days, offering them space to reflect, connect, and strengthen their ministries.

Clergy Wives Ministry (CWM)

The Clergy Wives Ministry is undergoing an important organizational change. The faithful service and work of the volunteer committee that has nurtured the Clergy Wives Ministry in recent years is being transitioned to a program lead. This change will align the Clergy Wives Ministry with other OPL programs, strengthen its structure, and provide long-term sustainability.

The Office of Pastoral Life expresses deep gratitude to Matushka Valerie Zahirsky, Matushka Alexandra Safchuk, Matushka Jennifer Levine, Matushka Wendy Cwiklinski, Matushka Miho Ealy, and Matushka Lela Powell for their dedicated work, vision, and commitment in establishing and sustaining this important effort.

2026 In-Person Retreats

Planning is underway for two major in-person retreats in 2026:

- National Clergy Retreat (September 28 – October 1, 2026, at the University of Saint Mary of the Lake Conference Center, Mundelein, Illinois) – bringing together clergy from across the OCA for renewal, formation, and brotherhood.
- Clergy Wives Retreat (Spring 2026, St. Tikhon's Monastery, Pennsylvania) – the first in-person gathering of its kind for clergy wives, designed to strengthen their spiritual lives, connections, and resilience.

Both retreats are being developed with significant input from participants and leadership. They represent a milestone in OPL's commitment to offering high-quality, in-person formation opportunities on a national scale.

The Listening Project

At the Office of Pastoral Life, we are also organizing a new research initiative called the *Listening Project*, designed to study the lived experience of OCA parish priests, particularly in their early and middle years of ministry. A significant number of priests will participate through surveys and in-depth interviews, to reach 75 participants. The project is gathering data on vocational expectations, vocational strain, emotional and spiritual well-being, family impact, social support, and markers of thriving. Using confidential transcripts and thematic analysis, the findings will provide valuable insight into the pressures and opportunities of pastoral life. This extended listening will not only guide the refinement of OPL programs but also help the wider Church enter into more intentional, prayerful conversations about clergy vitality and thriving. We expect findings from this Listening Project will be reported in 2026.

Concluding Reflection

Beyond the programs and fundraising described here, the deeper work of the Office of Pastoral Life is to create space in the Church where the realities of clergy life can be named and addressed together. Leadership, in this sense, means drawing the Church's attention to the challenges our clergy face and mobilizing multiple voices in conversation about what thriving truly means.

The Metropolitan Council is a natural setting for this kind of extended, prayerful conversation. By attending to the data we have gathered, reflecting on the strains clergy families carry, and discerning together what health and flourishing look like, the Council itself can help shape the conditions in which our clergy thrive — and in which the whole Church is renewed.

Respectfully submitted,



Archpriest Nicholas J. Solak

Director, Office of Pastoral Life

The Orthodox Church in America
Metropolitan Council

Property Committee Update

12 September 2025

Your Beatitude, Reverend Fathers, Brothers and Sisters in Christ,
Most Blessed Master, bless!

Background

Last March 2024, The Orthodox Church in America (OCA) executed our contract for the sale of the Westwood property with our buyer (Kochar). Closure on the property is projected to occur on or about April 1st, 2026, or thirty days past Village approval of the subdivision plan.

Earlier this year, the buyer missed a milestone deadline for approval of the subdivision plan resulting in an extension request which we subsequently approved this past March. The extension amendment certified the expectation that bi-annual payment of earnest monies (\$50,000 per year) will continue as scheduled until closure occurs.

Current Buyer Activity

- Buyer’s second plan submission to the Village of Oyster Bay Cove occurred on April 18, 2025, and included two critical documents: a 3-sheet set of plans, and a full Environmental Assessment Form (EAF).
- There has been significant exchange of comments between the Village and Buyer’s engineers in the form of question and response.
- Topics of current discussion include submission of a Stormwater Pollution Prevention Plan, soil sampling information adequate to determine the design of the on-site drainage and sanitary sewage disposal systems for each lot, and acknowledgement of Village Code 283-22F requiring a 20-foot-wide area be provided adjacent to a traffic artery.
- Next steps will include Village of Oyster Bay Cove preliminary approval of submitted subdivision plan which will trigger a public comment period.
- Final approval for the sale of Westwood is subject to review by the New York Attorney General. Initial steps by our New York legal team have been initiated to address this requirement and expedite Westwood’s sale without delay.

[REDACTED]

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

Requesting Your Beatitude’s Blessing!

Respectfully Submitted:

Gregory Honshul, Chairperson

Report of the Secretary of the Orthodox Church in America
Regular Fall 2025 Session of the Metropolitan Council
October 8-9, 2025

OVERVIEW. On September 1, 2025, I began working in the OCA Chancery office as the Secretary of the Orthodox Church in America. This followed a relatively quick but smooth transition away from parish ministry at St. John of Damascus Orthodox Church in Tyler, TX in the Diocese of the South and a relocation to Springfield, VA for my wife, Matushka Amy (Prisca) and myself. In the short time that I have been working in this new capacity, I have been able to observe the day-to-day operations of the chancery office, make several visits to OCA institutions, attend the Archdiocese of Washington D.C. Annual Diocesan Assembly, and attend several local parishes. This report is a reflection on some of my initial observations of the chancery, its functions and operations, and how I have taken up my responsibilities as the Secretary of the OCA.

PHYSICAL OFFICE MANAGEMENT. In previous reports, Fr. Alessandro Margheritino, in his capacity as Secretary, highlighted the ongoing transition of the chancery offices from Syosset, NY to Springfield, VA. The current chancery is functioning well with all necessary operations being covered by a small but effective team. I traveled to New York in September with our Chancellor, Fr. Alessandro along with Fr. John Mikitish to check on the Westwood property and assess the state of things. While a large portion of the archives have been successfully relocated to St. Vladimir's Seminary, there remains a substantial number of documents and miscellany to be inspected and dealt with. The more substantial issue, from my observation, will be the final disposition of all the furniture, office equipment, and household items which have been allowed to accumulate on the property. It will require a significant amount of time and effort to entirely complete the exodus from the Westwood property. Concrete plans for storage of items that will eventually be used in the new chancery location still have to be made.

The identification of a permanent chancery and all that will be involved in the purchase, set-up, and occupation of the new space is a preeminent concern. Establishing a permanent presence here in the Washington D.C. metropolis will provide clarity and purpose for the OCA and end this time of transition. I hope to assist in this significant work.

ARCHIVES. As noted, most of the Archival collection is now housed in the Rangos Building at St. Vladimir's Seminary. As of the end of September, Alex Liberovsky, the Archivist Emeritus, has removed all personal files and belongings from the Westwood property. A substantial number of items in the basement will not be preserved in the Archives and must be disposed of as soon as possible.

INFORMATION TECHNOLOGY. I have had fruitful introductory conversations with the OCA Tech Manager, Fr. John Schroedel, as well as interactions with the Director of Communications, Fr. Kyle Parrott. Matushka Brenda Mikitish provided several hours of training on our database, Airtable, as well as additional training on BOX. These are impressive and highly useful tools in administering and

managing OCA files and communications. Considering the amount of archival material that the OCA generates and must manage, these systems are necessary for the operation of the Church.

SMPAC. The Sexual Misconduct Policy Advisory Committee serves in an advisory role, offering guidance on enhancing the content and effectiveness of the Policies, Standards, and Procedures on Sexual Misconduct. It also reviews the implementation of the Church's PSPs and ensures compliance with these policies. One of the Secretary's main responsibilities is managing compliance for Chancery clergy and staff along with Stavropegial Institutions. I am pleased to report that amongst these groups, we have nearly 100% Compliance.

The current members of SMPAC are Archpriest Alessandro Margheritino, Chancellor; Priest David Bozeman, Secretary; Archpriest David Mezynski; Archpriest Justin Patterson; Protodeacon Peter Danilchick; Deacon Ken Liu, Mr. Robert Koory, Esq., Cindy Heise, and Allison Nix.

COMMUNICATION & PUBLICATIONS. Fr. Kyle Parrott, Director of Communication, will outline the status of our social media platforms and website. As a relevant topic, I will mention that I have been directed to initiate a review of the "OCA Social Media Guidelines for Clergy and Lay Leaders." We are establishing a small committee to review the document and offer suggestions to help clarify and strengthen our guidelines. The ambiguity between personal opinions and representative remarks has led to confusion and scandal at times. It is our hope that a review of the guidelines will bring a certain amount of clarity and help OCA clergy and lay leaders avoid contentious practices.

OPERATIONS. The Office of the Secretary oversees several important ongoing tasks in which I am actively involved. I manage the 501(c)(3) master list and assist various parishes with their tax-exempt status, oversee the insurance needs of the Orthodox Church in America, maintain the Church's documents and database, provide support to the Holy Synod, and serve in an advisory role to the Metropolitan as an officer of the Church.

I have also been involved in some of the operations of the Archdiocese of Washington D.C. as a support to His Beatitude as the Chancery continues to integrate locally. Communicating with diocesan priests, providing direction for background checks and record keeping, and attending the annual Diocesan Assembly have all been a good introduction to the overall operation of the Archdiocese. I anticipate that this will continue as the Archdiocese becomes more acclimated to the presence of the Metropolitan and the Chancery office.

TRAVEL. In September, as part of my onboarding at the Chancery, I was given the opportunity to travel with His Beatitude to St. Tikhon's Orthodox Theological Seminary along with our Chancellor, Fr. Alessandro, for the Feast of the Exaltation of the Precious and Life-giving Cross. It was a good opportunity to meet the seminarians, celebrate the Feast, and be introduced to the monastery community. The following week, as I mentioned, I made the trip to New York for a visit to St. Vladimir's Orthodox Theological Seminary along with Fr. Alessandro and Fr. John Mikitish. We had several meetings with seminarians which involved fruitful discussions covering a number of topics including

personal histories, anticipated ordinations, and potential ministry placements. At both institutions we also had time for good conversations with Fr. John Parker and Dr. Ionuț-Alexandru Tudorie, Deans of St. Tikhon's and St. Vladimir's Seminaries, respectively.

I anticipate traveling with His Beatitude to the Annual Fort Ross Orthodox Pilgrimage in Jenner, CA at the beginning of October. This will be a historic pan-Orthodox concelebration, marking the 100th anniversary of the pilgrimage.

FINAL REMARKS. Taking on this position has involved a steep learning curve and while I am still getting a "feel" for the operations of the Chancery, I am impressed by the competency and care that the current officers and leadership have shown in their administration of the Church. There are no obvious operational deficiencies that I can see but I as I become more familiar with the Chancery office, I hope to make meaningful contributions and further refine the good work that is being done.

Respectfully submitted,

Priest David Bozeman
Secretary of the Orthodox Church in America

Orthodox Church in America

Treasurer's Report

Metropolitan Council – Fall 2025

Your Beatitude, Reverend Fathers, Brothers and Sisters:

Greetings in Christ!

I write this as we conclude the third quarter of the 2025 fiscal year. Since the last meeting of the Metropolitan Council, the most significant activity for the finance office has consisted in our providing financial and operational support for the All-American Council (AAC) in Pheonix, AZ and offering an accounting to AAC delegates of the OCA's financial position over the three-year period preceding the Council. At the AAC, we also established the funding mechanism of the Central Administration of the OCA for the next three years, provided financial reports for the OCA's stavropegial institutions, and received updates on such matters as the Office of Pastoral Life and the OCA Pension Plan.

Below, I build upon the work of the AAC in providing recent financial performance of the OCA and proposing a budget for 2026.

FY2024 Audited Financial Statements

During the spring and summer of 2025, OCA and Chazin staff worked closely with Satty, Levine and Ciacco, CPAs, P.C. to conduct the field work for the external audit of the OCA's 2024 financial statements. Audit fieldwork has been completed and a draft of the financial statements is available (see **Attachment A**). The auditors have issued an Unqualified (i.e., "clean") opinion on this draft of the OCA's 2024 financial statements; the statements "...present fairly, in all material respects, the financial position of The Orthodox Church in America as of December 31, 2024 and 2023..."

In 2024, the OCA saw a \$91,289 increase in *unrestricted* net assets, which can be thought of as our operating net income. We also recognized revenue associated with the significant Economic Challenges Facing Pastoral Leaders Lilly grant (\$1.25 million) in 2024, and we saw a \$1.3 million increase in endowment investments, resulting in a significant increase in *restricted* net assets.

Upon Metropolitan Council approval, we will be able to sign the management representation letter and issue final audited statements for 2024. (See accompanying resolution)

FY2025 Financial Performance through June 30, 2025

Attachment B is the quarterly Treasurer's Report through June 30, 2025.

Revenue collection was \$1.48M, including 50% of our full annual endowment draw and use of restricted funds for 2025, as well as anticipated releases from grant funds, on an annual budget of \$3,209K (46.16%). Diocesan contributions were at 51.14% of budget. Expenses incurred through Q2 2025 were \$1.38M on an annual budget of \$3,209K (43.02%). This resulted in unrestricted net income of roughly \$100K through Q2 2025.

It's important to note that this net income includes \$257K in "Other" income, most of which pertains to the federal Earnings Retention Tax Credit program for pandemic relief (i.e., one-time revenue which won't have a corollary in 2026 and following).

OCA investments have performed well in 2025, with a blended return of 5.45% for the first two quarters of 2025 and over 19% for the 12-month period ending 6/30/2025, both of which exceeded the S&P 500 for the same periods. These investments are associated with endowed funds that, because of healthy investment gains in prior years, have remained and are now well "above water" (i.e., the investment balances have not fallen below the permanently restricted portion of the endowments).

	Market Val.	Market Val.	Market Val.	6 mo. Rate	Annual Rate
Investment Accounts	6/30/2024	12/31/2024	6/30/2025	of Return	of Return
Main Endowment Fund, incl Rotko	2,408,956.95	2,814,940.46	3,096,633.98	10.01%	28.55%
FOS Endowment Fund	213,408.59	233,943.51	243,259.07	3.98%	13.99%
St. Andrew Endowment Fund	180,014.62	195,586.25	194,147.76	-0.74%	7.85%
	2,802,380.16	3,244,470.22	3,534,040.81	8.93%	26.11%
Kavalenko	64,280.32	66,913.99	69,784.78	4.29%	8.56%
OCCIF N/R (Mission Fund)	150,000.00	150,000.00	150,000.00	0.00%	0.00%
Missions Fund	1,545,395.26	1,704,859.84	1,694,038.68	-0.63%	9.62%
	1,695,395.26	1,854,859.84	1,844,038.68	-0.58%	8.77%
	4,562,055.74	5,166,244.05	5,447,864.27	5.45%	19.42%
Note:	Main Endowment Q4 2024 and Q2 2025 balances include \$150,000 stock gift received Aug. 2024				

All-American Council

We continue to process transactions associated with the AAC, so the results are preliminary. Currently, we show a \$58K surplus for the Council; however, a portion of this was budgeted to cover the Council Manager stipend for the three-year period between now and the next Council, so we will likely end with a surplus around \$20K. I plan to provide a fuller accounting of the AAC at a future meeting.

FY2025 Budget

Attachment C is the proposed budget for FY2026. Please note that this is preliminary and, if needed, I will return to the Metropolitan Council in the spring with proposed amendments to the budget in light of additional information (e.g., adopted diocesan budgets) that may become available in the final months of the calendar year. Overall, the budget is consistent with prior years, but includes the following changes:

- Modest (3%) anticipated overall growth in diocesan budget assumptions, to which the 34% contribution rate established by the All-American Council is applied in most cases.
- A proposed increase of the endowment and quasi-endowment spending rate from 3% to 5% (see accompanying resolution).
- Use of unrestricted reserve to substantively cover the OCA's contribution to the two Lilly grant programs (\$77,250) and the pension administration contribution (\$108,000).
- 3% cost-of-living increase for all salaried employees.
- Reduction of Archives and Property Support budgets in accordance with adjusted anticipated needs for 2026.
- Continued inclusion of the expanded Office of Pastoral Life, with Lilly grant funded programs shown on a second summary tab (p. 2) rather than consolidated with OCA operating activity (p.1).

Respectfully Submitted,

Andrew Smith
Treasurer



ORTHODOX CHURCH in AMERICA

Treasurer's Report

June 30, 2025

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

Greetings in Christ!

What follows is a set of internal financial statements that has been compiled with preliminary financial data through the second quarter of fiscal year 2025.

Included in this Treasurer's Report for the period ended June 30, 2025 are the following:

- * Statement of Operating Activity - Consolidated
- * Statement of Operating Activity - OPL Lilly Program Activity
- * Comparative Balance Sheet for June 30, 2025 and December 31, 2024

June 30, 2025 represents two quarters of the OCA's fiscal year, so the target for operating revenues and expenses is 50%.

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect additional adjustments pertaining to activity through the second quarter.

Revenues

Revenue collection was \$1.48M including 50% of our full annual endowment draw and use of restricted funds for 2025, as well as anticipated releases from grant funds, on an annual budget of \$3,209K (46.16%). Diocesan contributions were at 51.14% of budget.

Expenses

Expenses incurred through Q2 2025 were \$1.38M on an annual budget of \$3,209K (43.02%).

Net Income

Unrestricted net income is \$100K through Q2 2025. This includes \$257K in "Other" income, most of which pertains to the federal Earnings Retention Tax Credit program for pandemic relief.

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

In Christ,

Andrew D. Smith
Treasurer

ORTHODOX CHURCH IN AMERICA
Statement of Operating Activity - FY2025 - Preliminary & Unaudited
June 30, 2025

				Target 50.00%	
A	B	C	D	E	
<i>Unrestricted - Consolidated including OPL</i>	CURRENT QUARTER	2025 YTD ACTUAL	2025 BUDGET	% BUDGET USED	
1	REVENUE				
2	Diocesan Contributions	430,216	904,275	1,768,239	51.14%
3	Individual/Business Contributions	6,228	36,409	155,000	23.49%
4	Indiv. Contributions - OPL General	8,048	9,800	364,734	2.69%
5	Indiv. Contributions - Thriving in Min	-	19,615	95,000	20.65%
6	Indiv. Contributions - Fin. Health Init.	70	70	162,500	0.04%
7	Appeals	-	-	-	
8	Service Fees	1,170	14,886	50,000	29.77%
9	Program Svc Fees - Thriving in Ministry	-	-	21,600	0.00%
10	Interest Income/Realized Gains/Losses	2,215	17,210	50,000	34.42%
11	Interest Income - Fin. Health Init.	11,941	11,941		
12	Other	-	256,794	50,000	513.59%
13	Release from Restriction - Endowed	18,750	37,500	75,000	50.00%
14	Release from Restriction - Restricted	20,000	45,274	90,000	50.30%
15	Release from Grant - Thriving in Min	37,161	50,711	137,250	36.95%
16	Release from Grant - Fin. Health Initiative	4,620	38,130	95,039	40.12%
17	Use of Reserve - OCA Contr. to TiM	12,500	25,000	50,000	50.00%
18	Use of Reserve - OCA Contr. to FHI	6,813	13,625	27,250	50.00%
19	Use of Unrestricted Reserve	-	-	17,500	0.00%
20	TOTAL REVENUE	559,730	1,481,241	3,209,112	46.16%
21					
22					
23					
24	EXPENSES				
25	Administration	227,877	474,649	775,997	61.17%
26	Executive	126,316	266,336	662,106	40.23%
27	Archives	27,523	55,902	111,019	50.35%
28	External Affairs	11,515	34,834	44,500	78.28%
29	Chapel	31	5,305	-	
30	Property	9,451	27,510	127,300	21.61%
31	TOC/Comm	9,627	23,026	36,300	63.43%
32	Holy Synod	5,316	35,953	68,400	52.56%
33	Metropolitan's Office	21,548	49,228	102,147	48.19%
34	Metropolitan Council	5,777	17,980	32,450	55.41%
35	St. Catherine's	16,773	33,545	62,658	53.54%
36	SOCA	-	-	-	
37	BOT	-	-	-	
38	Mission Planting Grants	20,000	40,000	80,000	50.00%
39	Ordination Candidacy	-	6,000	5,000	120.00%
40	Canons & Statutes	-	-	-	
41	ORSMA	8,072	15,572	36,668	42.47%
42	Continuing Ed	-	-	-	
43	Seminaries	-	-	18,000	0.00%
44	Departments	31,307	54,423	109,745	49.59%
45	Office of Pastoral Life, general	42,977	81,119	425,434	19.07%
46	OPL - Thriving in Ministry	49,661	95,325	253,850	37.55%
47	OPL - Financial Health Initiative	23,444	63,767	257,539	24.76%
48	TOTAL EXPENSES	637,212	1,380,474	3,209,112	43.02%
49					
50	REVENUE OVER/(UNDER) EXPENSES	(77,482)	100,766	(0)	

ORTHODOX CHURCH IN AMERICA
Statement of Operating Activity - FY2025 - **Preliminary & Unaudited**
June 30, 2025

				Target 50.00%
A	B	C	D	E
<i>Office of Pastoral Life - Lilly Grant Detail</i>	CURRENT QUARTER	2025 YTD ACTUAL	2025 BUDGET	% BUDGET USED
1	REVENUE			
3				
4	-	19,615	95,000	20.65%
5	-	-	21,600	0.00%
6	37,161	50,711	137,250	36.95%
7	12,500	25,000	50,000	50.00%
8	<i>Thriving in Ministry Subtotal</i>	<i>49,661</i>	<i>95,326</i>	<i>31.37%</i>
9				
10	70	70	162,500	0.04%
11	11,941	11,941	-	
12	4,620	38,130	95,039	40.12%
13	6,813	13,625	27,250	50.00%
14	<i>Financial Health Initiative Subtotal</i>	<i>23,443</i>	<i>63,766</i>	<i>22.39%</i>
15				
16	TOTAL REVENUE	73,103	159,092	27.03%
17				
18	EXPENSES			
19				
20	49,661	95,325	253,850	37.55%
21	23,444	63,767	257,539	24.76%
22				
23	TOTAL EXPENSES	73,104	159,093	31.11%
24				
25	REVENUE OVER/(UNDER) EXPENSES	(1)	77,250	0.00%

ORTHODOX CHURCH IN AMERICA
Balance Sheet - FY2025 - **Preliminary & Unaudited**
June 30, 2025

A	B	C	D
	<u>6/30/2025</u>	<u>12/31/2024</u>	DIFFERENCE
1 ASSETS			
2 Cash & Cash Equivalents - Operating	2,728,943	2,497,897	231,046
3 Cash & Cash Equivalents - Restricted	515,920	545,372	(29,452)
4 Petty Cash	-	-	-
5			
6 Accounts Receivable	37,622	76,431	(38,809)
7 Grants Receivable	-	-	-
8 Prepaid Expense	182,720	85,925	96,796
9 Other Current Assets	1,061	25,406	(24,345)
10			
11 Fixed Assets, net of depreciation	137,366	137,366	-
12 Investments	5,447,864	5,166,244	281,620
13 Right of Use Asset - Office Space & Apt	39,467	51,587	(12,120)
14			
15 Total Assets	<u>9,090,963</u>	<u>8,586,227</u>	<u>504,736</u>
16			
17			
18 LIABILITIES			
19 Accounts Payable	(11,118)	129,017	(140,136)
20 Accrued Expenses	8,127	-	8,127
21 Retirement Obligation	-	-	-
22 Unitrust Liability	904	904	-
23 Payroll Liabilities	55	44	12
24 Other Liabilities	25,000	6,710	18,290
25			
26 Deferred Revenue	438,879	30,851	408,028
27			
28 ST Lease - Office Space	39,467	52,602	(13,135)
29 LT Lease - Office Space	-	-	-
30			
31 Total Liabilities	<u>501,313</u>	<u>220,128</u>	<u>281,186</u>
32			
33			
34 NET ASSETS	<u><u>8,589,649</u></u>	<u><u>8,366,099</u></u>	<u><u>223,550</u></u>

ORTHODOX CHURCH IN AMERICA

2026 Budget - Summary

For consideration at the Fall 2025 Metropolitan Council meeting

				Target 50.00%	
<i>Unrestricted - OCA Operations</i>					
	A	B	C	D	
	YTD Actual	BUDGET	% BUDGET	BUDGET	
	6/30/2025	2025	USED	Original 2026	
1	REVENUE				
2	Diocesan Contributions	904,275	1,768,239	51.14%	1,843,516
3	Individual/Business Contributions	36,409	155,000	23.49%	102,292
4	Individual/Business Contr - OPL General	9,800	364,734	2.69%	126,531
5	Service Fees	14,886	50,000	29.77%	50,000
6	Interest Income/Realized Gains/Losses	17,210	50,000	34.42%	35,000
7	Other	256,794	50,000	513.59%	50,000
8	Release from Restriction - <i>Endowed Funds</i>	37,500	75,000	50.00%	125,000
9	Release from Restriction - <i>Restricted Funds</i>	45,274	90,000	50.30%	114,000
10	Use of Unrestricted Reserve	-	17,500		173,291
11	TOTAL REVENUE	1,322,148	2,620,473	50.45%	2,619,630
12					
13					
14					
15	EXPENSES				
16	Compensation & Benefits				
17	Administration	196,170	313,814	62.51%	357,936
18	Executive	254,010	634,706	40.02%	651,090
19	Archives	55,046	109,519	50.26%	12,000
20	Office of Pastoral Life - General	28,398	168,750	16.83%	102,554
21	Total Compensation & Benefits	533,624	1,226,789	43.50%	1,123,579
22					
23	Goods & Services				
24	Administration	278,479	462,182	60.25%	489,682
25	Executive	11,790	27,400	43.03%	28,200
26	Archives	855	1,500	57.02%	5,000
27	External Affairs	34,834	44,500	78.28%	47,500
28	Property, incl depr.	27,510	127,300	21.61%	105,650
29	TOC/Comm	23,026	36,300	63.43%	46,500
30	Holy Synod	35,926	68,400	52.52%	68,400
31	Metopolitan's Office	55,070	102,147	53.91%	107,147
32	Metropolitan Council	17,980	32,450	55.41%	32,450
33	St. Catherine's	33,545	62,658	53.54%	62,658
34	Mission Planting Grants	40,000	80,000	50.00%	104,000
35	Ordination Candidacy	6,000	5,000	120.00%	5,000
36	ORSMA	15,572	36,668	42.47%	36,668
37	Seminaries	-	18,000	0.00%	18,000
38	Departments	54,423	109,745	49.59%	119,745
39	Office of Pastoral Life - General	52,750	256,684	20.55%	142,200
40	Total Goods & Services	687,760	1,470,935	46.76%	1,418,801
41					
42	TOTAL EXPENSES	1,221,384	2,697,723	45.27%	2,542,380
43					
44	REVENUE OVER/(UNDER) EXPENSES	100,764	(77,250)		77,250
OCA Contribution to Thriving in Ministry					
		25,000	50,000	50.00%	50,000
OCA Contribution to Fin. Health Initiative					
		13,625	27,250	50.00%	27,250
Use of Reserve - Total					
		38,625	77,250	50.00%	77,250

ORTHODOX CHURCH IN AMERICA

2026 Budget - Summary

For consideration at the Fall 2025 Metropolitan Council meeting

	A	B	C	D
	YTD Actual	BUDGET	% BUDGET	BUDGET
<i>Grant Funded Programs</i>	6/30/2025	Amended 2025	USED	Original 2026
			Target 50.00%	
1 <i>Thriving in Ministry</i>				
2 Individual Contributions - Thriving in Min	19,615	95,000		61,000
3 Program Service Fees - Thriving in Ministry	-	21,600		63,356
4 Release from Grant - Thriving in Ministry	50,711	137,250		90,030
5 Use of Reserve - OCA Contribution to TiM	25,000	50,000		50,000
6 TiM Revenue	<u>95,326</u>	<u>303,850</u>	<u>31.37%</u>	264,386
7				
8 Compensation & Benefits	19,998	51,250		59,224
9 Goods & Services	75,327	202,600		205,162
10 TiM Expenses	<u>95,325</u>	<u>253,850</u>	<u>37.55%</u>	264,385
11				
12 REVENUE OVER/(UNDER) EXPENSES	1	50,000		0
13				
14				
15				
16 <i>Financial Health Initiative</i>				
17 Individual Contributions - Fin. Health Init.	70	162,500		95,000
18 Interest Income - Fin. Health Initiative	11,941			18,751
19 Release from Grant - Fin. Health Initiative	38,130	95,039		187,500
20 Use of Reserve - OCA Contribution to FHI	13,625	27,250		27,250
21 FHI Revenue	<u>63,766</u>	<u>284,789</u>	<u>22.39%</u>	328,501
22				
23 Compensation & Benefits	20,004	85,000		68,607
24 Goods & Services	43,763	172,539		259,894
25 TiM Expenses	<u>63,767</u>	<u>257,539</u>	<u>24.76%</u>	328,501
26				
27 REVENUE OVER/(UNDER) EXPENSES	(1)	27,250		0

ORTHODOX CHURCH IN AMERICA

Proposed 2026 Budget - Expenses by Department

	<u>YTD Actual</u>	<u>BUDGET</u>	<u>% BUDGET</u>	<u>BUDGET</u>
	<u>6/30/2025</u>	<u>2025</u>	<u>USED</u>	<u>Original 2026</u>
6010-05 Administration-Salaries	147,568.80	248,615.03		281,955.71
6012-05 Administration-FICA/MED	1,193.40	1,863.78		3,136.50
6013-05 Administration-Unemployment Ins W/H	715.30			
6014-05 Administration-Payroll Processing Fees	1,830.43	3,000.00		3,000.00
6015-05 Administration-Health Insurance	20,411.47	22,936.44		30,249.44
6016-05 Administration-Workers Compensation/Disabil	2,063.50	651.72		709.23
6017-05 Administration-Pension expense	20,611.96	34,147.18		36,285.45
6018-05 Administration-Life Insurance	1,775.10	2,600.00		2,600.00
	<u>196,169.96</u>	<u>313,814.16</u>	<u>62.51%</u>	<u>357,936.34</u>
				p.1 line 17
6051-05 Administration-Charity Distribution	2,000.00			
6095-05 Administration-Bank Fees	6,092.66	5,000.00		5,000.00
6096-05 Administration-Dues		-		-
6100-05 Administration-Office Expense	771.66	-		-
6105-05 Administration-Food	456.03	1,000.00		1,000.00
6110-05 Administration-Flowers/Candles/Liturgical ite	(385.22)	5,600.00		5,600.00
6211-05 Administration-Accounting Fees	16,945.52	25,000.00		25,000.00
6214-05 Administration-Legal Fees	38,726.70	94,000.00		94,000.00
6215-05 Administration-Outside Contract Services	68,106.29	62,000.00		62,000.00
6280-05 Administration-Rent	36,498.73	72,070.39		72,070.39
6284-05 Administration-Equipment Rental & Maint.	232.00			
6501-05 Administration-Books, Subscriptions, Dues	876.33	-		-
6502-05 Administration-Postage, Mailing Service	420.67	1,500.00		1,500.00
6503-05 Administration-Printing and Copying		1,000.00		1,000.00
6504-05 Administration-Supplies	1,082.17	2,000.00		2,000.00
6505-05 Administration-Cell Phones	590.92			
6512-05 Administration-Insurance - Liability, D and O		-		-
6516-05 Administration-Misc Other	329.67	-		-
6650-05 Administration-Stipends	20,550.00	41,000.00		47,000.00
6670-05 Administration-Computer Expense	549.98	2,000.00		2,000.00
6720-05 Administration-Telephone	1,079.22	1,000.00		1,000.00
6727-05 Administration-Internet	713.76	3,500.00		3,500.00
6733-05 Administration-Website	1,800.00	-		-
6750-05 Administration-Insurance	20,227.75	31,229.25		31,229.25
6831-05 Administration-Conference, Convention, Meeting		-		10,000.00
6832-05 Administration-Travel	2,287.01	-		5,000.00
6833-05 Administration-Lodging	2,976.77	-		5,000.00
6834-05 Administration-Meals	1,550.39	1,000.00		2,500.00
6835-05 Administration-Moving Expenses		-		-
6900-05 Administration-Automobile		2,782.73		2,782.73
6903-05 Administration-Auto gasoline		500.00		500.00
6910-05 Administration-Other	54,000.00	110,000.00	[A]	110,000.00
	<u>278,479.01</u>	<u>462,182.37</u>	<u>60.25%</u>	<u>489,682.37</u>
				p.1 line 24

[A] \$9,000 per month in support of Pension Plan administrative expenses.

ORTHODOX CHURCH IN AMERICA
Proposed 2026 Budget - Expenses by Department

	<u>YTD Actual</u> <u>6/30/2025</u>	<u>BUDGET</u> <u>2025</u>	<u>% BUDGET</u> <u>USED</u>	<u>BUDGET</u> <u>Original 2026</u>
6010-07 Executive-Salaries	211,449.04	527,879.84		526,233.90
6012-07 Executive-FICA/MED	1,654.70	3,213.00		3,592.27
6014-07 Executive-Payroll Processing Fees		-		-
6015-07 Executive-Health Insurance	18,625.93	34,225.08		58,346.46
6016-07 Executive-Workers Compensation/Disability		2,366.30		2,213.18
6017-07 Executive-Pension expense	22,279.88	67,021.52		60,703.71
	<u>254,009.55</u>	<u>634,705.74</u>	<u>40.02%</u>	<u>651,089.52</u>
				p.1 line 18
6105-07 Executive-Food	-	-		-
6110-07 Executive-Flowers/Candles/Liturgical item	5,305.32	-		-
6501-07 Executive-Books, Subscriptions, Dues	2,088.74	-		-
6504-07 Executive-Supplies	-	1,000.00		1,000.00
6515-07 Executive-Memberships	-	-		-
6650-07 Executive-Stipends	-	-		-
6720-07 Executive-Telephone	393.56	-		-
6725-07 Executive-Mobile Phones	-	7,200.00		7,200.00
6727-07 Executive-Internet	1,949.69	-		-
6832-07 Executive-Travel	1,457.61	18,000.00		18,000.00
6833-07 Executive-Lodging	-	-		-
6834-07 Executive-Meals	594.94	1,200.00		2,000.00
6903-07 Executive-Auto gasoline	-	-		-
6910-07 Executive-Other Administrative Expense	-	-		-
	<u>11,789.86</u>	<u>27,400.00</u>	<u>43.03%</u>	<u>28,200.00</u>
				p.1 line 25

ORTHODOX CHURCH IN AMERICA

Proposed 2026 Budget - Expenses by Department

	<u>YTD Actual</u>	<u>BUDGET</u>	<u>% BUDGET</u>	<u>BUDGET</u>
	<u>6/30/2025</u>	<u>2025</u>	<u>USED</u>	<u>Original 2026</u>
6010-08 Archives-Salaries	38,706.00	77,412.18		12,000.00
6012-08 Archives-FICA/MED	2,961.01	6,997.03		-
6015-08 Archives-Health Insurance	7,960.56	14,052.26		-
6016-08 Archives-Workers Compensation/Disability		219.51		-
6017-08 Archives-Pension expense	5,418.84	10,837.70		-
	<u>55,046.41</u>	<u>109,518.68</u>	<u>50.26%</u>	<u>12,000.00</u>
				p.1 line 19
6092-08 Archives-Business Registration Fees	-	200.00		-
6215-08 Archives-Outside Contract Services				5,000.00
6504-08 Archives-Supplies	-	800.00		-
6832-08 Archives-Travel	855.27	500.00		-
	<u>855.27</u>	<u>1,500.00</u>	<u>57.02%</u>	<u>5,000.00</u>
				p.1 line 26

ORTHODOX CHURCH IN AMERICA

Proposed 2026 Budget - Expenses by Department

	YTD Actual	BUDGET	% BUDGET	BUDGET
	6/30/2025	2025	USED	Original 2026
6010-09 External Affairs-Salaries	-	-		-
6012-09 External Affairs-FICA/MED	-	-		-
6013-09 External Affairs-Unemployment Ins W/H	-	-		-
6016-09 External Affairs-Workers Compensation/Disabi	-	-		-
6017-09 External Affairs-Pension expense	-	-		-
	<hr/>	<hr/>		
6096-09 External Affairs-Dues	15,000.00	39,500.00		39,500.00
6516-09 External Affairs-Misc - Other	934.71			
6831-09 External Affairs-Conference, Convention, Meetir	285.00	-		-
6832-09 External Affairs-Travel	11,998.93	5,000.00		8,000.00
6833-09 External Affairs-Lodging	5,335.40	-		-
6834-09 External Affairs-Meals	1,280.11	-		-
	<hr/>	<hr/>	<hr/>	<hr/>
	34,834.15	44,500.00	78.28%	47,500.00
				<i>p.1 line 27</i>

ORTHODOX CHURCH IN AMERICA

Proposed 2026 Budget - Expenses by Department

	YTD Actual	BUDGET	% BUDGET	BUDGET
	6/30/2025	2025	USED	Original 2026
6010-11 Property Support-Salaries	-	-		-
6012-11 Property Support-FICA/MED	-	-		-
6013-11 Property Support-Unemployment Ins W/H	-	-		-
6015-11 Property Support-Health Insurance	-	-		-
6016-11 Property Support-Workers Comp/Disability	-	-		-
6017-11 Property Support-Pension expense	-	-		-
	-	-		-
6215-11 Property Support-Outside Contract Services	-	5,000.00		17,000.00
6273-11 Property Support-Real Estate, Personal Prop Ta	-	45,000.00		45,000.00
6285-11 Property Support-Janitorial Services	1,085.00	-		-
6286-11 Property Support-Lawn	8,750.00	20,000.00		10,000.00
6287-11 Property Support-Exterminating	484.00	500.00		250.00
6288-11 Property Support-Garbage Removal	750.00	3,000.00		1,500.00
6290-11 Property Support-Repairs expense	-	3,000.00		1,500.00
6504-11 Property Support-Supplies	-	600.00		300.00
6701-11 Property Support-Heating oil	12,382.65	20,000.00		15,000.00
6703-11 Property Support-Water	29.04	200.00		100.00
6705-11 Property Support-Electricity	4,029.48	12,000.00		6,000.00
6750-11 Property Support-Insurance	-	18,000.00		9,000.00
6990-11 Property Support-Depreciation expense	-	-		-
	<u>27,510.17</u>	<u>127,300.00</u>	<u>21.61%</u>	<u>105,650.00</u>
				p.1 line 28

ORTHODOX CHURCH IN AMERICA

Proposed 2026 Budget - Expenses by Department

	<u>YTD Actual</u>	<u>BUDGET</u>	<u>% BUDGET</u>	<u>BUDGET</u>
	<u>6/30/2025</u>	<u>2025</u>	<u>USED</u>	<u>Original 2026</u>
6010-35 Sexual Misconduct Committ-Salaries	-	-		-
6012-35 Sexual Misconduct Committ-FICA/MED	-	-		-
6013-35 Sexual Misconduct Committ-Unemployment Ins W/H	-	-		-
6015-35 Sexual Misconduct Committ-Health Insurance	-	-		-
6016-35 Sexual Misconduct Committ-Workers Compensation/Dis	-	-		-
	-	-		-
6095-35 Sexual Misconduct Committ-Bank Fees	-	-		-
6215-35 Sexual Misconduct Committ-Outside Contract Services	571.55	36,000.00		36,000.00
6502-35 Sexual Misconduct Committ-Postage, Mailing Service	-	68.00		68.00
6504-35 Sexual Misconduct Committ-Supplies	-	-		-
6650-35 Sexual Misconduct Committ-Stipends	15,000.00	-		-
6832-35 Sexual Misconduct Committ-Travel	-	600.00		600.00
6832-35 Sexual Misconduct Committ-Other Admin Expense	-	-		-
	<u>15,571.55</u>	<u>36,668.00</u>	<u>42.47%</u>	<u>36,668.00</u>
				p.1 line 36

ORTHODOX CHURCH IN AMERICA
Proposed 2026 Budget - Expenses by Department

	YTD Actual	BUDGET	% BUDGET	BUDGET
	6/30/2025	2025	USED	Original 2026
6215-13 Communications-Outside Contract Services	2,506.25	20,000.00		5,000.00
6503-13 Communications-Printing and Copying	-	-		-
6650-13 Communications-Stipends	10,500.00	1,800.00		27,000.00
6670-13 Communications-Computer expense	-	2,500.00		2,500.00
6733-13 Communications-Website	10,020.20	12,000.00		12,000.00
6832-13 Communications-Travel	-	-		-
	<u>23,026.45</u>	<u>36,300.00</u>	<u>63.43%</u>	<u>46,500.00</u>
				p.1 line 29
6105-14 Holy Synod-Food		-		-
6502-14 Holy Synod-Postage		-		-
6503-14 Holy Synod-Printing	70.85	1,000.00		1,000.00
6504-14 Holy Synod-Supplies		-		-
6650-14 Holy Synod-Stipends	7,200.00	14,400.00		14,400.00
6832-14 Holy Synod-Travel	9,381.75	25,000.00		25,000.00
6833-14 Holy Synod-Lodging	16,806.63	20,000.00		20,000.00
6834-14 Holy Synod-Meals	2,466.73	8,000.00		8,000.00
6903-14 Holy Synod-Gasoline	27.00	-		-
	<u>35,925.96</u>	<u>68,400.00</u>	<u>52.52%</u>	<u>68,400.00</u>
				p.1 line 30
6015-15 Metropolitan's Office-Health Insurance	5,841.64			
6051-15 Metropolitan's Office-Charity Distribution				
6105-15 Metropolitan's Office-Food		-		-
6110-15 Metropolitan's Office-Liturgical Items	3,658.24	8,000.00		8,000.00
6280-15 Metropolitan's Office-Rent	17,500.00	42,600.00		42,600.00
6504-15 Metropolitan's Office-Supplies	599.06	750.00		750.00
6516-15 Metropolitan's Office-Misc Other	230.81			
6650-15 Metropolitan's Office-Stipends	600.00	-		-
6701-15 Metropolitan's Office-Heating Oil	486.15			
6703-15 Metropolitan's Office-Water	369.71	2,100.00		2,100.00
6705-15 Metropolitan's Office-Electricity	180.56	1,440.00		1,440.00
6727-15 Metropolitan's Office-Internet	487.14	864.00		864.00
6750-15 Metropolitan's Office-Insurance		793.00		793.00
6831-15 Metropolitan's Office-Conf., Convention, Meeting	381.94			
6832-15 Metropolitan's Office-Travel	20,468.71	35,000.00		40,000.00
6833-15 Metropolitan's Office-Lodging	1,749.16	5,000.00		5,000.00
6834-15 Metropolitan's Office-Meals	1,807.43	2,000.00		2,000.00
6900-15 Metropolitan's Office-Automobile	308.37	600.00		600.00
6903-15 Metropolitan's Office-Auto Gasoline	400.59	-		-
6902-15 Metropolitan's Office-Other Discretionary		3,000.00		3,000.00
	<u>55,069.51</u>	<u>102,147.00</u>	<u>53.91%</u>	<u>107,147.00</u>
				p.1 line 31
6051-16 Metropolitan Council-Charity Distribution		-		-
6110-16 Metropolitan Council-Liturgical Items	17,980.00	-		-
6215-16 Metropolitan Council-Outside Contract Svcs		-		-
6504-16 Metropolitan Council-Supplies		50.00		50.00
6832-16 Metropolitan Council-Travel	-	12,000.00		12,000.00
6833-16 Metropolitan Council-Lodging		18,000.00		18,000.00
6834-16 Metropolitan Council-Meals		2,400.00		2,400.00
	<u>17,980.00</u>	<u>32,450.00</u>	<u>55.41%</u>	<u>32,450.00</u>
				p.1 line 32

ORTHODOX CHURCH IN AMERICA
Proposed 2026 Budget - Expenses by Department

	<u>YTD Actual</u> <u>6/30/2025</u>	<u>BUDGET</u> <u>2025</u>	<u>% BUDGET</u> <u>USED</u>	<u>BUDGET</u> <u>Original 2026</u>
6017-17 St Catherine's Representa-Pension expense	7,090.88	9,558.02		9,558.02
6502-17 St Catherine's Representa-Postage, Mailing				
6650-17 St Catherine's Representa-Stipends	26,454.48	53,100.12		53,100.12
6832-17 St Catherine's Representa-Travel				
	<u>33,545.36</u>	<u>62,658.14</u>	53.54%	62,658.14
				p.1 line 33
6050-30 Missions and Planting Gra-Distributions	<u>40,000.02</u>	<u>80,000.00</u>	50.00%	104,000.00
				p.1 line 34
6215-34 Ordination Candidate Test-Outside Contract Services	<u>6,000.00</u>	<u>5,000.00</u>	120.00%	5,000.00
				p.1 line 35
6050-40 Seminaries-Distributions	<u>-</u>	<u>18,000.00</u>	0.00%	18,000.00
				p.1 line 37
6017-80 Ministries-Pension Expense	3,132.00			
6052-80 Ministries-Mission Distribution				
6096-80 Ministries-Dues		1,400.00		1,400.00
6215-80 Ministries-Outside Contract Services		1,014.00		1,014.00
6253-80 Ministries-Program Supplies		-		-
6503-80 Ministries-Printing and Copying		501.00		501.00
6504-80 Ministries-Supplies		3,900.00		3,900.00
6650-80 Ministries-Stipends	50,740.00	92,100.00		102,100.00
6733-80 Ministries-Website		1,830.00		1,830.00
6831-80 Ministries-Conference, Convention, Meeting		1,500.00		1,500.00
6832-80 Ministries-Travel	550.96	7,500.00		7,500.00
	<u>54,422.96</u>	<u>109,745.00</u>	49.59%	119,745.00
				p.1 line 38
Office of Pastoral Life				
<i>Administration</i>				
6017-40 OPL-Pension Expense				
6214-40 OPL-Legal Fees				
6215-40 OPL-Outside Contract Services				
6253-40 OPL-Program Supplies				
6501-40 OPL-Books, Subscriptions, Dues				
6650-40 OPL-Stipends				
6733-40 OPL-Website				
6831-80 OPL-Conference, Convention, Meeting				
6832-40 OPL-Travel				
6833-40 OPL-Lodging				
6834-40 OPL-Meals				
6050-40 OPL-Distributions				
<i>Clergy Synaxis</i>				
6215-40 Clergy Synaxis-Outside Contract Services				
6650-40 Clergy Synaxis-Stipends				
<i>Clergy Wives</i>				
6215-40 Clergy Wives-Outside Contract Services				
6502-40 Clergy Wives-Postage, Mailing Service				
6504-40 Clergy Wives-Supplies				
6650-40 Clergy Wives-Stipends				
6733-40 Clergy Wives-Website				
6832-40 Clergy Wives-Travel				
6833-40 Clergy Wives-Lodging				
6834-40 Clergy Wives-Meals				
	<u>-</u>	<u>-</u>		-
				See OPL page

Orthodox Church in America
Office of Pastoral Life
 Budget 2026

Expenditures	Clergy Wives			800 TIM Lilly	805 FHI Lilly	TOTAL	
	40 OPL	Synaxis	Group	Total 40 OPL	Grant		Grant
6010 Salaries							
OPL Director	49,199.93			49,199.93	33,209.95	40,589.94	122,999.81
Director of Operations	-			-	-	-	-
Director of Development	40,000.00			40,000.00	17,000.00	17,000.00	74,000.00
6012 FICA/MED				-			-
6013 Unemployment Ins W/H				-			-
6014 Payroll Processing Fees				-			-
6015 Health Insurance	6,829.10			6,829.10	4,609.64	5,634.00	17,072.74
6016 Workers Compensation/Disability	126.08			126.08	85.10	104.01	315.20
6017 Pension expense	6,398.50			6,398.50	4,318.99	5,278.77	15,996.26
<i>Salaries & Benefits Subtotal</i>	<i>102,553.60</i>	<i>-</i>	<i>-</i>	<i>102,553.60</i>	<i>59,223.68</i>	<i>68,606.72</i>	<i>230,384.01</i>
				<i>p.1 line 20</i>	<i>p.2 line 8</i>	<i>p.2 line 23</i>	
6050 Distributions - Grants & Endowments				-		172,500.00	172,500.00
6100 Office expense				-			-
6211 Accounting Fees				-	4,000.00	4,000.00	8,000.00
6214 Legal Fees				-			-
6215 Outside Contract Services							
Evaluations Consultant	5,000.00			5,000.00	-	1,500.00	6,500.00
Communications Consultant	6,500.00			6,500.00	7,000.00	21,600.00	35,100.00
Strategy Consultant - OMS				-	2,000.00	10,000.00	12,000.00
Educators					4,000.00		4,000.00
Technology Consultant	18,000.00			18,000.00	-	-	18,000.00
6251 Conferences/Space Rental				-			-
6253 Program Supplies				-		4,724.00	4,724.00
6501 Books, Subscriptions, Dues				-			-
6502 Postage, Mailing Service	500.00		2,500.00	3,000.00	200.00	500.00	3,700.00
6503 Printing and Copying	1,000.00		2,500.00	3,500.00			3,500.00
6504 Supplies	1,500.00		-	1,500.00		2,500.00	4,000.00
6650 Stipends	26,000.00	25,000.00	28,500.00	79,500.00	144,120.00	30,000.00	253,620.00
6654 stipend				-			-
6671 Computer software expense	2,500.00			2,500.00	3,000.00	3,000.00	8,500.00
6831 Conference, Convention, Meeting	1,000.00		-	1,000.00			1,000.00
6832 Travel	18,000.00		1,500.00	19,500.00	21,760.00	5,000.00	46,260.00
6833 Lodging			750.00	750.00	6,247.50	2,800.00	9,797.50
6834 Meals	750.00		500.00	1,250.00	12,834.00	1,770.00	15,854.00
6900 Automobile			200.00	200.00			200.00
<i>Goods & Services Subtotal</i>	<i>80,750.00</i>	<i>25,000.00</i>	<i>36,450.00</i>	<i>142,200.00</i>	<i>205,161.50</i>	<i>259,894.00</i>	<i>607,255.50</i>
				<i>p.1 line 39</i>	<i>p.2 line 9</i>	<i>p.2 line 24</i>	
Total Expenditures	183,303.60	25,000.00	36,450.00	244,753.60	264,385.18	328,500.72	837,639.51

Appendix A

Orthodox Church in America

Housing Allowances - 2026

Fr. Alessandro Margheritino

\$5833.33 per month (\$70,000 per year)

Fr. David Bozeman

\$4,000 per month (\$48,000 per year)

Fr. John Mikitish

\$4,000 per month (\$48,000 per year)

Dn. Alexander Woodill

\$5,416.66 per month (\$65,000 per year)

Fr. Nicholas Solak

\$2,666.67 per month (\$32,000 per year)

The first four estimates above are reasonable for rental/mortgage payments for recently-acquired homes in the D.C. area (\$4,500+ per month) and utilities (\$500 per month for electricity, gas, water, internet, etc.). Fr. Nicholas Solak's estimate is reasonable for East Stroudsburg, PA.

September 26, 2025

Your Beatitude and esteemed members of Metropolitan Council,

Most blessed master, bless!

The communications ministry of the Orthodox Church in America remains active each day on Facebook, X (Twitter), Instagram, and Telegram, sharing regular news, scripture readings, liturgical texts, and other materials supporting the life of the Church.

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

Facebook: Engagements: 39K | Followers: 44.9K | Average new followers per day: 12.
X (Twitter): Engagements: 8K | Followers: 31.5K | Average new followers per day: 10.
Instagram: Engagements: 39K | Followers: 14.9K | Average new followers per day: 15.
Telegram: Subscribers: 1.5K.

Since the previous report, communications have mainly centered around the 21st All-American Council. In the months leading up to the meeting, the OCA website hosted the necessary preparatory documents, reports, registration information, articles, and the Delegate Handbook. During the Council itself, the coordinated work of the Press Team provided daily news releases and consistent social media coverage that was timely and effective. I am deeply appreciative of their efforts and the results are clear: from July 14-18, our social media platforms recorded over 13k post engagements – an average increase of 351%. This surge was driven primarily by strong visual content, with the posted photos generating 69.02% of clicks, video 23.03%, and other links 7.21%. For the same period, Facebook logged 225k impressions – an extraordinary rise of 497%. While social media surrounding the 20th AAC in Baltimore also saw significant increases, the canonization of the Righteous Olga of Kewthluk drew special attention.

Aside from AAC related content, the most engaged social media posts include the video of Your Beatitude's concelebration with His Beatitude Archbishop Stefan, Fr. Paul Kucynda's In Memoriam, and various lives of saints. Other popular posts include the congratulations offered on Your Beatitude's birthday, the various Names Days of the Holy Synod, and anniversaries which are perennially popular. We average 3 social media posts per day.

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

Users: 481k, Sessions: 1.24M, Average length of time: 4m 03s. There were 3.4M unique page views, with the most popular sections remaining the Scripture readings, Lives of the Saints, catechetical material, and liturgical downloads.

The top news stories were the statement of apology from His Eminence Archbishop Alexei, the press releases surrounding the episcopal ordination of His Grace Bishop Vasily, and the announcements regarding the recognition of the Macedonian Orthodox Church.

Since our last discussions with the website developer, Ms. Deb Colitas, she has been working on the update and redesign to oca.org. We have identified some of the key challenges, most notably the need to transition from the outdated Expression Engine platform currently supporting the site to a modern platform such as Wordpress that will better serve the needs of the OCA currently and in future. Ms. Colitas has been consulting with outside developers who specialize in these website migrations. At present, oca.org contains between 100,000 and 200,000 individual pages, requiring careful decisions about what content is essential to transfer and how best to manage material going forward to avoid future issues.

Looking ahead, preparations are underway for our annual promotions of Church Musician Sunday (October 5, 2025), and Steward Sunday (date TBD), in cooperation with Fr. Justin Patterson and the OCA Departments.

Thank you for your continued support of this work.

Yours in Christ,

Priest Kyle Parrott



Metropolitan Council

As of September 5, 2025

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