



St. Louis, Missouri
July 23-27, 2018

OFFICERS' REPORTS

Bring this handbook to the AAC and place it in the notebook provided at registration

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This report has been prepared to introduce the work of the Officers of The Orthodox Church in America for the 19th All-American Council to be held in St. Louis, MO from July 23 through July 27, 2018.

Contained in this report are the job descriptions and overview of the work of the Chancellor, Secretary, Treasurer and Director of External Affairs and Inter-Church Relations. The Chancellor's report will include a section on the work of the Sexual Misconduct Policy Advisory Committee which he has immediate oversight. The Secretary's report will contain a subsection on Archives. The Treasurer's report contains specifics on the financial condition of the Church from both a historical and prospective standpoint. A full financial report of the Orthodox Church in America can be found in the Financial Report.

At the Council, each Officer will present a short oral report followed by questions/comments from the floor. The Treasurer will give a more detailed report on the finances of the Church at a dedicated Plenary Session. This report should be read in its entirety prior to the beginning of the Council.

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1. Job Description of the Chancellor

Supervisory and Job Controls

Is assigned areas of responsibility and scope of decision-making by the Metropolitan. Serves the Metropolitan as a trusted assistant and is accountable to the Metropolitan and Holy Synod in assigned areas. In accomplishing work, follows legal, regulatory, and established Best Practices and Policies for Financial Accountability of the OCA, keeping the Metropolitan informed of all non-routine issues and decisions. Work is assessed in terms of overall accomplishments, timeliness, and responsiveness to the needs of the Church, within assigned areas.

Major Duties

Serves as assistant and advisor to the Metropolitan of the Orthodox Church in America, is responsible for the administrative oversight and day-to-day operations of the Chancery, and is the main liaison for communications of chancery activities to the Metropolitan, Holy Synod and Metropolitan Council.

1. Assists the Metropolitan in managing national-level clergy-related activities, including seminarian development and ordination, inter-jurisdictional transfers, continuing education, and retired clergy and widows' support. Works closely with the Church's hierarchs and seminaries to implement programs in the best interests of the Church, its dioceses, and individual members of the clergy. As required, reports progress, problems, and recommendations to the Metropolitan and Holy Synod, as well as to the OCA's Councils, Synods, and membership.
2. Oversees and/or guides the work of the Board of Theological Education and assigned OCA Departments, Committees, Boards, and Commissions. Assists in development of organizational goals and objectives including budget proposals; oversees progress against goals including financial stewardship; provides direction when necessary; ensures appropriate coordination among the various individuals and groups assigned him; ensures appropriate reporting to OCA Councils, Synods and membership; and resolves problems that transcend the scope of individual organizations.
3. As assigned, represents the Metropolitan and Holy Synod in religious, spiritual and administrative activities; acts in his/their stead in dealings with clergy, laity, employees, and organizations of the OCA and with other religious jurisdictions and lay organizations. In this capacity, acts to maintain the organizational integrity and further the growth of the Church.
4. Serves as Chief of Staff for the Chancery.
5. Serves as a voting Member of the Metropolitan Council.

6. Oversees the Office of Review of Sexual Misconduct Allegations; continually communicates the activities of that Office to the Metropolitan and Holy Synod.
7. Serves as ex-officio member of the Boards of Trustees of St. Herman's, St. Tikhon's and St. Vladimir's Seminaries.

Performs other duties as assigned.

Job Requirements

1. Is a Priest in good standing in the OCA for a minimum of ten years, possessing excellent pastoral and administrative experience and skills, and recognized for living the precepts of the Gospel.
2. Is held in high respect by hierarchs, clergy and laity.
3. Demonstrates expertise in ecclesiology, canon law, and traditions.
4. Demonstrates familiarity with existing OCA Statute, procedures and policies.
5. Possesses a degree in theology and/or ministry, preferably from an Orthodox school of theology.
6. Is able to express ideas - and conclusions effectively and persuasively, both orally and in writing.
7. Must be willing to relocate to the proximity of the Chancery located on Long Island, New York.

2. Report of the Chancellor

Archpriest John Jillions

Restructuring Chancery Operations

After almost seven years as your Chancellor this will be my last report to an All-American Council, since at His Beatitude's request I will be stepping down from that role as he and the Holy Synod undertake a comprehensive restructuring of the OCA Chancery operations and personnel. Since the fall of 2017 His Beatitude has been working with Bishop Daniel to review the operations of the Chancery. There has been a reorganization of the office space, starting with moving His Beatitude to the central office (formerly the chancellor's office) and reassigning the officers to other offices on the second floor of the chancery. At the same time, a review is underway of all chancery operations, structures and job descriptions.

On April 26, 2018 His Beatitude sent a letter to the officers and staff to explain the next steps in the process, and he subsequently met with everyone together and individually.

At the most recent Spring session of the Holy Synod I presented the following plan for moving this process forward from the evaluation stage to the implementation stage. The plan received the full support from the members of the Holy Synod...In the first place, with the consent of the Holy Synod, I have appointed His Grace, Bishop Daniel, to serve as temporary Chancery Administrator to oversee the restructuring process of the Chancery operations, the functions and competencies of the Officers and Staff, and all matters related to the operation of the Chancery and the office of the Metropolitan. This work will begin immediately, with foreseeable completion of the restructuring task by December 31, 2018.

The Metropolitan goes on to say in his letter that in accordance with past practice he is "asking all Officers and Staff to submit their resignations, effective at the conclusion of the 19th All American Council, July 28, 2018." Decisions about future appointments will be made by the end of August, and the restructuring plan aims to be complete by December 31, 2018.

"A Change, not a Crisis"

I would like to underline that this is a change, not a crisis. The OCA's vision is compelling, its leadership is in good hands and its finances are sound. So while there is always a natural anxiety about change and uncertainty—especially for those directly involved—I think of this time as the period between the Ascension and Pentecost. At the Ascension the disciples should have been anxious about the future not knowing precisely what to expect or when, but they waited for the promise of the Holy Spirit.

They could do this because they trusted Christ. This is the nature of faith: to trust God through times of discomfort, uncertainty and change.

Chancellor's Role

I would like to offer some brief reflections on the role of chancellor in the past seven years. Since my appointment as Chancellor in October 2011 the OCA has undergone tremendous changes, beginning with the difficult last months of Metropolitan Jonah's primacy and his resignation. Archbishop Melchisedek had been serving as Acting Chancellor since the controversial termination of the former chancellor, Fr Alexander Garklavs. At the time I came on board there was a sense of powerlessness and doom felt everywhere: from Metropolitan Jonah, bishops, officers, MC members, and clergy and faithful across the OCA. When I arrived in Syosset with my wife Denise for my interview with the Holy Synod, this pall of grey was almost visible. We both felt it and were even more alarmed at what we were getting into. Almost everyone had warned me against taking the job, saying, "nothing will ever change." Most of the bishops were pessimistic too. One told me, "Well, someone has to do this job and it may as well be you. But I don't think anything will change." On top of this I was told in no uncertain terms that I could be let go at any time.

Metropolitan Jonah's resignation in July 2012 was followed by an interim period under the guidance of His Eminence, Archbishop Nathaniel as *locum tenens*, the election of Metropolitan Tikhon in November 2012, his installation in January 2013 and his gradual stepping into the new role of Primate. During this time and afterwards the OCA Chancery not only had to ensure as much as possible a peaceful transition from Metropolitan Jonah to Metropolitan Tikhon, but also had to keep normal matters flowing while also developing personnel, policies and procedures adequate to dealing with a backlog of sexual misconduct cases that threatened to further undermine the life of the OCA. This too was complicated by endless internal debates that seemed to thrive on chaos and undermined orderly administration.

By God's grace this dismal picture has turned around, and much of this has been the result of Metropolitan Tikhon's calming leadership.

The Chancellor's Job Description

The chancellor's role, up to now, has been closely tied to the Metropolitan. The current job description puts this right up front:

Serves the Metropolitan as a trusted assistant and is accountable to the Metropolitan and Holy Synod ...

Serves as assistant and advisor to the Metropolitan of the Orthodox Church in America, is responsible for the administrative oversight and day-to-day operations of the Chancery, and is the main liaison for communications of chancery activities to the Metropolitan, Holy Synod and Metropolitan Council.

It's difficult for a job description to capture this essential dimension of the Chancellor's role as trusted assistant and advisor to the Metropolitan. It requires friendship, not in the sense of being a peer, but in the sense of one who loves him and looks out for his best interest both personally and as Primate of the Orthodox Church in America. A friend also in the sense of speaking the truth as best I can, even if I know it might be unpleasant to hear, and without regard for personal consequences. For this reason it is critical that the chancellor be aware of all the issues large and small that might come into the Metropolitan's orbit. A big part of the chancellor's role is to keep the Metropolitan aware of the big picture and help him assess all sides of a given situation as he considers a course of action.

The chancellor also has particular areas for which he is responsible, just as the other two officers have direct responsibility for their particular areas. Like the chancellor they too report directly to the Metropolitan. But to do his main job properly, the chancellor needs to be aware of all the areas. Parallel to this, as chief of staff the chancellor needs to be fully informed—and if necessary involved in—all aspects of the Chancery's work. There is a fine balance required here to avoid stepping on toes and taking away the legitimate responsibility and authority of the other officers and staff.

I have felt from the beginning that there is an unresolved lack of clarity about the role and authority of the chancellor as Chief of Staff and I repeatedly raised this as a concern since at least 2013. The work of the OCA's central administration would go much more smoothly if the officers and staff understand that the Metropolitan needs a chief of staff who is fully aware of all aspects of the chancery operations and has the authority of the Metropolitan to carry out this responsibility. This is certainly one of the areas that must be addressed in reviewing and restructuring chancery operations.

Chancellor's Activities

The normal day-to-day routine includes emails, phone calls, discussions and particular assignments from Metropolitan Tikhon. He also communicates and meets regularly with the other officers separately and all of us together. The Metropolitan's office is involved in preparing draft texts for His Beatitude, addressing complaints against (and from) clergy and bishops, crisis situations, requests for transfers, lifting of depositions, meetings with Metropolitan Tikhon, officers and others. I work with Barry Migyanko (the Executive Administrator) on administration of pastoral changes, have calls with Cindy Heise and ORSMA consultants about ongoing misconduct cases, calls with diocesan bishops, chancellors and seminary administration, and have meetings related to the OCA's external relations.

In addition to Barry Migyanko and Cindy Heise, as you would expect I work regularly with all the OCA officers and staff, including Fr Eric G. Tosi (Secretary) and Melanie Ringa (Treasurer), Archdeacon Joseph Matusiak (Metropolitan's Secretary and Stewardship coordinator), Fr Leonid Kishkovsky (External Affairs), Fr Kirill Sokolov (Board of Theological Education and Diaconal Vocations), Alexis Liberovsky (Archivist),

Judge ER Lanier (General Counsel), Fr John Matusiak (Communications Editor) and Jessica Furhman (website), Roman Ostash (Metropolitan's Subdeacon) and Svetlana Radunceva (housekeeper.) The OCA Pension Office (Maureen Ahearn and Barbara Anderson) has its own separate work and organization apart from the OCA administration but their offices are in the Chancery, so we interact daily. The OCA is privileged to have a dedicated and hard-working staff at the Chancery and I am grateful to have had the opportunity to work with them.

There is also the life of St Sergius Chapel, which includes pastoral care for the small community and a weekly schedule of services. The St Sergius community is grateful to have Fr Basil Summer (now aged 92) as a member. He is present for services and continues to serve from time to time, and he is always a lively and inspiring presence among us. The choir director is normally Matushka Christina Tosi. David and Kathy Linke are faithful volunteers.

Chancellor's Areas of Focus

In addition to his general job description, the chancellor, like all three OCA officers, has some specific areas of focus. The chancellor's areas include seminaries and theological education, the Department of Pastoral Life, clergy matters, the Office for Review of Sexual Misconduct Allegations (ORSMA) and the Sexual Misconduct Policy Advisory Committee (SMPAC.)

Department of Pastoral Life

Bishop Paul is the episcopal moderator, I am the department chair and Hieromonk Nikodhim (Preston) is the administrator. Fr Nikodhim normally comes to the Chancery on Mondays to oversee progress on a number of initiatives to advance the ministries, collegiality and health of clergy and their families. The executive committee meets monthly by teleconference (in addition to the above this includes Fr Stephen Vernak (EPA), Fr David Lowell (DOW), Fr Dennis Rhodes (Alb), Fr Gregory Safchuk (DC), Fr Nicholas Solak (EPA) and Cindy Heise (in her role as social worker, with special concern for clergy wives and families.) The Department report has further details on all the initiatives below.

- Update of the OCA's *Guidelines for Clergy*
- Clergy peer-learning groups (the HOPE program)
- Clergy wives and families
- Clergy demographic project (clergy retirement)
- "Discerning Celibacy"
- Pastoral Care and Sexuality (interviews with members of the Holy Synod)
- Update of the OCA's *Clergy Compensation Guidelines*
- Possible clergy mutual aid fund

The Department's most significant project at the moment is the recent submission of a major grant request to the Lilly Endowment (\$500,000 over the next five years) to make

available to the rest of the OCA the highly successful peer-learning program initiated in the Diocese of Eastern Pennsylvania.

Clergy matters

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

ORSMA (Office for Review of Sexual Misconduct Allegations)

Cindy Heise's report as Coordinator will give you a picture of ORSMA's current caseload and activities. We are grateful to have regular consulting on all cases from Dr Albert Rossi (a licensed psychologist), Robert Koory (legal counsel) and Bernard Wilson (professional investigator.)

SMPAC (Sexual Misconduct Policy Advisory Committee)

SMPAC continues to meet monthly via teleconference to review cases and consider policy and procedure questions. SMPAC members include Metropolitan Tikhon (episcopal moderator), Fr John Jillions (chair) Cindy Heise, Fr Alexander Garklavs, Pdn Peter Danilchick, Fr Eric Tosi, Dr Albert Rossi, Bernard Wilson and Robert Koory.

Seminaries and Theological Education

Together with Metropolitan Tikhon, I serve on the boards of St Herman, St Tikhon's and St Vladimir's Seminaries and on the Board of Theological Education (BTE). The BTE members also include His Eminence, Archbishop Michael; His Eminence, Archbishop Irénée; Archpriest John Dunlop (St Herman Seminary); Archpriest Chad Hatfield (St Vladimir's Seminary) and the dean of St Tikhon's Seminary. Archpriest Kirill Sokolov, the Director of Diaconal and Late Vocations, serves as the BTE secretary. The BTE reviews applications put forward by bishops of candidates who have come through the Diaconal Vocations Program or some formation program other than an accredited Orthodox seminary. The BTE recommendations are then sent to the Holy Synod for a decision at their Spring or Fall meeting.

The BTE also looks at broader questions concerning the state of the seminaries and theological education. While previous Metropolitans and All American Councils have addressed the question of creating a unified system of theological education, the goal has proven elusive in the past. Metropolitan Tikhon now has this as one of his three "enduring goals" for strengthening the spiritual life of the Orthodox Church in America.

To form the most comprehensive and unified North American system of Orthodox Christian theological education, firmly rooted in the patristic, scriptural and liturgical tradition of Holy Orthodoxy and serving as the backbone of our Church schools, our seminaries, and our adult continuing education programs.

The OCA and Orthodox Unity

As this is my last report as chancellor, I would like to turn to some general considerations about the OCA's history and direction. Metropolitan Tikhon has emphasized that we need to reacquaint ourselves with our history in order to remind ourselves about who we are, how we got here and what contribution we can make to world Orthodoxy.

As we approach the 50th anniversary of the OCA's autocephaly, this continues to be a stumbling block in inter-Orthodox gatherings, most significantly the Holy and Great Council which took place in Crete in June 2016. Our bishops were not invited to this important pan-Orthodox gathering, so our 222 years of experience as a church in America were missing from the discussions. I say this as a simple fact, though also conscious that there is frustration about this among our bishops, clergy and faithful. On the other hand, it is also a fact that in the background there is a constant effort to build good relations with other churches, working with them at whatever levels are possible.

Things would be different if we had been satisfied fifty years ago with remaining under a Mother Church overseas—as *all* other Orthodox churches here still are. But our forbears had the vision of an Orthodox Church rooted in and for North America. The OCA would be the seed, they hoped, for a grass-roots American Church that would in time bring together all the Orthodox bishops and the various ethnic jurisdictions into one. This would conform to the wise ecclesiology of the Orthodox tradition—one church in one place—but would also help fulfill our mission to reach out not only to immigrants of traditional Orthodox backgrounds, but to seekers in North American society. While we are in communion with the other Orthodox Churches our autocephaly was misunderstood from the beginning and remains so. Indeed, the very issue of autocephaly is still so radioactive that it was removed from the agenda of the Great and Holy Council. (See Appendix 2: “The Tomos of Autocephaly: Forty-Six Years Later”.)

The late sociologist Peter Berger (a friend of Fr Alexander Schmemmann) followed the goings-on of Orthodoxy with some interest and wrote an essay in 2016, only a year before his repose: “Eastern Orthodox Cacophony in America.”

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

While the OCA may well share Berger's diagnosis and prescription, it's clear that we have a long way to go for a cure. This is not about pumping ourselves up by blaming

others. On the contrary, the Orthodox tradition teaches that we should blame ourselves first. We as the OCA are equally subject to parochialism and ecclesiastical idolatry. At a recent consultation on the OCA's external relations one of the participants noted that we are often guilty of acting "holier than thou" when it comes to relating to the other Orthodox and to the community at large. "We need to train our clergy and laity to *engage* in their communities, with the city hall, the police, the legislatures and so on. Are we 'holier than thou'? Are we about the 'purity of Orthodoxy' and thus cut ourselves off from relationships outside our parishes?"

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

"To radiate the humility, peace and love of Jesus Christ to our surrounding culture"

This is one of Metropolitan Tikhon's enduring goals for our relations with others (Pillar III.) In July 2017 I heard Bishop Paul speak very frankly at the FOCA convention in Chicago about our mission in North America. He said that we as Orthodox often talk about "baptizing the culture," but when it comes to North America with its varieties of cultures—ethnic, political, social, religious, age-related—we haven't even begun to first understand what we're dealing with. This means that we need to do a lot more listening before we can just go out and baptize that culture. In fact, if we don't do more listening, we will find that many in this mixed set of cultures will just dismiss us out of hand. Bishop Paul did not underestimate the difficulty of listening, especially to views that conflict with Orthodox tradition, but he said "we need to get out of our comfort zones and listen to what people are saying"—even our own people—if we really wish to do the apostolic work of the gospel. The news is not all bad: if we listen closely we will find opportunities, since Orthodox Christianity at its best can respond to the deepest spiritual longings of many who have given up on religion and life.

In closing this report I want to express my gratitude for being given this opportunity to serve the Orthodox Church in America as Chancellor. I will treasure many memories from these years. And I pray that the words of Psalm 37:5, which inspired St Innocent, will guide the OCA in years to come: "Commit your way to the Lord, trust in Him, and He will act."

Appendix 1

The Tomos of Autocephaly: Forty-Six Years Later

<https://oca.org/news/headline-news/the-tomos-of-autocephaly-forty-six-years-later> [April 7, 2016]

SYOSSET, NY [OCA--Archpriest John Jillions]

April 10, 1970 is the day that the Orthodox Church in America received the official proclamation ["Tomos"] granting autocephaly from the Russian Orthodox Church. From then on, the OCA had the freedom to order its own life, both internally and in relation to the other Orthodox Churches around the world. However, to this day the precise meaning of the OCA's autocephaly has continued to be a source of controversy in the Orthodox world. Indeed, this is a much bigger issue than just the OCA. The very question of what autocephaly means and who has the authority to grant autocephaly remains charged and unsettled, and for that reason could not be included on the agenda of the Great and Holy Council to be held in June of this year. Thankfully, in spite of disagreements over the precise status of the OCA as an autocephalous Church, Eucharistic communion has been preserved, and for that we can be grateful even as we continue to discuss how to resolve the issues of autocephaly and the fragmented state of Orthodoxy in North America.

The history recounted below is a completely revised, updated and abbreviated version of an article I wrote for the Tenth anniversary of autocephaly in 1980, which appeared in the February and March editions of *The Orthodox Church*, edited at that time by the late Protopresbyter John Meyendorff, one of the architects of the OCA's autocephaly.

On April 10, 1970, the Holy Synod of the Russian Orthodox Church proclaimed the autocephaly of the "Metropolia." Five weeks later, the official Tomos of Autocephaly, signed by all the Russian bishops and stamped with the Patriarchal seal, was handed over to the delegation of the new Autocephalous Orthodox Church in America. What had begun in 1794 as the remotest mission of the Russian Church was now added to the list of fourteen other Orthodox autocephalous churches.

Tremendous confusion over the meaning and implications of this act made it an issue of bitter contention among the various jurisdictions of the Orthodox Church operating in America. The Moscow Patriarchate saw autocephaly as a simple declaration that its mission in America — which for 50 years had been living in de facto autonomy — was now independent, officially and canonically. The motivation to grant autocephaly to one branch of Orthodoxy here was to bring contemporary Orthodox life in step with its canonical tradition and its historical past in America. Autocephaly was viewed as a step toward the full realization of having one bishop in one district and being a local, i.e., American, Church — the ecclesiological and canonical norm of Orthodoxy. Other jurisdictions, however, beginning with the Ecumenical Patriarchate, considered this a rash claim to exclusive jurisdiction, granting a title and rights that are "disproportionate

with reality” without consultation with the other jurisdictions that have staked a claim in America.

At the outbreak of the 1917 Bolshevik Revolution that ultimately led to the de facto break with the Moscow Patriarchate, the Metropolia already had more than 100 years of history in North America, and not only in Alaska. There were 320 parishes across the US and Canada, half of which came about as a result of the return of Eastern Rite Catholics (“uniates”) in the missionary work started by Saint Alexis Toth in 1892. The directory of parishes in 1918 includes Arabic, Albanian, Serbian, Greek, Romanian and Bulgarian parishes. This is in addition to the many parishes that were mainly Russian, Galician and Carpatho-Russian. There was a clear sense even then that the Mission in North America could embrace the variety of Orthodox peoples under one ecclesiastical head—“One bishop in one place,” according to the Orthodox principle.

To better understand what led to the proclamation of autocephaly in 1970, it is important to remember that the “Metropolia,” as the OCA was then called, had been living in a canonical limbo since the 1920s. Because of the “Soviet captivity” of the Russian Church, the Metropolia was fairly bold about its claims to de facto canonical autonomy. Nevertheless, regularization of its status was desirable not only to settle its own inner life, but equally to help move toward the realization of Orthodox unity in America. By the 1960s, the internal state of affairs of the Metropolia was stable enough for it to consider options for resolving both its ambiguous status vis-a-vis Moscow and the blatantly uncanonical pluralism of jurisdictions.

The founders of the OCA’s autocephaly saw the step in 1970 as a temporary measure until the time of that a full autocephaly could include all the Orthodox jurisdictions in North America. The main question in the late 1960s was how to regularize our own status vis-a-vis the Russian Orthodox Church, which at the time was still very much oppressed by the Soviet government. Autocephaly answered that dilemma. But it was equally understood that the OCA’s autocephaly was a step along the way to the full unity of the Orthodox Church in North America.

In retrospect, there were three routes that could have been taken as the Metropolia contemplated how to regularize its canonical status.

1. The Metropolia could seek the patronage of the Ecumenical Patriarchate of Constantinople. But at the time, the Ecumenical Patriarchate believed that the Metropolia should return to its Mother Church, the Moscow Patriarchate. In 1965, the Patriarch of Constantinople had dissolved its Russian Exarchate in Western Europe (since restored) on the grounds that conditions were now “normal” in the Soviet Russia and that Russian Churches in the West should submit to Moscow.
2. The most radical solution would have been to declare the Metropolia autocephalous on its own authority. Many of the modern autocephalies in fact began this way, with formal recognition coming years after the de facto break.

Clearly, this was not in the interests of a peaceful resolution to the problem of disunity in America.

3. The option that was canonically and practically most feasible was to negotiate with the Mother Church, but with the strict proviso that independence be swiftly given. Anything less would be returning to the past, a return which was unacceptable given the increasing heterogeneity of the American Church and the very different social structures under which the two Churches existed at that time—keep in mind that this was still the Soviet period. A return to the Mother Church purely and simply would only have added another jurisdiction to the already jurisdiction-bound Church in America — one more tacit agreement to the status quo of multiple jurisdictions.

The Metropolia's reconciliation with the Moscow Patriarchate began as early as 1961, with informal talks between representatives of Moscow and the Metropolia at the Assembly of the World Council of Churches in New Delhi, India. It was understood that autocephaly was an accepted goal. By 1963, negotiations had been formalized, but the initial talks were inconclusive. They resumed again only in 1968, and this renewed effort was a decisive step forward.

The negotiations were not kept secret, and the rest of the Orthodox world was informed. But there was a swift and unexpected reaction from Constantinople. The letters of the Ecumenical Patriarch to Moscow were adamant: only an Ecumenical Council, or at the very least the Patriarch of Constantinople himself, has the right to grant autocephaly. The subsequent back-and-forth correspondence is extremely valuable for pinpointing the difficulties raised by the negotiations. (*The Saint Vladimir's Theological Quarterly* 15:1-2 is a special issue devoted to the OCA autocephaly and includes the correspondence between the Patriarchs of Moscow and Constantinople plus other articles and documents. This was also published separately as *Autocephaly*, SVS Press, 1971.)

At the center of the dispute was the very term “autocephaly.” Each side was interpreting the term in quite different ways. To Constantinople, “autocephaly” implied first of all that the OCA was claiming exclusive jurisdiction in America, that it was the only legitimate Orthodox Church in America. For Moscow, the term “autocephaly” had none of the implications that Constantinople claimed it did. Autocephaly meant essentially that the Church, which was formerly under its canonical authority, was now independent. In other words, the whole process of granting autocephaly was “an internal matter of the Russian Orthodox Church.” In contrast, expressing the fear of the Greek Churches, Archbishop Iakovos stated, “They will seek the gradual coercion of others, or the actual subjection to them of all Orthodox churches in America when they believe possible” [Letter to the Patriarch of Antioch, May 1970.] For Moscow, however, there was no question of “interfering in the affairs of other sister Churches, having their own branches in America” [Patriarch Alexis to Patriarch Athenagoras]. There was a great deal of misunderstanding over the 1970 autocephaly because they were not talking about the same thing.

It is important to remember that autocephaly was not granted simply for the purpose of forming another permanent jurisdiction. The OCA claims, therefore, that while it does not encroach upon the rights of other jurisdictions, its autocephaly was granted as a basis for unity pending agreement between all Orthodox Churches in America—and possibly, a final approval of a future ecumenical council. The Church must be unified but also, as Metropolitan Ireney wrote in 1966, it must be “a local, permanent American Church, bound for all time with this land and with this people.”

3. Office of Review of Sexual Misconduct Allegations (ORSMA) & Sexual Misconduct Policy Advisory Committee (SMPAC)

Office of Review of Sexual Misconduct Allegations (ORSMA)

Membership

Ms Cindy Heise, LMSW, *Coordinator*; Fr. John A. Jillions, *Chancellor and Director*; *Consultants*: Dr. Albert Rossi, *NYS licensed psychologist and consultant*; Mr. Robert Koory, Esq., *legal counsel*; Mr Bernard Wilson, *Chief of Police, retired and consultant*

Mandate

The Office of Review of Sexual Misconduct Allegations is responsible for assisting the Holy Synod of Bishops and the Church with matters concerning allegations of sexual misconduct. The Office shall be under the authority of the Office of the Metropolitan, who shall report to the Holy Synod of Bishops. ORSMA shall be supervised on a day-to-day basis by the Chancellor of the Orthodox Church in America.

Initiatives and Projects Since the 18th All American Council

Major activities of ORSMA Coordinator 2015- 2018

1. Obtained Certified Facilitator credential for the Darkness to Light: Stewards of Children sexual abuse prevention training program and instituted training church wide, paid by the OCA for volunteers working with youth.
2. Facilitated annual staff and student training at St. Vladimir's and St. Tikhon's Seminaries on the PSPs and best practices for prevention.
3. Coordinated online trainings of Stewards of Children.
4. Conducted an in-depth workshop with the Holy Synod in 2016 which included case studies with the goal of improving overall response to reports of sexual misconduct and to identify early warning.
5. Developed the Clergyman in Crisis protocol to assist clergy who have been accused of or found to have committed sexual misconduct with the goal of either reinstatement into active service or appropriate disciplinary action.

6. Centralized background check process.
7. Focused on achieving 100% compliance with PSPs from dioceses, parishes and church institutions.
8. Joined the Pastoral Life Department to address issues of prevention. Conducting interviews of clergy wives concerning their experience in ministry and specifically to address challenges such as burnout.

Conclusion

Since 2014, the Church's response to sexual misconduct has improved a great deal. Response is uniform, methodical, and unbiased. Overall, incidence of reports has decreased as well. Despite the current low number of cases, however, there will always be a need for ORSMA. As our process continues to evolve and be refined, we may eventually move to more of a diocesan led response to misconduct while maintaining the OCA level Office to provide guidance, consultation, and assistance. The ORSMA will continue to maintain a central repository of sexual misconduct cases and allegations and be the primary advisor along with SMPAC to the Holy Synod and Dioceses concerning the Policies, Standards, and Procedures on Sexual Misconduct.

While the work of ORSMA is extremely important, it is even more critical that we focus on the prevention of misconduct. In nearly every case, it was evident that misconduct was only a symptom of a much deeper problem. More than half of the cases involved alcohol addiction. Several clergy also struggle with mental illness, most often depression and anxiety. Isolation and marital conflicts were also found to be a contributing factor. This is why the care of clergy and their families is so important.

Sexual Misconduct Policy Advisory Committee (SMPAC)

Membership

Metropolitan Tikhon, *ex officio*; Fr. John Jillions, *ex officio*, Chancellor, Chair; Fr. Eric G. Tosi, *ex officio*, Secretary; Cindy Heise, *ex officio*, *Social Worker and Coordinator, ORSMA, Secretary of SMPAC*; Mr. Robert Koory, Esq., *legal consultant*; Fr. Alexander Garklavs; Protodeacon Peter Danilchick; Dr. Albert Rossi, *NYS licensed psychologist*; Mr. Bernard Wilson, *Chief of Police, Retired*

Mandate

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

Authority, Responsibility and Supervision

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

Background

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

Duties

1. Provide advice on how to improve both the content and effectiveness of the Church's revised *Policies, Standards, and Procedures on Sexual Misconduct*.
2. Assist in reviews of the extent to which the Church's revised *Policies, Standards, and Procedures on Sexual Misconduct* are implemented in practice and how compliance with them is ensured.
3. Assist in finding and nominating qualified professionals, who would be called on to do investigations when occasions arise.
4. Assist in developing increased and improved training for clergy, Church employees, and applicable laypersons to enable a better understanding of their duties under the revised *Policies, Standards and Procedures on Sexual Misconduct*, including their mandatory reporting obligations under various state laws.
5. Assist in any other requests for advice made by the Holy Synod of Bishops and the Office.

Initiatives and Projects Since the 18th All American Council

1. Monthly 90-minute teleconference (biweekly until March 2016) to review cases, policy questions, plans for meeting with and reporting to Holy Synod and Metropolitan Council.

2. Reports to the Metropolitan Council and Holy Synod meetings twice per year (usually with one or more SMPAC members participating.)
3. Extensive interviews with bishops concerning PSPs, ORSMA and SMPAC.
4. Refinement of background check process and procedures.
5. Revisited the issue of length of investigations (e.g., number of Response Team members, coordinating schedules, workflow, cooperation of respondent and/or complainant, etc.)
6. Extensive discussion on the Sacrament of Confession and the reporting of sexual misconduct/abuse based on background paper prepared by Fr Alexander Garklavs and submitted to the Holy Synod.
7. Review of annual PSP diocesan compliance reports.
8. Led day-long Holy Synod workshop June 2016:
 - Review of cases and their handling (with role plays)
 - Consolidation of lessons learned
 - In-depth review of compliance reports
 - Review of training programs to prevent misconduct
 - Review and revision of PSPs and ORSMA practices
 - Integration with canonical procedures.
9. Creation and refinement of "Clergy in Crisis Protocol."
10. Initial discussion on the future direction of SMPAC and ORSMA after the 2018 AAC:
 - Changes should be made with care. It has taken much time and collaboration to form the current SMPAC and ORSMA personnel and structure.
 - Find a way to have more interaction with the Holy Synod.

4. Job Description of the Secretary

Supervisory and Job Controls

Is assigned areas of responsibilities and scope of decision-making but relies on the Secretary as an expert on managerial and administrative matters and holds the Secretary accountable in assigned areas. Discusses progress and major issues with other members of the Administrative Team for coordination and input. Follows legal and regulatory guidelines as well as the Best Practices and Policies for Financial Accountability of the OCA/Keeps the Metropolitan informed of non-routine issues and decisions. Work is assessed in terms of overall accomplishments, timeliness, and responsiveness to the needs of the Church, within assigned areas.

Major Duties

1. Serves as the primary administrative manager of the OCA. Performs or directs the following
2. Maintaining the legal status of the OCA. Implements and assures compliance with Federal, State, and local statutes and other relevant regulatory requirements.
3. Supporting the Church's Councils and Synods. Serves as team leader for planning and logistics of All-American Councils. Records or arranges for recording of the activities of the Holy Synod and other Councils. Attends meetings and maintains minutes files.
4. Collecting, analyzing, summarizing, preserving, and serving as repository for the OCA's official records and materials, including its Archives. Provides reports and other information to the Holy Synod, Metropolitan Council, Legal Advisory Board, Commission on Canons and Statutes, Canonization Commission, and other persons and entities, as required or requested.
5. Guiding and directing the work of the Department of History and Archives. Assists in development of goals and objectives, oversees progress against goals, provides direction when necessary, assures appropriate coordination, and resolves problems that transcend the Department's' scope.
6. Serves as a voting member of the Metropolitan Council.
7. Serves as the officer of the Church responsible for assuring regular ongoing communication between the Metropolitan and his executive staff and for communication among the members of the executive staff. Records objectives and goals established in joint officer and officer/Metropolitan meetings including timelines for their accomplishment. Records progress

against jointly established timelines and goals as part of regular meeting agendas.

8. Directs the administrative, housekeeping, estate management, and personal service functions of the OCA Central Administrative Offices. Functions supervised include human resource management, including benefits administration and personnel investigations; correspondence and records management; support to boards and councils; information technology; travel arrangements; and facilities maintenance. Establishes policies and procedures, supervises staff, and assures compliance with legal, regulatory and established best practice guidelines. Supervisory duties include assigning work, reviewing progress, accepting or rejecting results, evaluating performance, and resolving on-the-job problems.

Performs Other Duties as Assigned

Job Requirements

1. Proven executive and management skills and knowledge of a wide variety of non-profit management principles and practices.
2. Thorough knowledge of the structure, traditions, and key personnel of the Church.
3. Ability to express and present information, ideas, and conclusions clearly, concisely, and forcefully both orally and in writing.
4. Proven ability to work effectively as a team member.

5. Report of the Secretary

Archpriest Eric George Tosi

“To these questions there exists no answer in the form of practical ‘recipes.’ ‘It all depends’ on thousands of factors – and, to be sure, all faculties of our human intelligence and wisdom, organization and planning, are to be constantly used. Yet – and this is the one ‘point’ we wanted to make in these pages – ‘it all depends’ primarily on our being real witnesses to the joy and peace of the Holy Spirit, to the new life of which we are made partakers in the Church.”

Protopresbyter Alexander Schmemmann from “For the Life of the World”

Introduction

I cannot help but reflect back on my ten years as Secretary of the Orthodox Church in America and my fifth All-American Council. When I first agreed to take this position as Secretary of the Orthodox Church in America, we were in a time of challenges and even uncertainty. We progressed through this time, as a Church, and came through on the other side and now enter a period of relative stability. It was not always easy but it allowed us, as a Church, to reflect on what it means to be the Church, more specifically, the Orthodox Church in America. For this and this alone we should all be grateful for the experience as I know I am for my time at the Chancery. As I reflect on this time, I cannot but help to thank the many people who labored selflessly to stabilize the Church. Some of them have reposed and much of their work will go unknown except by a few who were involved with them during this time. Others are well known and continue to work for the Church to this day. To all of them we owe a debt of gratitude. God always sends us exactly what we need, not always what we want, but what we need.

Among the first, deep gratitude must go to His Beatitude Metropolitan Tikhon whose wisdom, patient leadership, deep faith and inexorable good humor allows all of us who work with him to truly feel we are cared for, listened to and led. I have witnessed him reestablish the integrity of the Church and the Office of the Metropolitan. He has done so with the highest integrity and humility. He is seen worldwide as a true leader and, what is perhaps most important to him, a true monk. I am extremely thankful to be working for and with him.

I also must thank my fellow Officers and co-workers, Archpriest John Jillions, Protopresbyter Leonid Kishkovsky, Melanie Ringa, Judge. E.R. Lanier, the Chancery staff and the many, many people I come into contact with on a daily basis. The members of the Holy Synod with whom I speak to on almost a daily basis, the Metropolitan Council with whom I work closely with, and all those who work for the Church. I must thank my ever-loving wife and children who patiently endure the missing hours I am away from them. I thank all of them for their patience, their friendship and their support.

A General Overview of the Position of Secretary of the Orthodox Church in America

As stated in the job description, the Secretary of the Orthodox Church in America serves as the primary administrative manager of the OCA. His functions include maintaining the legal status of the OCA, supporting the Church's Councils and Synods and serving as team leader for planning and logistics of All-American Councils. This also includes collecting, analyzing, summarizing, preserving, and serving as repository for the OCA's official records and materials, including its Archives, and providing reports and other information to the Holy Synod, Metropolitan Council, Legal, and the host of Boards, Commissions and Departments and Institutions of the Church. The Secretary also serves as the officer of the Church responsible for assuring regular ongoing communication in the Church. The Secretary serves as a member of the Metropolitan Council.

Among his other duties are directing the administrative, housekeeping, estate management, and personal service functions of the OCA Central Administrative Offices. This comprises human resource management, including benefits administration and personnel investigations; correspondence and records management; support to boards and councils; information technology; travel arrangements; and facilities maintenance. The Secretary also establishes administrative policies and procedures, supervises staff, and assures compliance with legal, regulatory and established best practice guidelines.

In addition, the Secretary's position has evolved to include managing all communications efforts of the Orthodox Church in America including the OCA website, official publications, official statements and serving as spokesman for the Church when directed. Included in this work, the Secretary is a primary member of the Crisis Management Team which addresses specific issues that arise when related to Church work that may involve public relations or responses on specific situations and incidents which affect the entire Church. This also includes coordination of efforts between the Central Church and the Diocese on specific communication matters. There are a host of other additional duties which arise when delegated such as representing the OCA or the Metropolitan at events and meetings which have critical importance to the life of the OCA.

How has the Secretary Contributes to the "For the Life of the World"

All the public reports of the Officers, Boards, Commissions and Departments are posted on the OCA website following the Metropolitan Council meetings in the Spring and the Fall. Much of the work of the Church, particularly the Central Administration, is detailed in these reports and can be accessed for more insight into the activities since the last All-American Council. In addition, numerous press releases detail the various meetings and initiatives of the Church and provide an additional insight into the multifaceted work at the Chancery. However, such reports do not always capture the massive amounts of background work, coordination, administrative and logistical challenges that occur on a

daily basis. This, combined with the reduced staff means that many of the staff work in many varied areas that are outside of the original scope of their position. Highlighted here are some specific points generalizing the work since the last Council.

Administrative: The position of Secretary calls for the maintaining the status the Central Church administration. The current staff consist of eight full time employees, seven part time/stipended employees, one contract worker and one volunteer. Some of the employees hold several positions within the organization or are employed elsewhere such in the Church or a secular position. Of these employees, five work off site. There is expected to be a reorganization of positions after the All-American Council as the Central Administration continues to work on finding the most effective manner of operating the Church within the current budget constraints.

The Chancery relies on many part-time/stipended employees and volunteers in its operation. Most of them perform many duties beyond their responsibilities with a small full time staff to oversee or do the actual work. For example, the Communications Team, which is managed by the Secretary, consists of two part time employees off site and a contract employee off site. Another example is ORSMA which is managed by the Chancellor and has one part time employee off-site and several volunteers who assist in their areas of expertise. Supervising all of this work is the Metropolitan, assisted by the Standing Synod and in conjunction with the Holy Synod and Metropolitan Council.

All employees have a job description and their performance is reviewed annually by the Officers. There is a handbook for guidance and strict policies on best practices (every employee and member of the Holy Synod and Metropolitan Council is required to sign best practices documents annually). These are, in turn, overseen by both the Human Resources Committee and Internal Governance Committee of the Metropolitan Council. All employee records and files are examined by the Internal Auditors and have received excellent reviews. There are electronic timesheets which are reviewed annually by the auditors.

A major project that continues is the reestablishment of the central database for all clergy records. This is an ongoing project that was complicated by the need for a new server which was installed last year. The ultimate goal of the new database is for it to be accurate, feed into the OCA website (whereas presently multiple entries are needed) and for the Chancery to be able to generate reports on different requests such as awards, ordination date, clergy status, etc. As such a team of individuals worked through this project specifically identifying and recreating the necessary background, data feed, and reporting procedures which would allow the database to be an invaluable tool for Chancery operations. While the project is not yet complete, it is being done in phases on a very tight budget. It is expected to be completed over the next year. Much thanks must go to Barry Migyanko, executive administrative and Ryan Platte, technical manager, for their many long hours in working through this project. The final result will be a streamlined centralized database which can feed information to and from the Chancery, the dioceses and the website. All clergy and parish records will be in a secure and tightly restricted database that can be utilized in a variety of ways including

mailings, tracking of stewardship, generation of reports and analysis of critical Chancery operations. The ultimate goal is to enable the individual dioceses to be able to update and access the information for their own use. The servers and other technology required to control such operations as the website and the various databases are on redundant, exclusive systems with multiple off-site back-ups and up-to-date security and protection.

Communications and Website: When the communications aspect of the OCA was transitioned to the Office of the Secretary, there were a few goals that were set. First was to be timely AND accurate so that everything that was posted on the OCA website was official, since it is the official communication organ of the OCA. Many of the official statements were cleared by the Metropolitan and the Holy Synod, sometimes in conjunction with the Legal Team and the Crisis Management Team. This ensured accuracy on the official position of the Church. This sometimes delayed postings but it was the considered opinion that this was necessary in those circumstances. There were many late nights reviewing official statements for one final check before posting. However, for more ordinary postings, the web team has posted material far in advance of any other outlet and has a goal of a new post every day, which has been met consistently. The second goal was that the website should represent the whole of the OCA in a responsible manner. Those people who do read the OCA website (it is read in over 50 countries by hundreds of thousands of people) do so to get the news and the flavor of the Church. Our info@oca.org email address gets questions from around the world as an electronic source of information on Orthodoxy. The third goal was to make sure that the website responds to the needs of the Church so that people can actually use it and get a response. For this reason we are present on all social media platforms (which are closely monitored) and have a responsive and well trained team.

The last redesign of the website was done in 2011 and since that time the website has grown stale and outdated. The Communications Team embarked on a new redesign for the website in 2017 with the goal of not a complete overhaul but rather to give it a new design, easier navigation and search functions and to update the backend software. We recommissioned the company that did the refurbish in 2011 and working in conjunction with His Beatitude and a team, decided on the new design. Since we had a limited budget, much of the back end work is being done in house and according to a workable time table. It is expected that the new refurbished website will be released this summer. The website will continue to set the standard for websites for Orthodox Churches throughout the world as the official organ of the Orthodox Church in America.

Continued thanks must go to the communications team of Fr. John Matusiak, Jessica Linke and Ryan Platte. They really do work above and beyond even though they are part-time. Reporting of the news is timely and accurate and the team often works late into the evening and on weekends to address sudden demands. We owe them a debt of gratitude for their good work. It is sometimes questioned why so many people actually are involved with press releases and website operations. The reason is twofold: first there is a clear hierarchy of posting, Fr John writes them, team reviews them, Jessica posts them and if some technical aspect is needed (like a video) Ryan handles that. Our record posting is under a minute so we are quite efficient. The second reason is for accountability. We must be accurate and we must ensure that nothing slips through so

we have a few eyes on the posts. It protects all those involved and it is actually quite an efficient system.

As was reported numerous times, *The Orthodox Church* and the *Sourcebook* are no longer printed. This was primarily due to the cost of printing such items which could not be justified with the reduced budget. The Chancery fully understood the value of having a printed item in the hands of the Church members and looked at alternate publications. The *Orthodox Review* was one of the results of this examination. It is now published monthly (in color and in black and white) and posted online for parishes and individuals to download and print. Individuals can also subscribe to the publication and will automatically be sent it each month. The *Orthodox Review* is a monthly recap of the main stories featured on the OCA website. Likewise, other manners of electronic communications including targeted emails from the Metropolitan's Office also go out on a daily basis due to the good work of ADN Joseph Matusiak. The annual Church Calendar will still be printed and sent to all clergy free of charge (we have consistent donors for this item). Other publications such as the revised Protopresbyter Thomas Hopko's Series on the Church has been released. Other projects include an updated history of the OCA and the so called "Red Book" are being planned for the 50th anniversary of the autocephaly of the OCA. The new Metric Books is now available at the St. Vladimir's Bookstore booth and can be purchased through SVS Press. This was a wonderful cooperative effort between the Chancery and St. Vladimir's Press.

Church Councils and Meetings: As the Secretary of the Orthodox Church in America, I am responsible for organizing most every meeting whether it be the Holy Synod, Metropolitan Council or the host of committees, commissions and boards. I am directly responsible for putting together the agenda for these meetings, reviewing every set of minutes and maintaining the files. Every meeting has a multitude of logistical planning issues that must be worked through. There are meetings almost every week at the Chancery, whether in person or telephonically. These can often extend late into the evenings or on weekends. But the operation of the Church depends on these meetings. I am assisted by very competent staff members and volunteers. Every meeting requires planning, scheduling, logistical organization and smooth operations followed by the writing, publishing and filing of minutes. I personally review every set of minutes with the exception of the private Holy Synod minutes. These meetings can be very time-consuming because of the level of detail and sometimes require travel to off-site meeting spaces.

The most important of these is the triennial All-American Council for which I have immediate oversight. I have been greatly assisted by a very competent Preconciliar Commission for the present Council (Chaired by His Grace Bishop Paul), Council Manager (Dn. Peter Ilchuk), and local committee (chaired by Fr. Timothy Sawchak and Bob Butchko). So much gratitude must be given to them for their tireless work and countless hours spent in planning and organizing this Council. We began this process over two years ago and worked through so many issues including site selection, contract negotiations, interface with the various committees, agenda planning and report preparation. Each step was well organized and done with a real sense of conciliarity. The success of this Council is due to the many hours dedicated to planning

and organizing it. One may not realize the many details that need to be addressed from menus, to the liturgics to even selecting the colors of the table cloths. Each detail was addressed and completed on schedule despite a few bumps.

There are many hours dedicated to the planning and running of the Holy Synod and Metropolitan Council. As such, I am the main interface and planner for the meetings. The agenda, minutes, assignment and collection of reports as well as the dissemination of the material is critical to effective meetings. These meetings are planned well in advance and material disseminated in plenty of time for review. They are intense days for the staff but very effective in the continuing operation of the Church.

I also serve as the Chancery liaison for many of the committees. So countless hours are also spent in attending meetings on a range of areas. The Church operates through these committees which are often staffed with devoted volunteers and need the dedicated work of the Secretary to organize them. Very often, my week is taken up by meetings which are essential for the operation of the Church. Many of these meetings have been reported on the website both in press releases and the posted reports of the meetings. It is well worth the time to look through these and come to understand the multifaceted and varied scope of these meetings. Such meetings would include a varied group ranging from departmental focus groups and meetings, meetings with visiting dignitaries and Church officials, and annual meetings of committees.

Archives: Perhaps the most exciting development in the Archives is the complete refurbishment of the facilities. The basement of the Chancery has been utilized for many years as the repository. It was looking old, leaked water, was unconditioned and basically a poor storage facility. The Archive Committee chaired by Matushka Tamara Skvir, met to examine what could be done with the current Archives. She took over the chair after the repose of Alexis Troubetskoy who led the Committee in an exemplary manner. Every option was placed on the table and discussed with cost and time factors taken into consideration. The primary goal became stabilizing the conditions. Numerous Experts were contracted and examined the facilities and offered recommendations. Numerous tests and reports were done and ultimately the Committee decided that the only viable option at this time was to refurbish the existing facility, not only for the sake of the Archives but the building as a whole. Thankfully, the Orthodox Church in America had an Archives bequest totaling over \$200,000. It was recommended by the Committee that this money be released and used for the renovations. The Metropolitan Council unanimously approved this request and the Holy Synod blessed the project to move forward.

The OCA contracted a local architect familiar with the local situation as well as experienced in renovations of older buildings. Engineers and architects were brought together to formulate a design for the renovations. There were a few obstacles that needed to be resolved (anyone familiar with such projects would not be surprised) such as the approval of the Fire Marshal and the City of Oyster Bay on the technical aspects of the project. A complete blueprint has been submitted and we are waiting for the final approval of the project. Once this is complete, we will be selecting a general contractor

and begin the work. A brief overview of the work is that there will be trenches dug around the outside of the building and the walls waterproofed both inside and outside. The walls, ceiling and floors will be refurbished, a new internal HVAC system will be installed along with new fire doors and egress. A proper fire suppression system will also be installed along with other stabilizing elements. Finally, the offices will be moved so that there will now be a new archivist office, assistant office and a reading room. Access to and from the Archives will be restricted and the strictest Archives standards will be enforced to ensure the preservation of this invaluable asset of the Church.

The future goals of the Archives is to seek grants and donations to digitize the Archives so that scholars from around the world can have access to the material. Other plans include obtaining new collections and publicizing the contents of the Archives on the website with weekly articles.

A special note of thanks should be made to Fr. Daniel and Tamara Skvir who have donated many long hours over the past year combing through the archives, working on organizing and assessing them so that they are more accessible. Many redundant or questionable material was deaccessioned from the collection. A new Archives Record Retention Policy was also published as well as new guidelines on the operation of the Archives. Alexis Liberovsky, the OCA Archivist, continues his work not only in the Archives but also in giving presentations on the OCA, the collection and the history, around the world.

Estate Management: Another responsibility of the Secretary is the managing of the estate on which the Chancery building stands. The Chancery sits on 14 acres with a large building that serves as the Chancery offices, Pension Board offices and a residence for the Metropolitan. The building was given to the OCA in 1950s for a total cost of \$1. It represents the only property owned by the OCA as an entity. It is difficult to see how the OCA could ever acquire anything close to it on today's market. While it does need some cosmetic repairs, the building itself is structurally sound.

Due to some timely bequests, the Metropolitan Council was able to designate part of them for the general upkeep of the Chancery as well as some deferred maintenance. With this we have been able work on some of these with others in progress over the summer. A major project was the replacement of 20 windows in the Chancery which were in poor repair or broken. However, because of the warranty on the windows they were all replaced for no cost. There are still four windows that need to be replaced which are not under warranty which be completed this summer. Another major project was the replacement of the roof which was well over 20 years old. This was accomplished in phases and there is now a new roof and gutters on the building. The remainder of the third floor was painted and repaired as we slowly move those rooms into guest rooms and living quarters for staff. We were able to clean out a sizeable portion of the attic and have plans to complete this over the next few months. There is new carpet being installed in the foyer, stairs and hallways as the older carpet was faded and in disrepair. Other projects include repair work on the electricity, lighting,

plumbing, furnace and heating system. We expect to replace the front and back door of the building which are old and do not properly seal.

The grounds receive regular maintenance with the lawn and the back part of the property. A portion of the driveway was crumbling and we had that replaced with a Belgium block border to prevent further crumbling. The landscaping is being updated and maintained especially before the annual St. Sergius celebration in September. Unfortunately, the property lost a number of trees during the recent storms, some which are irreplaceable 100 year old large Linden trees. There is new signage and lighting for the entrance. The building will be power washed in the next few months.

On the whole the property is in decent shape and remains a wonderful headquarters for the Church. The inside is maintained by a full-time housekeeper whose duties extend far beyond just cleaning. She often works late nights when meetings are going on and maintains so much of the building.

It may be asked what the building actually contain since many people have never visited the Chancery. The basement consists of the archives and storage rooms. It also houses one of the computer servers. The main floor has a wonderful chapel with the relics of many saints. This chapel, dedicated to St Sergius of Radonezh, is the heart of the work at the Chancery and provides a place of worship for a small community that regularly attends there. There is also a sitting room, two meeting rooms, a solarium, a dining room, a kitchen, file and copy rooms. The sacristy is housed off the kitchen. The second floor has the Metropolitan's apartment which has a kitchen, dining room, living room, bedroom and office. There are eight offices including a large office of personal files, and another formal sitting room. These are all occupied by the staff and the Pension Board. The top floor contains one occupied bedrooms as well as three guest bedrooms and attic storage space. All together the space is well provided with the exception of a place for large meetings (we utilize a nearby seminary or hotel meeting room if needed). There are also gardens and pathways which have been restored over the past three years. It is a beautiful setting, under an hour from major airports and a fitting place to meet dignitaries and visitors.

Legal and Insurance: One of the requirements of the Secretary is to be the liaison with the OCA General Counsel, and the Metropolitan Council Legal Committee. An excellent working relationship has developed and many important legal issues have been addressed. These issues can range from questions on Federal Non-Profit status, New York State corporate law to issues of civil or criminal law. All of these require consultation and decisions. The Legal committee has worked through these issues in a very competent and professional manner and it is an honor working with them. There have been a number of lawsuits through the past years and they have been systematically and competently addressed. There have been a number of in-depth meetings on legal issues. All contracts and agreements continue to be vetted. It should be noted that the good work of such as the OCA General Counsel Judge E.R. Lanier and others have been invaluable to the Church and our gratitude cannot be expressed adequately. I work with Judge Lanier on a daily basis. We worked extensively on the

Sincerely Held Religious Belief Statement, the Corporate Gift and Bequest Policy, the Vendor Relationship Policy, the Employee Gift Policy, Employee Travel Policy and we are beginning work on a Policy and Guidelines for Social Media. All of these policies strengthen the position of the Church in relationship to the secular world and minimizes liability. The General Counsel and I work closely with different entities in the Church on legal matters including ORSMA case reporting, insurance matters, Statute and incorporation issues, and the many legal matters that arise in the course of the work of the Church

Part of the Secretary's duties is to maintain the integrity of Orthodox Church in America as a non-profit corporation. As such, I maintain all of the 501 (C) 3 documents for subordinate entities of the Church. These are updated annually and reviewed by the Internal Revenue Service. Recently, I have worked in conjunction with the Pension Board to ensure that all parishes contributing to the Pension Plan are registered as a subordinate entity of the OCA as required by the Pension policy. I can report that this is complete and all files are in compliance. I receive requests for letters of determination on an almost weekly basis and assist many parishes in ensuring their compliance. I also ensure that the workplace is in full compliance with Federal and New York State Employment law.

Another area of responsibility is to oversee the insurance of the Orthodox Church in America. We are currently covered by Guide One Insurance (and Travelers for some employment issues). I have worked closely with Michael Herzak and Insurance Systems. We complete annual reviews of our needs and adjust as appropriate. We also participate in specific Orthodox programs that provide proper insurance for over 250 of our participating parishes. Another responsibility is to offer timely reporting of potential legal issues to the insurance company which will ensure that we are covered in the case of lawsuits. I am happy to report that we have been very successful in this over the past three years and have had no difficulty with coverage. There were some missing gaps in our insurance when I first came on and we have since filled those to provide more complete coverage. I also assist parishes on finding a good insurance carrier for their situation and have handled many requests in this regard.

I also sit on the board of the Orthodox Health Plans, a pan-Orthodox group that manages a combined health insurance program. The OCA is the second largest group on the plan. We review the policies and costs each year and make recommendations on adjustments. This is becoming increasingly difficult due to major cost increases over the past two years. Continued participation in this plan is in question and alternative insurance options for our clergy need to be considered seriously and quickly. For some parishes, the cost of insurance is more than the salary for the clergy. I am able to refer some to different (but a shrinking number of) carriers and provide references for them. We have also been looking into providing all clergy of the OCA with life, disability and long term care insurance. We are very much behind in such protection for our clergy and their families. I also manage the Personal Assistance Program (PAP) which we have with Magellan. This program ensures that all clergy and their families have immediate access to confidential counseling when in need.

Other: The Synodal Chancery now provides background checks for all seminarians being ordained as well as a host of other qualified people who are working for or with the Chancery. Working in conjunction with Cindy Heise of ORSMA, we have been able to standardize the system for all of the dioceses through *Protect My Ministry*. I am a member of SMPAC and work with the Committee on policies affecting maintaining and reporting such matters. Each year, I consolidate and present a report on the status of compliance on the Policies, Standards and Procedures (PSP) for presentation to the Holy Synod. This benchmarks the progress of compliance in each diocese and the Church as a whole. I also present the latest census and metrical numbers for the Church to the Holy Synod.

I also manage the awards for the Church. I ensure that the proper grammotas, St. Romanos medal, and St. Innocent medal are prepared and distributed. We recently had to reorder the awards and are set for the next few years. I am also working with the Office of Military Chaplains to recast the Chaplain Cross which fell out of use a number of years ago. Over 25 of these crosses will be awarded to our military chaplains who honorably served and retired. I also manage the distribution of the Chrism, antimimension and relics to the hierarchs.

At the request of St. Vladimir's Seminary, I manage and teach the Seminary Internship Program for the OCA seniors. This included revamping the program, assigning the interns, meeting with mentor priests and interns and a monthly meeting and course of instruction with the interns. This, we believe, makes it a top line internship program and is in line with other jurisdictions where the Central Church has a stronger involvement in the development of the clergy. I also served as the Assistant Professor of Liturgics at the Seminary teaching practical liturgics to second year students.

I also have had the honor of representing the Orthodox Church for the Scouting movement on a national and international level. As such I represent the position of the Orthodox Church in such matters and have been the chaplain for some major events. I was the Assistant Chief Chaplain for the World Jamboree and the National Jamboree and will be the Chief Chaplain for the upcoming world and national Jamboree. I work with the national BSA organization to ensure that Orthodox interests are represented. In addition, I advise the Eastern Orthodox Committee on Scouting.

I have also represented the Orthodox Church in America on a number of initiatives and programs relating to the topic of evangelism. I was able to participate and deliver papers in such areas as the Lausanne Orthodox Initiative, Overseas Mission Leadership Forum, the American Society of Missiologists, WCC/NCC Evangelism Forum, the Fellowship of St. Albans and St. Sergius, the Diocese of Sourozh, to name a few. The highlight of this work has been the director of annual Mission School that has been held over the past three years. I continue to accept, with His Beatitude's blessing, speaking engagements on evangelism throughout the United States and the world and have had some wonderful opportunities to speak in such places as Madrid, Spain, Helsinki, Finland, Arusha, Tanzania, Cambridge, UK to name a few.

Conclusion

Archbishop Anasastios of Albania wrote in his Book, *Mission in Christ's Way* a very insightful observation. He wrote, "The world 'outside' the Church – that mission field *par excellence* – is inconceivably complex. One must be constantly drawing new maps and staying alert to new developments. Such mission also demands creative thinking about how best to execute and make viable the apostolic idea within each context....The mission of the Church must keep a clear horizon to 'all nations,' without exception. In geographical terms, those who lie 'outside' the Church may be close at hand, or far away, but neither can be ignored for reasons of ease. Apostleship is the obligation of the 'whole' Church and there is no justification for focusing solely on those who belong to our nation or resemble ourselves. The field of responsibility and action is the whole world and that cannot change. The Lord's commandment is" 'Go into all the world and preach the gospel to the whole creation.' (Mark 16:15)

My ten years as Secretary of the Orthodox Church in America has convinced me of the complexity of the world. The Church is constantly confronted with changes and challenges and must consistently address these challenges in the context of the eternal Church and Her teachings. In a small way, my task is to assist the Metropolitan, the Holy Synod, the Metropolitan Council, indeed the entire Church in addressing these complexities while maintaining the teachings and order of the Church. But it is a task I have taken on with creativity, energy, joy and love for the Orthodox Church in America. I have fallen short in some areas but I do believe that the OCA is more stable and again reaching out to the fallen world. May God continue to bestow His blessings on this Church.

I apologize for anything that I may have left unsaid in this report. I am grateful for the leadership of His Beatitude and the Holy Synod in their leadership of the Church and for their vision for the future of the Church. We have many more challenges and complexities before us but as Fr. Schmemmann states it all depends, "on our being real witnesses to the joy and peace of the Holy Spirit, to the new life of which we are made partakers in the Church."

6. Office of History and Archives

Mandate

The Office of History and Archives promotes the ongoing development of the historical legacy and vision of the Orthodox Church in America as an essential element of the Church's Mission, and endeavors to assure proper preservation and accessibility of the historical record of Orthodox Christianity on the North American continent.

The Archives of the Orthodox Church in America (OCA) is the official repository for the inactive records of the Central Church Administration, documenting the All-American Councils, the Holy Synod, the Metropolitan Council, dioceses, monasteries, seminaries, parishes, clergy, departments, boards, commissions, and a variety of external and internal matters affecting the Church.

Additional collections preserved with the inactive records of the Central Church Administration include some 100 sets of personal and institutional archives of hierarchs, clergy, lay leaders, and Church-related entities; as well as photographs, films, videos, computer discs, and other media; periodicals; Church-wide, parish and other directories, anniversary and historical publications; and artifacts from throughout the world.

These rich and unparalleled historical collections include original documents handwritten by the North American Orthodox saints and documentation chronicling the history of Orthodox Christianity in North America dating back to the Alaskan mission in 1794.

In order to fulfill its mandate, the Office of History and Archives:

1. Maintains and develops the Archives of the Orthodox Church in America (inactive records of the Church administration) located at the OCA Chancery in Oyster Bay Cove (Syosset), NY, while also collecting and preserving a variety of other materials and resources of historical importance.
2. Provides reference and documentary research support to the Holy Synod of Bishops, chancery staff, and other administrative bodies of the Church.
3. Assists dioceses, parishes, and institutions in their historical research on their own communities.
4. Assists scholars from around the world in their academic research on the history of North American Orthodoxy
5. Provides consultative services to dioceses, parishes and institutions in conjunction with the development of local archives and proper preservation of historical records and endeavors to address instances throughout the Church

where valuable archival material is improperly preserved or even in peril of destruction or disposal.

6. Produces occasional historical publications.
7. Reviews, edits or writes material on the OCA and North American Orthodoxy for the massive Orthodox Encyclopedia currently being published in Russia and for a variety of other publications.
8. The OCA Archivist regularly delivers lectures on historical topics or presentations on archival issues
9. Fosters historical knowledge and awareness throughout the Church.

Individuals and groups are welcome to visit the OCA Archives to familiarize themselves with the collections or to conduct research on a particular topic. Historical questions may also be directed to the OCA Archivist by e-mail, phone, fax or mail. Donations of historically valuable material are gratefully accepted.

Membership

Office of History and Archives: Alexis Liberovsky, OCA Archivist / Director, Office of History and Archives

Archives Advisory Committee:

Ex officio Members: Metropolitan Tikhon, Synod Liaison; Archpriest John Jillions, OCA Chancellor; Archpriest Eric Tosi, OCA Secretary; Melanie Ringa, OCA Treasurer; Lisa Mikhalevsky, Metropolitan Council Liaison

Members: Matushka Tamara Skvir, Chair; Archpriest John Erickson; Archpriest John Perich; Archpriest Vladimir von Tsurikov; Matthew Garklavs; Dr. Jurretta Heckscher; Alexis Liberovsky, Committee Secretary; Daria Safronova-Simeonoff; Gregory Shesko; Dr. Anatol Shmelev

Consultants: Sergei D. Arhipov; Dr. David Ford; Dr. Scott M. Kenworthy; Eleana Silk Popadija Kitty Vitko

Initiatives and Projects Since the 18th All American Council

Office of History and Archives:

In addition to the ongoing tasks listed above, highlights of the activities of the Office since the 18th All-American Council include:

1. Among the lectures delivered by the Archivist on historical or archival topics, typically with an accompanying slide presentation, in OCA parishes and institutions as well as other venues, the most notable since the 18th All-American Council were:
 - a. A paper presented in Russian at a conference in November 2017 at the Moscow Theological Academy marking the 220th anniversary of the birth of Saint Innocent and the 40th anniversary of his glorification titled *“Saint Innocent, Apostle to America: Preparation for His Canonization and His Legacy in the New World”*, which was also presented at St. Catherine’s OCA Representation Church in Moscow.
 - b. Presentations at the Sitka National Historic Park, and in conjunction with the Annual St. Herman Pilgrimage in Kodiak, as well as at other venues in Alaska, in August 2017, to mark the 150th anniversary of the sale of Alaska to the US, titled: *“The Orthodox Bishops of Alaska and their interactions with US Presidents 1867-1917”*.
 - c. The 8th Annual Saint Alexis Toth Lecture at Saint Mary’s Cathedral, Minneapolis, MN (see: <https://oca.org/news/headline-news/remembering-metropolitan-leonty>), titled *“Metropolitan Leonty (Turkevich): The Minneapolis Connection.”* (see: <https://oca.org/history-archives/remembering-metropolitan-leonty-the-minneapolis-co>).

Such presentations witness to the rich historical and archival legacy of the Orthodox Church in America to diverse audiences.

2. Notable among visitors to the OCA Archives from around the world in the last three years were officials from the Ministry of Foreign Affairs of the Russian Federation who came in May 2016 to see the Church’s Archives and to discuss possible cooperation in studying and preserving Russia’s historical legacy in the United States (see: <https://oca.org/media/photos/russian-government-officials-visit-oca-archives>). They were impressed by the wide range of priceless historical material preserved by the Orthodox Church in America. As follow-up to this visit, in November 2017, the OCA Archivist met with the Director of the State Archives of the Russian Federation and other officials in Moscow for exploratory discussion about the possibility of future cooperative projects, in particular, exchange of archival material of mutual interest.

Plans, Initiatives and Projects for the Future

Future projects and initiatives of the Office of History and Archives envisioned for the next triennium include:

1. To continue expanding historical content on the OCA website. A dedicated website for the Office of History and Archives is also being contemplated to provide more online resources to a broader audience, including greater accessibility to the OCA Archives through online finding aids, as well as tools to assist dioceses, institutions and parishes in the preservation of their own archives.
2. To further develop inventory databases and finding aids of the collections in the OCA Archives.
3. To investigate funding and to research methods for digitization and/or microfilming of the collections of the OCA Archives, particularly film, video and audio recordings, due to their limited shelf life.
4. To update the booklet *“A Commemorative List of the Departed Servants of Orthodoxy in North America (Diptychs of the Deceased),”* which last appeared in 2002, and to publish it on the OCA website, where it could be readily updated as needed in the future.
5. To identify and explore opportunities for collaborative historical and archival work with other Orthodox Churches in view of joint projects in historical research for the upbuilding of Orthodox unity and a common historical vision, along with supporting each other to strengthen archival preservation efforts.
6. To increase the visibility of the rich resources of the OCA Archives throughout the Church and also within secular academia as a witness of the Holy Tradition of the Orthodox Church to the world at large.
7. To complement with historical content and archival material the missionary and educational outreach of the other Church ministries.

Initiatives and Projects Since the 18th All American Council

Archives Advisory Committee

In 2013, the Metropolitan Council mandated the establishment of a committee to assist the Archivist in studying the housing needs of the OCA Archives and in developing solutions. As a result of this decision, the Archives Advisory Committee was formed.

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

In fulfillment of its mission statement, the major activities of the Committee's work in the last three years included:

1. At the Fall 2015 Metropolitan Council meeting, the Committee requested and received funding for consultants to evaluate conditions in our current facility.
2. The *Archives Facilities Conditions Assessment* was conducted after scheduling delays, by consultants Ernest Conrad, an environmental engineer, and Dr. Gregory Galer, a paper conservator, in April 2016. In mid-June, their extensive report was received and distributed to the members of the Archives Advisory Committee.
3. A recommendation of the report that was immediately implemented was the purchase of three digital data loggers for accurate monitoring of temperature and humidity. The loggers were funded by gracious donations from Committee members.
4. In late November 2016, the Committee held a productive meeting (see <https://oca.org/news/headline-news/archives-advisory-committee-concludes-third-meeting>), focused principally on discussion of the *Archives Facilities Conditions Assessment* report and remediation of current conditions in the Chancery basement in order to improve the preservation environment in the OCA Archives. Acknowledging that the Archives cannot be adequately preserved in the basement in the long term, the Committee discussed several options for the Archives' eventual relocation to an appropriate facility to ensure their preservation for future generations. The meeting also projected digitization of film, video and audio recordings as a priority, due to their limited shelf life.
5. Pursuant to that meeting, planning and cost estimates were explored of possible interim remediation measures in the current basement facilities in order to improve preservation conditions until a new appropriate facility can be built onsite or the archives are relocated elsewhere. Also, ongoing work to deaccession extraneous items in our collections, mostly multiple copies of church publications, continued.
6. Following the determination by legal counsel that the terms of the McGuire Family Charitable Remainder Trust allow the use of its proceeds to fund renovation of the current facilities of the OCA Archives in the basement of the Chancery building, the Metropolitan Council adopted a resolution in early 2017 to approve such funding, which then received the blessing of the Holy Synod. After obtaining a death certificate for Mr. McGuire, the proceeds (~\$210,000) from the trust were received by the OCA Treasurer in May 2017. Contracts were then signed with both structural engineering (Simpson, Gumpertz & Heger) and architectural (Smiros & Smiros) firms to develop plans for the renovation work, which have now been completed. Additionally, a consultant, Gregor Trinkaus-Randall, was hired to assess the current setup of the OCA Archives and to

advise on the packing and storage of the archive collections during renovation, as well as space allocation and usage in our facility after renovation. He visited in mid-June 2017 to view our facility and to meet with some of the Committee members, and submitted a written report in early July 2017.

7. As of the writing of this report in March 2018, preparation for storage of our collections during renovation is continuing while permits for the renovation work are being obtained.
8. Consistent with the Committee's recommendation to enlist interns and/or volunteers in the OCA Archives, the OCA Archivist has since 2015 annually applied for an intern through a summer internship program at Adelphi University. The program matches students, who are paid by the university, with nonprofit organizations. A history major intern in this program assisted the Archivist during the summer of 2015. While no interns chose to work in the OCA Archives in 2016 and 2017, hopefully, a suitable intern in this program will emerge for the summer of 2018.

Much gratitude is due to the members of the Committee for their enthusiasm and willingness to volunteer their time and professional expertise and to contribute funds to further the crucial preservation of the Church's archival legacy. In particular, special thanks are due to Matushka Tamara Skvir and Gregory Shesko who have volunteered their time to work tirelessly alongside the Archivist to sort and organize unprocessed material and to prepare our collections for temporary relocation during renovations

In January 2017, The Committee mourned the repose of its chairman, Alexis Troubetzkoy, who skillfully guided the Committee's work for more than three years since its creation in 2013 and chaired its meeting less than two months before his repose. May his memory be eternal!

With the consensus of Committee members, His Beatitude, Metropolitan Tikhon appointed Matushka Tamara Skvir as the new chairperson of the Committee.

Conclusion

The Office of History and Archives can derive much inspiration to enhance its work from the 19th All-American Council theme "For the Life of the World", the study document *Of What Life Do We Speak? Four Pillars for the Fulfillment of the Apostolic Work of the Church* authored by His Beatitude, Metropolitan Tikhon and the topics of the six forums to be held during the Council. The Office of History and Archives will continue to strive for good stewardship of the historical legacy of the Church in the preservation of her priceless archival documents and in fostering awareness of the Church's history, in order to strengthen Her evangelical efforts.

Scripture calls us to remember those who came before us. A critical element in the process of discernment of the Church's vision for the future must be historical reflection

and understanding, which must continually be cultivated and developed throughout the Church going forward. This will not only serve to maintain unity in the Church, but strengthen her vision going forward. Such awareness of the Church's story builds among the faithful and those seeking the truth in Orthodoxy a unified historical identity that will enable the vision of the Orthodox Church in America as the local territorial church on this continent to be fully realized. The Office of History and Archives will strive to continue developing such essential historical awareness throughout the Church.

Authentic historical understanding requires study of primary source documents and other significant historical materials, which presumes proper preservation and organization for easy access of these documents and other materials. In support of the Church's Mission at the local level in the coming triennium, the Office of History and Archives will seek to more actively assist dioceses, institutions and parishes in their archival preservation efforts of their own historical records.

The continued prayers and support of the hierarchs, clergy and faithful are respectfully requested for the work of the Office of History and Archives and the Archives Advisory Committee in archival preservation, and historical witness and interpretation for the Church.

7. Job Description of the Treasurer

Supervisory and Job Controls

Is assigned overall area of responsibility, to wit, financial management of the OCA, and discusses with the Treasurer priorities, sensitive issues, and expected results. Within those constraints, the Treasurer proceeds independently, keeping the Metropolitan informed of extraordinary events. The Treasurer conducts financial activities in keeping with the Best Practices and Policies for Financial Accountability of the OCA. The Treasurer serves as administrative liaison on the Finance Committee of the Metropolitan Council. The Metropolitan does not generally review work in progress, but reviews major financial reports and decisions because of potential for far-reaching impact on the OCA.

Jon Summary

Serves as the Chief Financial Officer of the OCA. Ensures the effective execution of its Best Practices principles and policies for non-profit financial accountability and works closely with the Metropolitan Council to assist them in their financial governance responsibility. Implements and maintains internal controls for the protection of assets and reliability of financial statements. Develops plans and projections linking strategic goals and measurable objectives. Manages budgeting, auditing and reporting systems. Represents and is the primary advisor to the Metropolitan on financial management.

Major Duties

1. Manages OCA budgeting, expense management and financial accounting activities. Develops and administers, for all funds, an accounting and budget system consistent with the information and reporting requirements of internal and external agencies and provides responsible stewardship to the Metropolitan Council and donors. Following discussion with the Finance Committee, prepares the annual operating budget and submits it for the Metropolitan Council's approval. Oversees execution of the approved budget. Manages cash flow, directs transfer of assets, and controls line items of expenses for accomplishment of the Church's missions. Assists Department Chairs in presenting their annual funding requests. Coordinates development and secures approval of capital budget. Monitors the budgets of capital projects
2. Oversees all aspects of income development, e.g., income from diocesan assessments, special appeals, Fellowship of Orthodox Stewards, endowments, grants, gifts, trusts, and investments. Directs fund raising encourages and oversees development and growth of endowments, and provides for the investment and management of endowment funds. Reviews reports from investment managers of long-term assets and, with the Investment Committee,

evaluates performance of investments and, as appropriate, reallocates assets. Ensures that all fund raising is within the context of Christian stewardship practices, Best practices and policies of the OCA, including the Donor Bill of Rights.

3. Performs a variety of on-going financial activities typified by the following:
 - Submitting financial status reports to the Holy Synod of Bishops, Metropolitan Council, and general membership.
 - Developing and maintaining primary banking relationships, cash management systems, and credit arrangements.
 - Insuring financial transparency and providing for regular independent audits.
4. Supports and/or guides and directs the work of the Office of Development and Stewardship. Assists in development of goals and objectives, oversees progress against goals, provides direction when necessary, assures appropriate coordination, and resolves problems that transcend individual organizations' scopes.
5. Provides reports and other information to the Metropolitan Council's Audit and Investment Committees, as required or requested. . Ensures full cooperation with the OCA's internal and external auditors. Works closely with the Finance Committee for effective and complete reporting to the Metropolitan Council.
6. Serves as a voting member of the Metropolitan Council.
7. Supervises a small staff engaged in financial support activities. Sets goals, assigns work, reviews progress, and evaluates performance.

Job Requirements

1. Well-rounded knowledge of financial and business practices, methodology, and procedures including compliance requirements of government regulatory agencies.
2. Thorough knowledge of the financial structure of the OCA.
3. Ability to consult and advise on sensitive and important financial management issues.
4. While not a pre-requisite, the possession of a Master's degree or equivalent in accounting, business administration, management, public administration, finance or a related field is desirable.
5. Possession of CPA certification or demonstrated equivalent in education and experience is desirable.

8. Report of the Treasurer

Melanie Ringa

Thank you for the opportunity to address the 19th All-American Council and to present this report. The three years since we last met in Atlanta have flown by, and much of my focus has been on the transition from head tax to proportional giving and the challenge of adequately funding the needs of the administration on decreasing diocesan support based on the funding formula adopted by this Council three years ago.

My report will cover three main areas:

1. An overview of where we were financially in 2015 and the events that have transpired from 2015 through 2018.
2. Funding the Work of the Central Administration; how has the transition from “head tax” to a proportional based method of funding the Church worked?
3. Continuing the Work of the Central Administration with a continuation of the proportional giving model through the next All-American Council.

Before we begin the more detailed review, here are a few of the highlights of the last three years:

Did you know.....

- The OCA continues to be blessed by the generosity of our people who have bequeathed just under \$300K to the Church in the last three years. The bulk of these bequests are unrestricted, and we use these funds for special projects that are **NOT** covered within our operating budget. These projects include a website redesign that is currently in progress; major repairs in Syosset including roof replacement, replacement of windows, carpeting and the front door, and renovation of the apartment in Moscow that is the residence for our Rector of St. Catherine's.
- In 2017 the OCA received funding in the amount of \$211K from a trust established for the purpose of providing housing for the Archives of the Church. These funds are being used to renovate space at the Chancery to adequately house the archives.
- The Central Administration has continued to host the diocesan chancellors and treasurers at annual meetings for the last three years since the 18th AAC in Atlanta. The meeting held on January 23, 2018 was the 7th Annual Meeting.

- The “Fellowship of Orthodox Stewards” (FOS), re-instituted in 2013 under the new moniker “Stewards of the OCA” (SOCA), continues to grow, although slowly. The revenues generated in 2014 were just over \$34K and have doubled to \$69K raised in 2017. This appeal helps fund the work of the Departmental Ministries (Youth, Education, Liturgical Music, Chaplaincy, Missions, Christian Service and Humanitarian Aid, and Late Vocations).

Part One. An Overview of Our Finances from 2015 through 2017

Condensed Balance Sheets updated through December 2017 (Exhibit A)

Exhibit A contains Condensed Balance Sheets for the years 2008 through December 31, 2017. The information for the years 2008 through 2016 was taken from the audited financial statements, and the information for 2017 is preliminary, as the external year-end audit is in progress at the time this report is being written.

In looking at our balance sheet, a review of the historical information indicates that our net worth reached a low of \$470,506 at the end of 2009. The surplus that we experienced in 2010 brought us back to \$983,642, however the “unrestricted” net asset balance was a deficit of \$843,460 at the end of 2010. From 2011 through 2014, our “unrestricted” net assets worked their way out of the deficit and to a surplus of \$130,516 by 12/31/17, due to small operating surpluses and in large part to the unrestricted bequests received. Our Temporarily Restricted Net Assets increased from \$808,026 in 2010 to \$1,993,650 at the end of 2017, due mainly to the receipt of the Missions Bequest in 2011 and to the investment income in 2016 and 2017. Other notable information on the balance sheet:

- Receivables of \$274,447 at 12/3/17 represents diocesan support for November and December, received in early 2018.
- Cash of \$342,912 at 12/31/17 includes the Archives funds of \$211K plus several other bequests received in 2017.
- The loans payable of \$43,246 at 12/31/14 to the Diocese of the South (\$21,198), along with an auto loan payable of \$22,048 on the 2014 Subaru Outback purchased for use by Metropolitan TIKHON were completely paid by early 2016.
- Retirement Obligation of \$38,000 represents a payment in lieu of pension to a former chancery employee who retired in 2007.

Condensed Statement of Activities through December 2017

To complement our understanding of the financial picture from 2015 through 2017, I have included a condensed Statement of Activities, **Exhibit B**. The 2008 through 2013 numbers are audited numbers by Lambrides, Lamos, Taylor LLP.; the 2014 numbers

are audited by Capin Crouse LLC; the 2015 and 2016 are audited by D'Arcangelo & Co, LLP, and the 2017 external audit currently underway is also with D'Arcangelo.

- Diocesan assessments have *decreased* from 2015 to 2017 (\$1.911 million in 2015 vs. \$1.797 million in 2017) by \$114K, or 5.9%, due to the change from the “head tax” to proportional giving. ***However, this actual decrease was lower than the anticipated decrease when the new methodology was accepted at the 18th All-American Council.*** The expected decrease was \$173K.
- Fellowship of Orthodox Stewards contributions reached a low of \$10,080 in 2012. Re-instituted in 2013 as “Stewards of the OCA”, it raised \$34,628 in 2014, which has grown to \$69,135 in 2017.
- Under General Contributions, the various unrestricted bequests account for the major portion of the \$29,311 in 2015, \$86,551 in 2016 and \$177,407 in 2017.
- Misc Other in 2015-2017 includes mainly revenues from the Office of Continuing Education’s workshops, the Department of Liturgical Music Online Choral Conducting Classes and the Diaconal Vocations Program. The revenue from these programs is used to fund the work of those offices/departments.
- Total annual revenues have fallen from \$3.1 million in 2008 to \$2.573 million in 2010, to \$2.103 million in 2017.

Here are other notable highlights from our Income Statements from 2015 through 2017:

- General Administration expenses (other than Legal, Accounting and Other Professional Fees) were reduced from \$2,223,011 in 2008 to \$1,660,524 in 2014. These expenses increased slightly through 2017 as we added a full time secretary to the Metropolitan in mid-2016.
- Program and Ministry funding was cut from its high of \$668,509 in 2008 to a low of \$131,472 in 2010. For the period 2015-2017, these programs have received increased funding, averaging \$228,787 annually and funded with SOCA revenues supplemented from operating revenues. The budget for 2018 includes \$222,784 for these programs (including Church Planting Grants), with \$182,784 funded from Operations.
- The Mission Bequest has been “board restricted” by the Metropolitan Council, with the earnings designated for use in the Missions and Evangelism program. For 2015-2017, these funds were used for a one-week Mission School held each summer with representatives from every diocese in attendance.

In order to complete the picture, following is a condensed statement of cash flows which further illustrates the cash position of the OCA over the last three years. The Income Statement does not present a complete picture of our cash flow. Principal payments on

our debt are not reflected on the Income Statement. The Statement of Cash Flows includes these principal payments on our debt.

Condensed Statement of Cash Flows

	<u>2015</u>	<u>2016</u>	<u>2017</u>
Change in net assets	\$(93,432)	\$279,609	\$331,411
Adjustments to reconcile change in net assets			
to net cash used by operating activities:	144,674	162,479	(2,925)
Net cash provided/(used) by operating activities	51,242	442,088	328,486
Net cash from/(used by) investing activities	(728,708)	(530,640)	(67,273)
Net cash provided by/(used by) financing activities	(24,983)	(16,499)	0
Net increase/(decrease) in cash	(702,449)	(105,051)	261,213
Cash and cash equivalents, beginning	889,199	186,750	81,699
Cash and cash equivalents, ending	186,750	81,699	342,912
Unrestricted			
Cash.....	\$98,191	\$161,791	\$43,011

Exhibit C contains a chart and graph of staffing level and total compensation versus the total budget for the years 2006 through 2018. Since 2015 we have added 1.5 staff with the hiring of a full time secretary to the Metropolitan along with part time legal counsel.

Exhibit D lists all of the central administration positions, with the 2015 staffing level and total cost as compared with our current 2018 staffing and personnel costs by position. The increase in staffing has resulted in additional cost of \$64,729 annually, or 6.6%.

This completes the update of financial activities over the last three years since our meeting in Seattle.

Part Two. Funding the Work of the Central Administration - how has the transition from “head tax” to a proportional based method of funding the Church worked?

Exhibit E portrays the details by diocese for the final five years under the “head tax”, 2011 through 2015, along with the 2016 and 2017 actual and 2018 projected diocesan support under the proportional giving method as adopted in Atlanta in 2015. As a reminder, the Finance Resolution took dioceses whose 2015 assessment was greater than the 46% average to a rate starting at a maximum of 50% in 2016 and decreasing by 2% annually to 46% for 2018, with those dioceses at or below 34% remaining at 34% for the triennium. For the non-territorial dioceses, the resolution called for the

Archdiocese of Canada and Diocese of Alaska to remain at the 10% tithe for the next triennium, with the agreements for the ethnic dioceses to be re-negotiated by the Holy Synod.

The transition from “head tax” to the proportional funding method has been fairly smooth with quite a lot of work being done at the diocesan level. Most of our dioceses either have, or are in the process of, transitioning from a dues based system to some type of proportional or tithing method. The actual decrease in funding to the Central Administration has not been as severe as projected (decrease of \$125K in 2016-17 versus the projected decrease of \$173K.). This decrease has been absorbed and balanced budgets maintained through the increases in Stewards of the OCA funding, budget reductions in the legal and audit fees, employee benefits and telecommunications areas. We are also starting to see growth in several of the dioceses so that while their giving % remains the same, there is an increase in the actual \$ remittances to the Central Administration. This is gratifying as it is the premise behind the elimination of the head tax and reduction in proportional giving rates; the funds remain and are put to use locally to achieve growth.

At this Council you will be asked to approve a funding formula for the work of the Central Administration for the next three/four years. The resolution that was recommended and approved by both the Metropolitan Council and the Holy Synod continues the existing formula by continuing to reduce the annual rates for those dioceses currently at rates higher than 34% by 2% annually, not to fall below 34%.

Exhibit E-1 includes the giving by diocese from 2015 (final year of head tax), the three years under the current finance resolution (2016-2018), and projects this out for the quadrennium, 2019-2022. By the end of 2022, all territorial dioceses with the exception of the West and South, will be at a rate of 38%, with the West and South remaining at 34%. This same spreadsheet is projected out another two years to show that ALL territorial dioceses will be at the same 34% rate by the end of 2024.

Exhibit F is a Recap of Expenses by Category, showing Actual 2015, 2016 and 2017 and Budget 2018 figures. As you see, for 2018, Salaries, payroll taxes and benefits represent 53% of our total budget, with Departmental Programs (including Planting Grants) at 10%, Travel, lodging and conferences are also at 10%. The Property Expenses, another 8%, are fixed, and cannot be significantly reduced unless a decision is made to sell the property and relocate the offices elsewhere. Replacing the projected \$193K in reduced diocesan support from 2019-2022 will require a combination of increased focus on fundraising through the Stewards of the OCA program, along with continued assessment of personnel, programs, travel and the basic work done by the administration. However, as this projection is a conservative one based on **no growth** in the dioceses, I **TRUST** that we will continue to experience growth in many of our dioceses and that this growth will translate into increased support at all levels of the Church. As a very wise missionary priest recently told me, **TRUST** is not a feeling or an intuition. It is an act; a decision to say **YES**. In 2015 in Atlanta we said **YES** to finally moving away from the head tax to proportional giving. The formula was not perfect; the

dioceses were all at different stages in the stewardship. The result was that we have seen tremendous energy, dedication and hard work in a relatively short period of time to not only make the transition at the national level, but also at the diocesan level. It has been a joy to work with the diocesan Chancellors and Treasurers and to observe the exchange of ideas, methods, practicalities and pitfalls as they all joined together in this effort to foster stewardship and proportional giving in their parishes and dioceses.

Let us once again say **YES**. Let us continue the proportional giving methodology at the proposed levels from 2019 through 2022, with the goal of all territorial dioceses reaching the 34% rate by 2024. Then let us say **YES** by renewing our commitment to the Church; to work at all levels, parish, diocese, national, stavropegial, to carry the message and love of Jesus Christ to all.

Conclusion

It has been an honor to serve as the Treasurer of the OCA for the past eight years. I would like to thank my brothers and sisters in Christ at the Chancery (and those who work remotely) for their tremendous hard work, dedication and love. I would also like to thank His Beatitude, Metropolitan TIKHON, for his support. Thank you to the Metropolitan Council for their faith, love and support, especially those at-large members whose terms expire at this Council. To the Holy Synod, sincere gratitude for your attention to the funding of the work of the Central Administration and to the work you foster at the diocesan level to promote stewardship at all levels.

The Orthodox Church in America
Condensed Balance Sheet
For the Years 2008 - 2017

Exhibit A

AUDITED										Audit in Progress	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	
ASSETS											
Cash	\$ 430,904	\$ 360,761	\$ 464,805	\$ 744,298	\$ 939,806	\$ 930,189	\$ 889,199	\$ 186,750	\$ 81,699	\$ 342,912	
Accounts, Notes & Bequests Receivable	\$ 88,476	\$ 117,501	\$ 150,051	\$ 1,092,481	\$ 765,795	\$ 685,083	\$ 647,252	\$ 627,680	\$ 213,523	\$ 274,447	
Prepaid and Inventory	\$ 23,708	\$ 6,677	\$ 13,017	\$ 16,235	\$ 14,742	\$ 23,027	\$ 24,856	\$ 14,292	\$ 14,641	\$ 17,154	
Investments	\$ 1,640,669	\$ 1,446,382	\$ 1,378,306	\$ 1,189,570	\$ 1,129,770	\$ 1,053,631	\$ 1,147,590	\$ 1,793,909	\$ 2,580,141	\$ 2,647,414	
Land, building and equipment	\$ 396,942	\$ 344,491	\$ 319,387	\$ 323,922	\$ 291,271	\$ 259,762	\$ 296,887	\$ 265,495	\$ 234,104	\$ 248,751	
Total Assets	\$ 2,580,699	\$ 2,275,812	\$ 2,325,566	\$ 3,366,506	\$ 3,141,384	\$ 2,951,692	\$ 3,005,784	\$ 2,888,126	\$ 3,124,108	\$ 3,530,678	
LIABILITIES											
Accounts payable and accrued expenses	\$ 193,360	\$ 355,380	\$ 61,987	\$ 154,935	\$ 121,201	\$ 125,756	\$ 87,139	\$ 140,458	\$ 131,630	\$ 216,202	
Loans Payable	\$ 1,015,761	\$ 912,168	\$ 802,678	\$ 684,212	\$ 59,616	\$ 35,925	\$ 43,246	\$ 18,263	\$ 1,764	\$ -	
Deferred Revenue (AAC Assessments)	\$ -	\$ -	\$ 7,447	\$ -	\$ -	\$ -	\$ 52,966	\$ 8,442	\$ -	\$ -	
Deferred Comp/Retirement Obl	\$ -	\$ -	\$ -	\$ 48,819	\$ 68,250	\$ 54,178	\$ 47,710	\$ 47,203	\$ 40,637	\$ 38,000	
Annuity & unitrust agreements	\$ 624,254	\$ 537,758	\$ 469,811	\$ 368,114	\$ 286,014	\$ 184,321	\$ 134,035	\$ 126,504	\$ 123,212	\$ 118,194	
Total Liabilities	\$ 1,833,375	\$ 1,805,306	\$ 1,341,923	\$ 1,256,080	\$ 535,081	\$ 400,180	\$ 365,096	\$ 340,870	\$ 297,243	\$ 372,396	
NET ASSETS	\$ 747,324	\$ 470,506	\$ 983,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,640,688	\$ 2,547,256	\$ 2,826,865	\$ 3,158,282 (1)	
Total Liabilities and Net Assets	\$ 2,580,699	\$ 2,275,812	\$ 2,325,566	\$ 3,366,506	\$ 3,141,384	\$ 2,951,692	\$ 3,005,784	\$ 2,888,126	\$ 3,124,108	\$ 3,530,678	
(1) Unrestricted Net Assets (a)											
Temporarily Restricted Net Assets (b)	\$ (1,351,845)	\$ (843,460)	\$ (505,127)	\$ (505,127)	\$ 77,922	\$ 25,891	\$ 84,884	\$ 88,553	\$ 126,478	\$ 130,516	
Permanently Restricted Net Assets	\$ 795,606	\$ 808,026	\$ 1,595,124	\$ 1,595,124	\$ 1,506,421	\$ 1,502,372	\$ 1,529,106	\$ 1,429,257	\$ 1,669,036	\$ 1,993,650	
	\$ 1,026,745	\$ 1,019,075	\$ 1,020,429	\$ 1,020,429	\$ 1,021,960	\$ 1,023,249	\$ 1,026,698	\$ 1,029,446	\$ 1,031,351	\$ 1,034,116	
	\$ 470,506	\$ 983,641	\$ 2,110,426	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,640,688	\$ 2,547,256	\$ 2,826,865	\$ 3,158,282	

(a) In 2012 the OCA received an unrestricted bequest in the amount of \$460,000.

(b) In 2011 the OCA received a temporarily restricted bequest for Missions in the amount of \$969,000.

Orthodox Church in America
Condensed Statement of Activities
For the Years ended 12/31/2008 through 12/31/17

Exhibit B

	From 2011-2016 External Audit Reports										Audit in Progress
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	
INCOME											
Diocesan Assessments	\$ 2,538,076	\$ 2,453,710	\$ 2,404,989	\$ 2,304,772	\$ 2,281,079	\$ 2,001,762	\$ 1,943,943	\$ 1,911,410	\$ 1,783,502	\$ 1,797,731	
All-American Council	\$ 243,171	\$ -	\$ -	\$ 313,415	\$ 68,761	\$ -	\$ 50	\$ 340,334	\$ -	\$ 12,050	
Publications	\$ 36,152	\$ 12,053	\$ 7,704	\$ 3,117	\$ 1,095	\$ 2,390	\$ -	\$ -	\$ -	\$ 3,480	
FOS/Stewards of the OCA	\$ 23,221	\$ 135,704	\$ 44,453	\$ 22,519	\$ 10,080	\$ 60,435	\$ 34,628	\$ 51,784	\$ 64,731	\$ 69,135	
Charity	\$ 44,044	\$ 10,567	\$ 3,592	\$ 7,865	\$ 12,556	\$ 1,487	\$ 1,316	\$ 1,082	\$ 2,499	\$ 2,409	
Missions	\$ 50,703	\$ 38,975	\$ 59,198	\$ 972,359	\$ 5,251	\$ 27,618	\$ 3,599	\$ 1,608	\$ 3,997	\$ 2,820	
Seminary	\$ 53,101	\$ 2,239	\$ 4,708	\$ 1,689	\$ 1,199	\$ 27,144	\$ 10,363	\$ 17,740	\$ 3,465	\$ 2,410	
General Contributions	\$ 40,473	\$ 45,815	\$ 32,800	\$ 11,491	\$ 464,682	\$ 133,092	\$ 74,614	\$ 29,311	\$ 86,551	\$ 177,407	
Theological Education	\$ 6,050	\$ 560	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Yearbook & Calendar	\$ 1,191	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 435	\$ -	\$ -	\$ -	
North America Saints Project	\$ -	\$ -	\$ -	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Misc Other	\$ 63,032	\$ 31,354	\$ 15,484	\$ 17,810	\$ 4,353	\$ 66,195	\$ 30,734	\$ 30,007	\$ 31,687	\$ 33,521	
Donated Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 280,400	\$ 137,400	\$ 55,050	\$ 2,400	
Total Income	\$ 3,099,214	\$ 2,730,977	\$ 2,572,928	\$ 3,665,037	\$ 2,849,056	\$ 2,320,123	\$ 2,380,082	\$ 2,520,676	\$ 2,031,482	\$ 2,103,363	
EXPENSES											
Programs & Ministries (1)	\$ 668,509	\$ 246,885	\$ 131,472	\$ 198,262	\$ 247,094	\$ 235,290	\$ 320,072	\$ 238,694	\$ 234,080	\$ 213,587	
General Administration	\$ 2,223,011	\$ 1,893,918	\$ 1,662,908	\$ 1,766,474	\$ 1,705,558	\$ 1,905,717	\$ 1,660,524	\$ 1,679,756	\$ 1,632,755	\$ 1,710,135	
Professional Fees**	\$ 556,260	\$ 860,566	\$ 260,623	\$ 274,050	\$ 281,208	\$ 213,294	\$ 351,489	\$ 209,160	\$ 128,957	\$ 50,848	
All-American Council	\$ 243,647	\$ -	\$ 13,843	\$ 253,508	\$ 124,070	\$ 11,139	\$ -	\$ 364,080	\$ -	\$ 21,988	
Total Expenses	\$ 3,691,427	\$ 3,001,369	\$ 2,068,846	\$ 2,492,294	\$ 2,357,930	\$ 2,365,440	\$ 2,332,085	\$ 2,491,690	\$ 1,995,792	\$ 1,996,558	
Changes in Net Assets											
From Operations	\$ (592,213)	\$ (270,392)	\$ 504,082	\$ 1,172,743	\$ 491,126	\$ (45,317)	\$ 47,997	\$ 28,986	\$ 35,690	\$ 106,805	
Other Changes											
Interest and Dividend Income	\$ 45,085	\$ 10,278	\$ 8,524	\$ 2,954	\$ 9,511	\$ 6,397	\$ 10,515	\$ 748	\$ 19	\$ 40,188	
Realized & unrealized gains	\$ (690,304)	\$ (16,704)	\$ 531	\$ 3,172	\$ 11,240	\$ 20,376	\$ 47,339	\$ (68,837)	\$ 276,710	\$ 229,939	
Distributions (2)	\$ (22,283)	\$ -	\$ -	\$ (28,835)	\$ (16,000)	\$ (36,247)	\$ (16,675)	\$ (54,329)	\$ (32,810)	\$ (45,521)	
Total Other Changes	\$ (667,502)	\$ (6,426)	\$ 9,055	\$ (22,709)	\$ 4,751	\$ (9,474)	\$ 41,179	\$ (122,418)	\$ 243,919	\$ 224,606	
Change in Net Assets	\$ (1,259,715)	\$ (276,818)	\$ 513,137	\$ 1,150,034	\$ 495,877	\$ (54,791)	\$ 89,176	\$ (93,432)	\$ 279,609	\$ 331,411	
Audit Adjustments	\$ -	\$ -	\$ -	\$ (23,251)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Beginning Net Assets	\$ 2,007,039	\$ 747,324	\$ 470,506	\$ 983,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,640,688	\$ 2,547,256	\$ 2,826,865	
Ending Net Assets	\$ 747,324	\$ 470,506	\$ 983,643	\$ 2,110,426	\$ 2,606,303	\$ 2,551,512	\$ 2,640,688	\$ 2,547,256	\$ 2,826,865	\$ 3,158,276	
**Professional Fees											
Legal Fees	\$ 220,017	\$ 453,627	\$ 141,436	\$ 139,489	\$ 158,829	\$ 155,367	\$ 24,310	\$ 25,885	\$ 42,772	\$ 21,179	
Legal Settlement	\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Donated Services - Legal/ORSMA	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 280,400	\$ 137,400	\$ 55,050	\$ -	
Audit Fees	\$ 116,504	\$ 59,785	\$ 49,500	\$ 49,920	\$ 39,300	\$ 38,200	\$ 34,975	\$ 34,000	\$ 18,000	\$ 18,100	
Professional Fees - Other	\$ 219,739	\$ 97,154	\$ 69,687	\$ 84,641	\$ 83,079	\$ 19,727	\$ 11,804	\$ 11,875	\$ 13,135	\$ 11,569	
	\$ 556,260	\$ 860,566	\$ 260,623	\$ 274,050	\$ 281,208	\$ 213,294	\$ 351,489	\$ 209,160	\$ 128,957	\$ 50,848	

(1) Programs & Ministries:
(2) Distributions from Charity, Seminary Funds and Special Appeal Funds

2013 Increase in Gen and Admin:	
- One time expense as OCA Assumed Met JONAH debt to DOS	\$ 42,798
- Enthronement of Met TIKHON	\$ 38,806
- New Program - Psych Testing for all Ordination Candidates	\$ 30,742
- Full implementation of ORSMA	\$ 89,266
Increase in G & A expenses over 2012	\$ 201,612

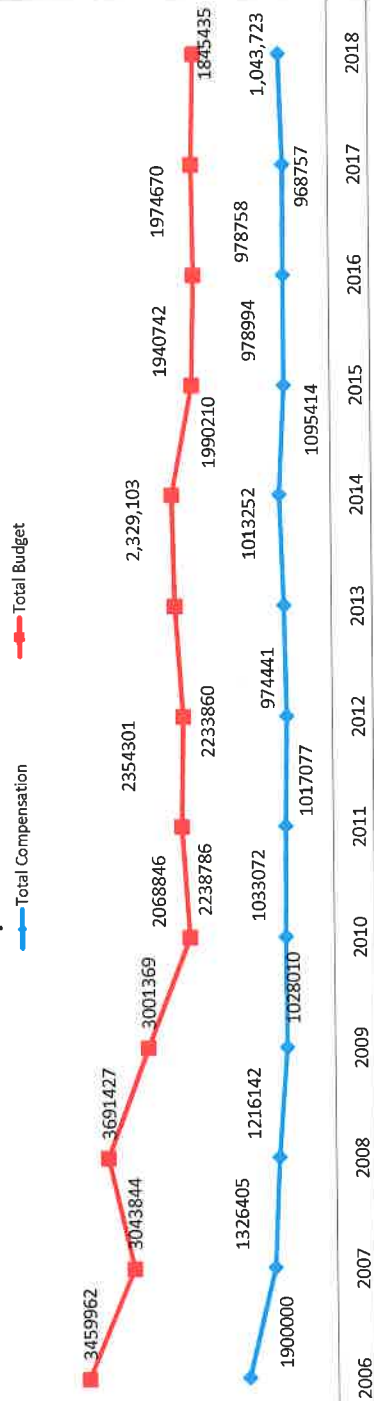
ORTHODOX CHURCH IN AMERICA

SALARIES AND BENEFITS - 2006 THROUGH 2018

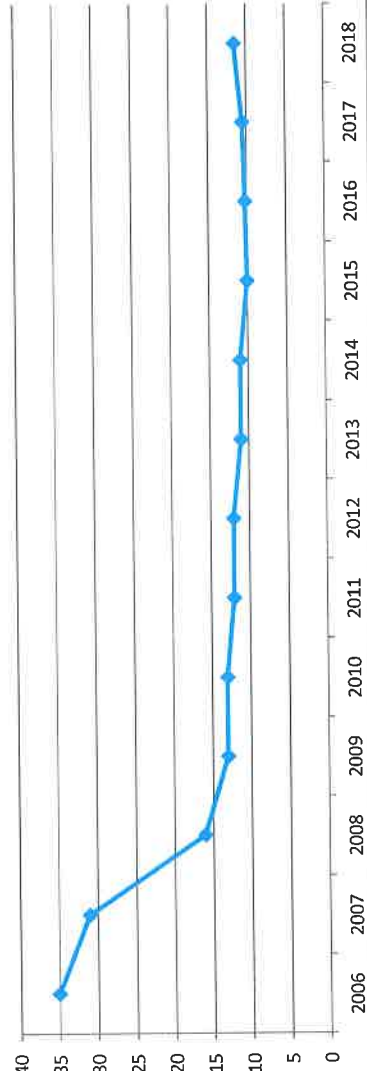
Exhibit C

	# Staff	Total Compensation	Total Budget	Annual Comp Dec/(Inc)	Professional/ Legal Fees
2006	35	\$ 1,900,000	\$ 3,459,962	\$ -	\$ 410,980
2007	31	\$ 1,326,405	\$ 3,043,844	\$ 573,595	\$ 287,266
2008	16	\$ 1,216,142	\$ 3,691,427	\$ 110,263	\$ 556,260
2009	13	\$ 1,028,010	\$ 3,001,369	\$ 188,132	\$ 860,566
2010	13	\$ 1,033,072	\$ 2,068,846	\$ (5,062)	\$ 260,623
2011	12	\$ 1,017,077	\$ 2,238,786	\$ 15,995	\$ 274,050
2012	12	\$ 974,441	\$ 2,233,860	\$ 42,636	\$ 281,208
2013	11	\$ 1,013,252	\$ 2,354,301	\$ (38,811)	\$ 213,294
2014	11	\$ 1,095,414	\$ 2,329,103	\$ (82,162)	\$ 70,114
2015	10	\$ 978,994	\$ 1,990,210	\$ 116,420	\$ 71,760
2016	10.2	\$ 978,758	\$ 1,940,742	\$ 236	\$ 73,907
2017	10.5	\$ 968,757	\$ 1,974,670	\$ 10,001	\$ 50,848
2018	11.5	\$ 1,043,723	\$ 1,845,435	\$ (74,966)	\$ 57,650
			\$ 856,277	\$ 3,468,526	

Compensation and Total Expenses



Staff



Orthodox Church in America
Central Administration Personnel and Costs
For the year 2018

Exhibit D

Full Time Equivalency		Position	Total Comp from		2018		SECA/		2018		2018		Note 2
2015	2018		915 Presentation	Salary	FICA	Insurances	Pension	Total					
1.0	1.0	Metropolitan	\$ 103,203	\$ 76,927	\$ 11,770	\$ 8,921	\$ 6,154	\$ 103,772					
1.0	1.0	Chancellor	\$ 139,008	\$ 92,055	\$ 14,084	\$ 6,144	\$ 7,364	\$ 119,648					
1.0	1.0	Secretary	\$ 139,008	\$ 92,055	\$ 14,084	\$ 12,432	\$ 7,364	\$ 125,936					
0.5	0.5	Treasurer	\$ 62,996	\$ 52,156	\$ 3,990	\$ 4,530	\$ 4,173	\$ 64,849					
0.0	0.0	Assistant to Metropolitan	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
1.0	1.0	Admin Asst/Assistant to Chancellor	\$ 52,768	\$ 45,900	\$ 3,511	\$ -	\$ 3,672	\$ 53,083					
0.0	0.0	Accts Payable Assistant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
0.0	1.0	Archdeacon/Sec to Met/SOCA	\$ -	\$ 89,760	\$ 6,867	\$ 25,426	\$ 7,181	\$ 129,233					
0.0	0.5	General Counsel	\$ -	\$ 28,050	\$ 2,146	\$ -	\$ -	\$ 30,196					
1.0	1.0	Personal Assistant to Metropolitan	\$ 44,895	\$ 30,600	\$ 2,341	\$ 6,041	\$ 2,448	\$ 41,430					
1.0	1.0	Housekeeper	\$ 62,904	\$ 47,277	\$ 3,617	\$ 12,455	\$ 3,782	\$ 67,131					
1.0	1.0	Archivist	\$ 100,888	\$ 64,819	\$ 4,959	\$ 21,634	\$ 5,186	\$ 96,598					
0.0	0.0	TOC Editor/Web Editor (Note 1)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -					
0.5	0.5	External Affairs Director	\$ 38,320	\$ 33,441	\$ 2,558	\$ -	\$ 2,675	\$ 38,674					
1.0	1.0	Rector of St Catherine's	\$ 51,142	\$ 50,000	\$ -	\$ -	\$ 4,000	\$ 54,000					
0.1	0.1	Accounting Assistant	\$ 6,718	\$ 2,880	\$ 220	\$ -	\$ 230	\$ 3,331					
0.0	0.0	Misc Clerical Assistance	\$ 2,791	\$ -	\$ -	\$ -	\$ -	\$ -					
0.6	0.6	ORSMA Director	\$ 72,995	\$ 43,440	\$ 3,328	\$ -	\$ -	\$ 46,768					
0.25	0.25	Communications Assistant	\$ 23,532	\$ 20,400	\$ 1,563	\$ 2,640	\$ 1,632	\$ 26,235					
10.0	11.5	Totals	\$ 901,169	\$ 769,760	\$ 75,037	\$ 100,224	\$ 55,862	\$ 1,000,883					

Note 1

These are now "stipend" positions with no benefits:

Archdeacon/Secretary to Metropolitan	\$ 24,000	\$ -
TOC Editor/Web Editor	\$ 53,825	\$ 42,840
	\$ 978,994	\$ 1,043,723

The Orthodox Church in America

Diocesan Assessment/Proportional Giving Information

For the Years 2011-2018

EXHIBIT E

	\$105/pp 2011 Assessment	\$105/pp 2012 Assessment	\$95/pp 2013 Assessment	\$92/pp 2014 Assessment	\$90/pp 2015 Assessment	2016 Actual	2017 Actual	2018 Proj
						<i>Proportional Giving Formula</i>		
Archdiocese of Washington	\$ 99,750	\$ 94,710	\$ 71,915	\$ 69,276	\$ 68,490	\$ 59,426	\$ 53,437	\$ 55,054
Diocese of the South	\$ 255,360	\$ 258,405	\$ 234,745	\$ 228,528	\$ 232,638	\$ 246,104	\$ 248,681	\$ 248,681
Diocese of Eastern PA	\$ 310,905	\$ 306,810	\$ 266,570	\$ 246,928	\$ 252,038	\$ 188,069	\$ 159,783	\$ 153,125
Diocese of New England	\$ 182,813	\$ 186,270	\$ 173,185	\$ 163,668	\$ 154,440	\$ 151,510	\$ 145,420	\$ 139,361
Diocese of Western PA	\$ 229,110	\$ 221,445	\$ 197,505	\$ 187,500	\$ 161,370	\$ 125,798	\$ 151,968	\$ 145,636
Diocese of New York/NJ	\$ 379,680	\$ 369,285	\$ 324,516	\$ 301,020	\$ 288,675	\$ 219,630	\$ 211,038	\$ 202,228
Diocese of the Midwest	\$ 514,103	\$ 467,146	\$ 435,339	\$ 467,528	\$ 443,214	\$ 456,762	\$ 426,922	\$ 409,837
Diocese of the West	\$ 258,300	\$ 251,580	\$ 233,700	\$ 225,036	\$ 217,080	\$ 234,113	\$ 268,381	\$ 268,381
Totals	\$ 2,230,021	\$ 2,155,651	\$ 1,937,475	\$ 1,889,484	\$ 1,817,945	\$ 1,681,412	\$ 1,665,630	\$ 1,622,303
Diocese of Alaska	\$ 17,015	\$ 16,392	\$ 20,727	\$ 21,955	\$ 17,214	\$ 19,339	\$ 51,794	\$ 20,000
Archdiocese of Mexico	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Archdiocese of Canada	\$ -	\$ 10,420	\$ 15,476	\$ -	\$ -	\$ -	\$ -	\$ -
Albanian Archdiocese	\$ 21,600	\$ 22,000	\$ 22,300	\$ 21,600	\$ 22,000	\$ 33,000	\$ 27,100	\$ 22,000
Bulgarian Diocese	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Romanian Episcopate	\$ 12,000	\$ 12,000	\$ -	\$ -	\$ 48,000	\$ 36,000	\$ 36,000	\$ 36,000
Grand Total	\$ 2,285,636	\$ 2,221,463	\$ 2,000,978	\$ 1,938,039	\$ 1,915,159	\$ 1,779,751	\$ 1,790,524	\$ 1,710,303

[illegible]

9. Job Description of the Director of External Affairs and Interchurch Relations

Supervisory and Job Controls

Is assigned in terms of general objectives. Technical guidance is neither sought nor given, but the Metropolitan and Holy Synod is frequently apprised of progress, made aware of controversial or sensitive issues, and is consulted in advance on actions that may impact the policies of the Church.

Job Summary

As the principal Ecumenical Officer of the OCA, manages relations with other Orthodox churches, other Christian churches and bodies, Christian ecumenical organizations, other religious communities, interfaith organizations, and relevant government offices

Major Duties

1. Promotes worldwide interfaith understanding and communicates the Orthodox Christian message to a wide variety of individuals and groups. Participates in missions, delegations, and ecumenical conferences. Serves as a member of inter-church and governmental boards and committees. Gives formal and informal lectures and talks.
2. Represents the Church in a variety positions on important commissions and committees. Representative examples of these bodies include: SCOBA Study and Planning Commission; International Orthodox Christian Charities; World Council of Churches (WCC) Central Committee; US Conference for the WCC; Christian Churches Together in the USA. In these bodies, absorbs the messages of the other members and conveys the Orthodox viewpoint and perspective. May serve as an officer of the organizations, if elected or appointed. Drafts documents for the Metropolitan and the Holy Synod of Bishops conveying the Church's position on issues that may be sensitive or controversial.
3. Serves as Editor of *The Orthodox Church*, regularly contributing the editorial. Consults with the Metropolitan to ensure that the editorial viewpoint is consistent with the policies of the Church or its Primate. Consults with the Managing Editor, when requested, on various articles submitted by contributors and on the overall content of the publication.

Performs Other Duties as Assigned

Job Requirements

1. Broad and intense knowledge of Orthodox theology and the OCA mission and spiritual message.
2. Ability to absorb complex information rapidly and to apply it with little or no preparation to a variety of sensitive situations.
3. A temperament that enables defending the Orthodox viewpoint and expressing serious disagreement respectfully and without hostility, while simultaneously building good relations.
4. Ability to communicate orally and in writing clearly, concisely, and persuasively on complex and sensitive issues.

10. Report of the Director of External Affairs and InterChurch Relations

Protopresbyter Leonid Kishkovsky

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

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

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

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

with the very limited funding available for the “external affairs” mission, by relying on competent and well-prepared volunteers, the “presence” and “footprint” of the Orthodox Church in America in our relations with others is surprisingly meaningful and significant.

Since his election as Primate of the Orthodox Church in America in 2012, His Beatitude Metropolitan Tikhon has succeeded in ensuring good relations with the Patriarchs and Primates of the Orthodox Churches around the world. This must be noted especially with regard to the Ecumenical Patriarchate, the Churches of Alexandria, Antioch, Moscow, Georgia, Serbia, Romania, and Poland. A strong bond of common mission and vision exists with the Church of Finland, whose Archbishop Leo has accepted our invitation to be with us at the 19th All American Council.

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

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

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

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

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

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

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Bouteneff, Prof. Peter
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Mueller, Matushka Rebecca Luft
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Pierce, Fr. John
Pisarchuk, Fr. Ted
Ready, Fr. Geoffrey
Rentel, Fr. Alexander
Russin, Mr. Jonathan
Schneider, Prof. Richard
Slanta, Mrs. Elizabeth
Tate, Fr. Matthew
Tosi, Fr. Eric G.
Voytovich, Fr. Stephen
Zahirsky, Matushka Valerie

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

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

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

Addendum from Chancery Master Calendar

Sept. 1-7, 2015: Lausanne Orthodox Initiative, Finland
Sep. 15-17, 2015: Assembly of Bishops, Chicago
October 13, 2015: Church World Service, Syosset
October 29 - Nov 5, 2015: WCC/NCC/CCC Evangelism Conference, Toronto
Nov. 20-27, 2015: MT Trip to India

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

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

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

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