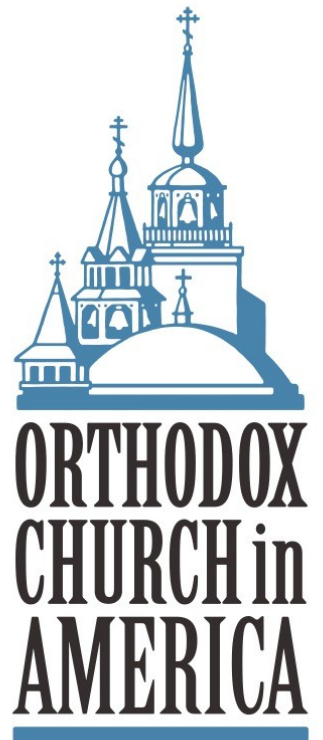


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METROPOLITAN COUNCIL  
of the  
ORTHODOX CHURCH IN AMERICA

REPORTS  
2026 Spring Session



Tuesday, March 10 – Thursday, February 12, 2026  
Conducted by video conference

**TENTATIVE SCHEDULE and AGENDA ITEMS**  
**REGULAR SPRING SESSION OF THE METROPOLITAN COUNCIL**  
**March 10 & 12, 2026**

TO BE HELD VIA TELECONFERENCE

**Tentative Agenda – Tuesday, March 10, 2026, 1:00-4:00 pm EST**

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call– Archpriest Alessandro Margheritino
5. Approval of the Minutes of the Regular Fall 2025 Session and the Special Winter 2025 Session
6. Report of the Metropolitan – His Beatitude Metropolitan Tikhon
7. Report of the Chancellor – Archpriest Alessandro Margheritino
8. Report of the Secretary – Priest David Bozeman
9. Legal Report – Mark Hamilton
10. Property Committee – Gregory Honshul
11. Report of the Treasurer – Mr. Andrew Smith
12. Internal Audit – Sharon Hubiak
13. Concluding Remarks – His Beatitude
14. Prayer – His Beatitude

**Tentative Agenda – Thursday, March 12, 2026, 1:00-4:00 pm EST**

1. Opening Prayer
2. Call to Order – Archpriest Alessandro Margheritino
3. Review of Agenda – Archpriest Alessandro Margheritino
4. Roll Call– Archpriest Alessandro Margheritino
5. Pension Board – Archpriest John Dresko
6. Pension Liaison – David Lane
7. OCA Departments – Archpriest Justin Patterson
8. Report of the Office of Pastoral Life – Archpriest Nicholas Solak
9. MC Handbook & Committees - Archpriest Peter Robichau
10. Open Floor
11. Concluding Remarks – His Beatitude
12. Prayer – His Beatitude

**REPORT OF THE METROPOLITAN  
SPRING 2026 METROPOLITAN COUNCIL**

HELD VIRTUALLY  
MARCH 10 & 12, 2026

1. *Welcome.* I welcome the members of the Metropolitan Council to our regular Spring meeting. It is good to be with you once again as we turn our attention together to the sacred responsibilities entrusted to this body.
  
2. *New diocesan members.* At this session, we welcome a few new diocesan delegates to the Metropolitan Council: from the Albanian Archdiocese – Archpriest Nicholas Dellerman, Rector of Saints Peter and Paul Orthodox Church in Philadelphia and Lisa Sotir; and from the Diocese of the West, we welcome back Archpriest Lawrence Margitich, Rector of Saint Seraphim of Sarov Cathedral in Santa Rosa. We are grateful for your new and returning participation and look forward to your contributions.
  
3. *Departed.* With sorrow, we also offer our prayers to our Metropolitan Council representative from the Diocese of the Midwest, Matushka Miho Ealy, on the falling asleep of her father-in-law, Archpriest John Ealy, who had been serving in retirement at Saint Stephen's Orthodox Church in Longwood, Florida, a parish he had served for 27 years. Likewise, I ask for your prayers on behalf of the recently departed Barbara Honshul, the mother Greg Honshul, the chair of our property committee. On behalf of the Metropolitan Council, I offer condolences to Greg, to Fr. Gregory, Matushka Miho, and their extended families and pray that our Lord will grant eternal rest and

blessed repose to the departed servants of God, Archpriest John and Barbara.

4. *Bishop Seraphim.* I recently presided at the funeral services for the newly-departed Bishop Seraphim, formerly of Sendai, who was a missionary in the Church in Japan for many years and served the Orthodox Church in America in retirement in the New York area. The funeral services took place at Holy Trinity Orthodox Church in Yonkers, along with Archbishop Michael and a number of his clergy., I am grateful for His Eminence's personal efforts in caring for Bishop Seraphim in his final days and for the dedicated labors of the clergy of the Diocese of New York and New Jersey in overseeing the funeral and burial arrangements.
  
5. *Dptychs.* The website of the Orthodox Church in America, through its *In Memoriam* section, regularly informs the wider Church about the repose of the faithful servants of our Church. While I will not read the names of all those who have departed this life since our last Metropolitan Council meeting in October, I encourage you to read the obituaries that are written in remembrance of their lives. It is always inspiring to me when I read even those short lines of text that seek to encapsulate a life-time of ministry and service to Christ and his Church. Here I am reminded of the remarks of Saint Sophrony in his biography of Saint Silouan in which he reflects on the fact that the record of the Athonite's life, as reflected in the monastery register, is quite meager. A few short lines are sufficient to summarize his exterior life, from his birth, through his entrance into the monastery,

and to his death. And yet, beneath those few lines is contained an entire life-time of the saint's experience of God and of the depths of prayer, an experience of his inner life that is not lost but was providentially captured by his biographer (inasmuch as this is possible) to be offered as flowers and as a life-giving gift for the rest of the Church. Though many of us may not attain the heights of great saints such as Saint Silouan or Saint Sophrony, we should be encouraged in knowing that each of us can taste of the same grace of God as we struggle in this life to serve Christ, to pastor our flocks, to raise our families, and to love our neighbors. And to recall that, even in the brief listing of those who have departed this life, we can recognize and remember their years of faithful service.

6. *Saint John of the Ladder*. As we will be reminded this week, as we come up to the Sunday of the Veneration of the Cross, the reality of the Cross is ever before us. We can resist the Cross as a challenge or a setback or we can shoulder it as a call for ascetical and spiritual growth. A recent example of a potential setback is the fire that broke out last Saturday evening at St John of the Ladder Orthodox Church in Greenville, South Carolina. By the grace of God, no one was injured and the damage, though significant, is not beyond remediation. You will have seen the posting about this incident on the website of the Orthodox Church in America, including a link for a *GoFundMe* campaign. I spoke this morning with Fr. Marcus Burch, the rector of the parish, who provided me with some more details about what happened. He also expressed some hopeful optimism with respect to the next steps for the community, noting that, while the assessment of

the damage is ongoing, some immediate actions have already been initiated with respect to the structure itself, the iconography, and the attendant complications, such as the insurance coverage process. More encouraging to me was Fr. Marcus's report of the manner in which his community has come together to deal with this difficulty which they are accepting as an opportunity provided by God to further the mission of the community. As you may know, St John of the Ladder is one of the largest parishes in the Orthodox Church in America in terms of numbers of faithful with an average attendance of 500 on any given Sunday, a combined number of those worshipping at the three altars associated with the parish. I asked Fr Marcus to convey my personal prayers and the prayers of the entire Orthodox Church in America to the clergy (including Fr Peter Robichau, the Metropolitan Council clergy representative from the Diocese of the South, who is assigned at St John's) and to the faithful of the community. Finally, I confirmed my intention to visit Saint John's as previously scheduled for the consecration of the temple at the beginning of next year, though the specific timeline, of course, may need to be revisited depending on the practical challenges of the coming weeks and months.

7. *Church Growth and Clergy Health.* This recent challenge at Saint John's provides us with one example of the growth of the Church, a growth which has been the topic of discussion for all of us in the past two years, especially with the so-called "surge of catechumens and inquirers." This is a challenge and an opportunity for each of our local communities, each of our deaneries, and each of our dioceses. At

the same time, it is a challenge and an opportunity for the Orthodox Church in America as a whole. I am encouraged by the overall efforts on the local level but equally by the energy that is being applied to these challenges by specific institutions and bodies, such as our seminaries and the various offices of the central administration. In the past two months, I have participated in meetings of the Board of Trustees of both Saint Vladimir's Seminary and Saint Tikhon's Seminary. Each of them is taking seriously the need for robust strategic planning even as they each move forward with programs and approaches to address the pastoral formation and educational needs of the Church. While this is primarily focused on the need to form and prepare clergy and lay leaders for the Church, there is an acknowledgement of the importance of strengthening the life of the dioceses and parishes as they receive new converts and look to plant new missions and communities. Likewise, the work of the Office of Pastoral Life, under the direction of Fr. Nicholas Solak, is actively expanding the resources and support that are available to our clergy, our clergy wives, and their families. We will hear a fuller report from Fr. Nicholas on Thursday but I want to say here that I maintain, and ask that we continue to maintain, our strong support for the work of strengthening our clergy and their families as they labor sacrificially to expand the mission of the Orthodox Church in America.

8. *The Metropolitan Council.* It is, of course, the responsibility of our Holy Synod as the highest canonical authority, to oversee the overall trajectory of our Church in facing the challenges and responding to the opportunities that lie before us. It also falls to this body, the

Metropolitan Council, to represent the entire Church in this sacred work. Each of us brings the input of our respective dioceses or serves as a representative from the All-American Council. It is our responsibility to serve, as the Statute informs us, as the “permanent executive body of the Church administration.” This is not a small task and there are many aspects to the responsibilities that fall to us, not only financial and legal, but in the broader sense of exercising fiduciary responsibility for implementing and continuing the work of the All-American Council. Our agenda this week reflects the variety of ways in which we accomplish this. I encourage each of you to contribute to open and honest discussion about sometimes difficult subjects. It is precisely so that we might hold these discussions in a fraternal and respectful atmosphere that we gather in this way. Thank you for your participation in this valuable process.

9. *Archdiocese of Washington.* One of the ongoing matters for which we will receive updates this week is the ongoing process of the relocation of the chancery to the greater Washington area, particularly the status of the sale of the Westwood property. At the same time, I continue to oversee the administrative refreshing of the Archdiocese of Washington that I have outlined previously to the Metropolitan Council. As you may recall, this is not the introduction of something radically new but rather the clarification and implementation of the original intention of the Holy Synod, forty-five years ago, when it established the Archdiocese of Washington as the unique primatial diocese for the Orthodox Church in America. In that conception, the Archdiocese is composed of three deaneries: a territorial component

(that is, the present 11 parishes and missions), the military chaplains, and the stavropegial clergy. To express this structurally, it should be understood that the Chancellor of the Orthodox Church in America also serves as the Chancellor for the larger Archdiocese and each of the three deaneries is overseen by a Dean. At present, there is no formally appointed Dean for the stavropegial clergy but Father Alessandro continues to assist me in a “Dean-like” capacity as he has traditionally done and Fr Ted Boback remains in place as the Dean of the Military Chaplains. With respect to the territorial parishes and missions, I have appointed Fr. Gregory Safchuk to serve as Interim Dean for the Washington Deanery. Although the title of Dean is new, the role and responsibilities of the Dean remain in large part the same as those fulfilled by the former chancellor.

10. *Saint Nicholas Cathedral.* In connection with the renewed archdiocesan structure, I have also made several changes to the clergy assignments at Saint Nicholas Cathedral in Washington, DC. Father Alessandro has been appointed Cathedral Dean, taking on rectoral administrative and liturgical responsibilities in addition to his chancellorship and Father David Bozeman has been assigned as Associate Priest at the Cathedral while continuing to serve as Secretary of the Orthodox Church in America. Father Valery Shemchuk remains as a full-time Associate Priest and primary pastoral contact, continuing his special ministry to the Slavic community.
11. *Officers.* Here, I would like to express my deep gratitude to the officers of the Orthodox Church in America. It has been a great blessing to have

a full complement of officers after a substantial period of transition last year. I will re-iterate what I said in the Fall by emphasizing the great benefit that these appointments have brought to me as the Primate, to my office as a whole, and to the Orthodox Church in America. I am personally grateful for Fr. Alessandro's tireless efforts which reflect his love for the Church and his devotion to the administrative life of the Orthodox Church in America; likewise for the pastoral and professional contribution which Fr. David brings to the position of Secretary. You have received the written reports from both, but those reports do not come close to conveying the amount of work that goes on at the Chancery – work that is not simply administrative but work which is above all pastoral, canonical, and sometimes disciplinary. All of this is often very heavy for a small staff. Although he is not physically present in the office, the third indispensable member of the team of officers is Andrew Smith, our hard-working Treasurer. Even in a part-time capacity, he remains watchful and vigilant over the finances of the Church and their proper accounting, but approach these as a wise steward. I am also thankful for the equally dedicated labors of the other full-time staff at the chancery, Fr. John Mikitish and Deacon Alexander Woodill as well as Matushka Jennifer Levine, who has ended her service at the chancery due to the military reassignment of her husband, Fr Sean Levine. We will miss Fr. Sean and Matushka Jennifer in our geographic area but I am confident that they will continue to contribute effectively to the work of the Church.

12. *External Affairs.* More globally, we continue to experience an increasing level of war and geopolitical conflict in various regions of

the world, including the most recent events in Iran, which have added to the conflicts in the broader region of the Middle East, and of course, the ongoing war in Ukraine and other conflicts. The position of the Orthodox Church on war is clear: we always call for and pray for peace. Not the peace of one side's military victory over the other side, but a just and lasting peace that respects human dignity and ends suffering. While we can debate the theological aspects of war and peace, we ought to, without hesitation, pray for all who suffer and refuse to allow geopolitical divisions to fracture our communion with one another or with any part of the Orthodox Church. This becomes more challenging when certain conflicts impact our local community, where we find faithful with family or ancestry in specific war-torn regions or people who follow these events from different backgrounds and with different loyalties. Nevertheless, all of us experience genuine anguish and, as we are reminded during this Lenten season, our attention ought to be directed to salutary prayer and repentance – not out of selfishness but, in fact, out of care for the world and to remind ourselves, as Saint Silouan reminds us, that “our brother is our life.”

13. In spite of geopolitical and ecclesiastical tensions, the Orthodox Church in America maintains her commitment to full communion with all the canonical autocephalous Orthodox Churches of the world. Even though the Primate of the Orthodox Church in America has not made any major international travel over the past year, we continue to maintain that commitment in other ways. Recently, Fr. Alessandro travelled to Poland on my behalf, and in October of last year, travelled also to Romania and the Czech Lands and Slovakia. These are

significant trips which serve to further our good relations with other Churches, which is one of my primary responsibilities as the Primate. His Grace Bishop Gerasim recently represented me and the Orthodox Church in America in the country of Georgia for the feast of Saint Nino (which you can read about on our website). More locally, the Assembly of Bishops of the United States convened its annual Assembly in Denver, Colorado, in November, at which I and several of our bishops participated, either in person or virtually. As has been a long tradition, there were numerous celebrations of the Sunday of Orthodoxy in which hierarchs, clergy, and faithful of the various jurisdictions came together. One such event was the liturgy held at Saint Catherine Greek Orthodox Church in Braintree, Massachusetts at which His Beatitude, Archbishop Joani, the primate of the Albanian Orthodox Church, presided, along with numerous bishops of the Assembly of Bishops. The Orthodox Church in America was represented by His Grace Bishop Nikodhim, of our Albanian Archdiocese, and His Grace Bishop Benedict, of our Diocese of New England. In addition, His Beatitude served again with Bishop Nikodhim this past Sunday at the Saint George Cathedral in Boston. These are visible signs of the mission of the Orthodox Church in America as the local autocephalous Church called to maintain communion with all the Orthodox Churches, doing this not merely as a formality but as a living witness to the unity of Christ.

14. *Local Travel.* Although it is, of course, within the territory of our own Church, I did travel to Mexico in the middle of January for my annual visit there, which included a visit to the Saint Basil Pastoral School and the blessing of waters at the Cathedral in Mexico City. Back in the Fall, I travelled to the Diocese of the West for the celebrations of the 100<sup>th</sup> anniversary of Fort Ross, to Montreal, Canada, for the 100<sup>th</sup> anniversary of the Saint Peter and Paul Sobor, and to Trenton, NJ, for the 110<sup>th</sup> anniversary of Saint Vladimir's Church. More recently, I participated in the Annual March for Life here in DC and also presided at Saint Vladimir's Seminary for the patronal feast of the chapel on the Feast of the Three Hierarchs.

15. *Conclusion.* I am grateful to the members of the Metropolitan Council for their continued faithful service to the Orthodox Church in America and for their attention to the matters before us. Thank you for your prayers.

16. *Concluding remarks on Thursday.* On Tuesday, one of the clergy members of the Metropolitan Council asked me what words of comfort or exhortation I might offer to address questions from parishioners who are disturbed, anxious, or fearful about the current state of the world, where evil seems to be increasing not only with global wars and conflicts but in domestic turmoil and political drama in various sectors.

17. It is certainly understandable that such happenings would bring to people's minds ancient or contemporary prophecies from saints and elders about the end times, World War III, or the coming of the antichrist (among other topics). It is also understandable that these would bring up feelings of anxiety, uncertainty, and even fear. At the same time, we know that the Church has navigated through many such periods of turmoil throughout her history. I recall traveling to the Holy Mountain as a young novice in 1991. You might recall that the following year, 1992, was being proclaimed (at least in some quarters) as the year in which the antichrist would appear. I remember asking about this on the Holy Mountain. From a few isolated voices, I received confirmation that, indeed, 1992 would be the year in which the antichrist would appear, and that he already amassed his armies in secret underground caverns under various Mediterranean cities. More substantially, I received reminders from many of the fathers that we are in the Church and, as such, we have Christ with us now and always – so while we indeed await the resurrection of the dead and the life of the age to come, and we do speak of the dread judgment seat of Christ, we should recall this reality – that, in fact, Christ is already with us, strengthening us even as we struggle in our personal life of faith, prayer, and repentance. As we proclaim at the liturgy of the presanctified gifts: “the light of Christ illumines all.” The “all” here refers to everything, including the darkness of hades and the darkness of the world.

18. That would be my first response to those who feel anxiety in our age. But I would also reflect a bit on perhaps a more specific

expression of the recurrence of anxiety-inducing events, which seem to come in cycles within society. Here I speak of the rise of so-called “Artificial Intelligence.” Obviously, this is an extensive subject which likely has occupied a lot of time and discussion in our conversations of late. Although the particular aspects of the value of this technology for use (or not) by Orthodox Christians should be considered dispassionately, I myself have been giving some thought to the broader aspects relating to Artificial Intelligence: the ultimate goal of those who are pouring billions of dollars into the raw hardware and research resources required for this enterprise and of the expected end result of the exponential increase in computing capacities, data, and the attainment of “Artificial General Intelligence.” Here, I cite a brief summary (generated by Artificial Intelligence) of what one well-known proponent (Sam Altman) considers to be the goal of Artificial General Intelligence: “to create highly autonomous systems that outperform humans at most economically valuable work, acting as a massive lever to accelerate human progress. Altman aims for AGI to boost global economic growth, foster scientific breakthroughs, and provide individuals with, for example, a ‘remote coworker’ capable of handling any cognitive task.”

19. Such language might elicit in us, as Orthodox Christians, similar fears and anxieties as those we might have with respect to the coming of the antichrist. Here, I would only note that the singular emphasis on the AI enterprise is on the cognitive work of the brain and the intellect (and what we might call in the Church, thoughts). As we know machines cannot pray. They cannot fast. They cannot stand

before God in repentance and receive His mercy. They have no heart. And it is the heart — according to Saint Gregory (whom we commemorated last Sunday), according to the whole hesychast tradition, and according to the Gospel itself — that is the organ of our salvation. All of our structures, all of our plans, all of our intellectual activity (which can indeed be used for the good) exist for one purpose: to create the conditions in which hearts can be opened to grace. That is our mission. That is why we are here. Saint Gregory Palamas, is a preeminent theologian of the apophatic theology who articulates with the greatest clarity what it means for a human being to enter into genuine communion with a God who is, by nature, beyond all human knowing. His teaching is profound, but his message is remarkably simple: it is not the energies of the mind that bring us to God, but the heart — the heart illumined and transformed by divine grace. I believe that this is really the key with which we ought to approach challenges such as the explosion of AI or any future unknown challenges of a similar nature.

20. This also brings me back to our current work as the Church, and more precisely, the work of this Metropolitan Council. Much of our work might be defined as the work “of the intellect,” meaning that we are, rightly, focused on administration, on finances, on legal matters, on the questions of planning and fundraising. But we should remember that all of this is part of our fiduciary responsibility, which is a sacred responsibility, giving meaning to what would otherwise be merely administrative. I am very pleased with our discussions this week and grateful that we have been able to engage in fruitful

discussions about the life of the Church. I am further encouraged by all the blessings that God has granted us in the Orthodox Church in America: a certain level of financial stability, the continued strengthening of the pension plan, the effective ministry of the Office of Pastoral Life and, more broadly, the growth and expansion of our parishes and communities. May our Lord continue to strengthen us in this work and may he bless our continued Lenten journey as we draw closer to the life-giving passion of our Lord and prepare to greet his glorious resurrection.

**Report of the Chancellor of the Orthodox Church in America**  
**Regular Spring 2026 Session of the Metropolitan Council**  
**March 10 & 12, 2026**

**1. Introductory Remarks.** Since my last report to the Metropolitan Council—and, in particular, since the beginning of September—the Chancery has regained a much-needed balance with the appointment of Priest David Bozeman as Secretary of the Orthodox Church in America. His arrival has restored a proper equilibrium within the Central Administration, allowing the distinct responsibilities of the Chancellor and Secretary to be exercised with greater clarity, focus, and effectiveness. I am deeply grateful to Father David for his steady, capable, and pastoral approach to his new ministry, and for the professionalism and dedication he has already demonstrated in service to the Church.

The work of the Chancery continues in its regular rhythm, supporting His Beatitude Metropolitan Tikhon in his primatial responsibilities—and, when necessary, in aspects of his diocesan duties—assisting the Holy Synod of Bishops in its deliberations and decisions, and coordinating the ongoing work of the various offices and departments of the Orthodox Church in America.

As Chancellor, much of my daily work is centered on communication and coordination: reviewing and responding to correspondence, overseeing projects entrusted to the Central Administration, consulting regularly with His Beatitude, and ensuring that matters of canonical, administrative, and pastoral concern are addressed in a timely and responsible manner. This ministry also entails the ongoing task of maintaining, preserving, and strengthening the integrity and witness of our autocephalous Church, both internally and externally.

It remains a profound blessing to serve the Orthodox Church in America in this capacity. I am grateful to His Beatitude for his continued trust, guidance, and paternal support, and to my colleagues at the Chancery for their dedication, collegial spirit, and unwavering commitment to the life of the Church. Together, we strive to ensure that the administrative life of the Orthodox Church in America remains ordered, transparent, and faithful to the Gospel entrusted to us. In this regard, the words of Ecclesiastes offer a helpful reminder for the life of the Church: “For everything there is a season, and a time for every matter under heaven” (Ecclesiastes 3:1). The work of ecclesial administration often unfolds within this rhythm of discernment and patience, reminding us that faithful stewardship sometimes requires waiting for the proper moment, trusting that the Lord guides the life of His Church even when the path forward is not immediately clear.

Administrative service in the life of the Church often brings with it particular challenges and pressures, and it requires stability. The Church moves deliberately and, at times, slowly—intentionally so. Decisions made at the level of Church administration frequently carry consequences that extend widely across dioceses, institutions, and communities. It can therefore be difficult to balance the natural human desire to act quickly when one perceives what may seem to be the right course of action, while recognizing that the proper time for a decision may not yet have arrived. This tension is not unique to high-level Church administration; parish priests encounter it regularly in the pastoral care of their communities. In such circumstances, the work of administration can easily become the object of speculation or assumption. In an age when commentary and interpretation are often immediate and widespread, it is sometimes tempting to overread events. In reality, the life of the central administration of the Church is often far less complicated than it may appear from the outside, and there is frequently less calculation or maneuvering behind the scenes than is imagined. At the same time, we must acknowledge that the work of the Church is carried out by human beings who are subject to frailty, misunderstanding, and pride. For this reason, those entrusted with administrative responsibilities must continually approach their work with humility, self-examination, and a spirit of repentance.

It is also evident that the Orthodox Church throughout the world finds itself living through a difficult period. We Orthodox speak often—and rightly—about communion and unity as essential expressions of the Church's life. When these are strained or wounded, the effects are felt broadly across ecclesial life. Navigating such circumstances requires not only prudence but also a willingness to act with restraint and sobriety. The path forward is rarely as simple as it may sometimes appear from the outside. In such moments, the Church is called above all to prayer, patience, and careful discernment. Trust in the providence of God, fidelity to the canonical order of the Church, and a commitment to mutual respect and charity remain indispensable as we continue the work entrusted to us for the good of the Orthodox Church in America and for the strengthening of her witness in the world.

**2. Chancery Work.** The work of the Chancery remains varied and demanding, encompassing a wide range of pastoral, administrative, and canonical responsibilities. Much of my daily work begins with consultation and coordination with His Beatitude Metropolitan Tikhon, ensuring that matters affecting the life of the Church are addressed in a timely and responsible manner. Regular meetings with Chancery staff help to review ongoing projects and ensure effective communication within the Central

Administration. A significant portion of each day is also dedicated to correspondence and consultation—by phone, video conference, and in person—with bishops, diocesan chancellors, clergy, and professional advisors.

Particular attention continues to be given to matters related to the Office for Review of Sexual Misconduct Allegations (ORSMA) and the Sexual Misconduct Policy Advisory Committee (SMPAC), as well as to ongoing collaboration with our General Counsel on legal and compliance matters affecting the Church. The Chancery also remains engaged in supporting dioceses, stavropegial institutions, and parishes in navigating canonical and administrative questions, while maintaining regular contact with inter-Orthodox and ecumenical partners when necessary.

The responsibilities of the Chancellor's Office require balancing routine administrative work with the need to address unexpected challenges as they arise. This includes oversight of human resources, review of clergy releases and receptions, ordination documentation, pastoral changes, canonical correspondence, and assistance to the Holy Synod and dioceses in implementing established procedures. The Chancery also maintains close collaborations with Stavropegial institutions and provides support to various Church departments and ministries.

Among the projects that have occupied the Chancery's attention in recent months are several initiatives undertaken with the oversight of the Holy Synod related to the liturgical calendar, canonical procedures, social media guidelines, mission grants, the annual Stewards of the OCA campaign, and the preparation and publication of an updated edition of the diptychs of the departed clergy and faithful of the Orthodox Church in America. Additional work has included the continued renewal of His Beatitude's vestry, the preparation of gifts and materials for primatial visits and hospitality, and the care and distribution of relics and holy chrism as directed by the Primate. These projects illustrate the wide scope of responsibilities that fall within the work of the Central Administration.

Beyond these specific initiatives, the Chancery staff continues to provide regular support to His Beatitude in his responsibilities as ruling hierarch of the Archdiocese of Washington. The recent appointment of a local dean has provided welcome assistance to His Beatitude in the oversight of the Archdiocese.

Over the past several months, one of my primary priorities has been assisting with the transition and integration of the new Secretary. Establishing clear coordination between the offices of the Chancellor and the Secretary, as well as among the various Chancery staff, has been an important step toward strengthening the internal functioning of the central administration.

The relocation of the Chancery is ongoing. The Church's property on Long Island remains under contract, and we anticipate closing before the fall of 2026. In the meantime, the Chancery continues to operate from temporary offices in Springfield while efforts are underway to identify a suitable permanent location. The specific features of a permanent Chancery property will likely depend on the proceeds from the eventual sale of the Long Island property.

Further steps have also been taken toward strengthening the practical integration of the Chancery with the life of the Archdiocese. Fr. David and I are now assigned to serve at the Primatial Cathedral of St. Nicholas in Washington, D.C., where we join Archpriest Valery Shemchuk, who continues his full-time ministry at the Cathedral. With responsibilities shared among the three of us, it has been possible to maintain a manageable balance between our pastoral service at the Cathedral and our administrative duties at the Chancery.

As Chancellor, I also serve *ex officio* on several Church boards and regularly participate in their meetings, including those of our seminaries, either in person or remotely. I continue to work closely with our General Counsel, Mr. Mark Hamilton, whose attentiveness and professionalism remain a great support to the Church's administrative work. In addition, I continue to serve as the Chancery liaison to the Pension Board and remain in regular communication with the Pension Administrator to facilitate coordination and the exchange of necessary information.

The Chancery also works regularly with the Office of Pastoral Life and its Director, Archpriest Nicholas Solak. Through ongoing communication and consultation, we assist in supporting and coordinating the various programs and initiatives carried out under the Office of Pastoral Life, offering Chancery support as needed and ensuring appropriate coordination with the broader work of the Central Administration.

Since the fall session of the Metropolitan Council, the Chancery has also been working with the Council's Internal Governance Committee to review and strengthen certain aspects of Council procedures, including work on updating the Metropolitan Council Handbook and reviewing committee charters. I am grateful to Archpriest Peter Robichau and Fr. David for their diligent work in advancing these efforts.

Over the last few months, I have also worked closely with our Property Committee and our attorneys in New York to ensure that the closing of the sales of Westwood takes place as expeditiously and effectively as possible.

More recently, we welcomed Protodeacon Peter Ilchuk to Springfield for a debriefing on the 21st All-American Council held in Phoenix. That meeting also included

initial conversations regarding preparations for the next All-American Council, scheduled to take place in Dallas, Texas, in 2028.

Finally, an important dimension of the Chancellor's responsibilities involves maintaining relations with other Orthodox Churches and ecclesiastical institutions, both within North America and internationally. This includes regular communication with counterparts in other jurisdictions and organizations, as well as travel on behalf of His Beatitude and the Orthodox Church in America when representation or consultation is required.

**3. Activities.** In addition to the daily responsibilities of administration, over the past several months, I have participated in a number of events and travels reflecting both the national and international life of the Orthodox Church in America. A brief summary of some of these activities is provided below.

From October 24 to October 31, I traveled to Europe for an official visit to the Churches of Romania and the Czech Lands and Slovakia, as reported in a press release on our website.

In mid-November, I traveled to New York to visit St. Vladimir's Orthodox Theological Seminary and, together with Priest John Mikitish, offered a presentation to the Faculty Council. Following that visit, we traveled to Long Island to visit the Church's property in Syosset.

At the end of November, together with Fr. David, I traveled to Cleveland to meet with our insurance broker and then continued to Pittsburgh for a meeting with our General Counsel.

Throughout these months, I have also served with His Beatitude on several occasions as he presided at official visits and liturgical celebrations, particularly within the territory of the Archdiocese of Washington.

In January, I accompanied His Beatitude on his annual pastoral visit to the Diocese of Mexico.

At the end of January, His Beatitude and I traveled to New York to attend a special meeting of the Board of Trustees of St. Vladimir's Seminary and for the celebrations of the Feast of the Three Hierarchs.

In February, at the invitation of the Orthodox Church in Poland, I traveled to Poland for an official visit, which was likewise reported in a press release on our website.

Most recently, on March 5–6, I accompanied His Beatitude to St. Tikhon's Orthodox Theological Seminary to attend the meeting of the Board of Trustees.

**4. ORSMA & SMPAC.** I continue to serve as Director of the Office for Review of Sexual Misconduct Allegations (ORSMA) and to work closely with Ms. Cindy Heise, the Office Coordinator. The work of ORSMA remains an essential part of the Church's commitment to safeguarding the faithful while ensuring transparency, accountability, and due process in all matters involving allegations of misconduct. The volume of work in this area naturally fluctuates. There are periods of relative quiet, but there are also times when matters arise that require immediate and sustained attention. I am grateful to Cindy for her steady collaboration and professionalism, as well as for the dedication of the consultants who assist us in this work. Cindy and I meet with the consultants regularly—generally every two weeks—to review cases, assess developments, and ensure that matters entrusted to the office are handled carefully and in accordance with established procedures.

At the same time, I continue to work with the Sexual Misconduct Policy Advisory Committee (SMPAC), which meets regularly to review policy questions, compliance issues, and matters brought forward by dioceses. SMPAC also assists in evaluating how existing policies are being implemented across the Church and, when necessary, offers guidance and recommendations to the Holy Synod.

Together, ORSMA and SMPAC remain important instruments through which the Orthodox Church in America seeks to uphold the highest standards of pastoral responsibility and accountability. Both bodies continue to emphasize the importance of every parish and diocese taking seriously the policies and procedures established by the Holy Synod and ensuring full compliance with all required safeguards. Whenever uncertainty arises, clergy and parish leaders are encouraged to reach out promptly to the Chancery, ORSMA, or SMPAC for guidance. In the event that an allegation is received, it is essential that it be reported immediately and handled in strict accordance with the policies and procedures of the Church.

**5. Conclusions.** I conclude this report with sincere gratitude to His Beatitude for his patient, steady, and pastoral leadership, and to the members of the Holy Synod of Bishops for their continued trust and guidance. I am likewise deeply grateful to my fellow Officers and to the Chancery staff, whose dedication and perseverance sustain much of the daily work that allows the Church's life and ministry to continue in good order.

I also wish to express my appreciation to the members of the Metropolitan Council for their ongoing counsel, engagement, and support in the governance of our autocephalous Church. Your careful attention to the responsibilities entrusted to this

body contributes significantly to the stability and good order of the Orthodox Church in America.

The work of administration within the Church ultimately calls us to remember that everything entrusted to us is a gift from God. As the Scriptures remind us: “For all things come from Thee, and of Thy own have we given Thee” (1 Chronicles 29:14). In this spirit, our task is not one of possession or control, but of stewardship—caring faithfully for what has been entrusted to us, strengthening the life of the Church, and ensuring that our common service remains worthy of the Gospel.

With humility and trust in God’s providence, I remain grateful for the opportunity to serve the Orthodox Church in America in this capacity.

**Report of the Secretary of the Orthodox Church in America  
Regular Spring 2026 Session of the Metropolitan Council  
March 10 & 12, 2026**

**OVERVIEW.** Since the Fall 2025 Session of the Metropolitan Council, I have settled into the role of Secretary, working alongside and supporting Fr. Alessandro Margheritino in his role as Chancellor. Having both the Chancellor and the Secretary in the chancery offices full time along with His Beatitude Metropolitan Tikhon allows for close collaboration and support in carrying out the daily operations of the OCA Chancery. The following report will detail some of the specific responsibilities of the Secretary.

**PHYSICAL OFFICE MANAGEMENT.** The current chancery office is functioning well with all necessary operations being covered by a small but effective team. The chancery location itself, though meant to be temporary, still serves our needs adequately. We are able to function day-to-day. However, the need for a permanent home in which daily prayer, receptions, and gatherings can occur remains a pressing reality.

Over the last few months, we have been in communication with the Nonprofit & Religious Use Coordinator for Zoning and Land Development Services in Fairfax County. This has been helpful in better understanding the zoning challenges we face in purchasing a new property. Completing the sale of the Westwood location will better position us to act quickly on a potential purchase. In the meantime, we continue to search for potential properties daily. We have visited several locations that looked promising but have yet to settle on a particular property.

With the retirement and relocation of Alexis Liberovsky, we have contracted with current St. Vladimir's Seminary student, Fr. John Reavis, as temporary caretaker in Syosset. He is able to make weekly visits to the Westwood property, ensuring it's safety and upkeep until the sale is completed.

**ARCHIVES.** As noted previously, the majority of the OCA archives have been relocated to St. Vladimir's Orthodox Theological Seminary. There remains a substantial amount of material left to sort in the Westwood property, but that material seems to be of less significance. We are currently working with SVS librarian and archivist, Dn. Andrew Kayaian, who is creating a searchable inventory and "finding aid" to allow better digital access to much of the material on hand. We hope to see this become active this year.

**INFORMATION TECHNOLOGY.** The team that manages the information technologies of the OCA includes the OCA Tech Manager, Archpriest John Schroedel, the Director of Communications, Priest Kyle Parrott, along with Matushka Brenda Mikitish and Matushka Jessica Fuhrman. We continue to manage content creation for our website and social media platforms along with database management. One area we have focused on involves updating the OCA website. With help from Fr. John Schroedel, certain changes have been made to our platform which allow for more ease in editing and updating the website. We are exploring the possibility of switching to an open-source platform to

further update the website and allow for broader editorial control. This would be a sizable undertaking and will require investigation before any change could occur.

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

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

The Committee has been in regular discussion about compliance, training, and documentation completion and tracking which remain a challenge in some dioceses. A National Diocesan Policy Coordinators Teleconference is scheduled to be held in March to address some of these concerns.

**COMMUNICATION & PUBLICATIONS.** Priest Kyle Parrott, Director of Communication, will outline the status of our social media platforms and website. The OCA has attempted to consistently provide updates on current events and appropriate newsworthy articles concerning the life of the Church. We are also presenting an updated version of the Social Media Guidelines for Clergy and Lay Leaders to the Holy Synod at the Spring 2026 Session. We hope these updates will encourage our clergy and lay leaders to maintain a high level of discipline and discernment when engaging in social media.

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

**TRAVEL & EVENTS.** While travel is not a major component of my work at the chancery, I have had the opportunity to make a number of trips over the fall and winter. In October I accompanied His Beatitude to the Annual Fort Ross Orthodox Pilgrimage in Jenner, CA. I also made trips with our Chancellor, Archpriest Alessandro Margheritino, to Cleveland, OH to meet with Insurance Systems, Inc., the insurance broker for the OCA, and to Pittsburgh, PA to meet with OCA General Council, Mark Hamilton. That trip also included a visit to The Saint Constantine School, a pan-Orthodox classical education school for Pre-K through High School students. Several trips were also made to both St. Tikhon's Orthodox Theological Seminary and St. Vladimir's Orthodox Theological Seminary. I also accompanied His Beatitude to the Annual March for Life in Washington DC.

A particularly notable event did not involve travel outside of the Washington DC area. The OCA was invited by the Society of St. John of Shanghai to attend discussions on Capitol Hill concerning the Ukrainian Orthodox Church and current legislation affecting the church. The delegation met with several members of congress along with the Director of National Intelligence and was able to share information and education about the canonical complexities in Ukraine as a result of the war. The delegation included hierarchs, clergy, and members of the OCA, The Russian Church Outside of Russia, The Antiochian Archdiocese of North America, and the Greek Orthodox Archdiocese of America.

I also had the pleasure of being invited to the White House to attend the 2025 White House Holiday Open House where the choir from St. Tikhon's Orthodox Theological Seminary performed. It was a memorable occasion.

**PERSONAL MATTERS.** Adjusting to church and chancery life here in the DC area has been equal parts rewarding and difficult. There remain some significant challenges to fully integrating the chancery into the Archdiocese. One difficulty is parish assignment for chancery clergy, an important element of our lives as clergy. This is being rectified for me with a new assignment as Associate Priest at St. Nicholas Cathedral which I hope will be the catalyst for inspiring and energizing the work that is done at the chancery on behalf of the OCA.

**FINAL REMARKS.** From my perspective, the OCA has been in and remains in a transitional period with the move from New York to Washington DC. Completing that move fully is necessary before real flourishing can begin. I am pleased to do my part in accomplishing that and am hopeful that we will see continued growth and maturation as the only autocephalous Orthodox Church in North America.

Respectfully submitted,

Priest David Bozeman  
*Secretary of the Orthodox Church in America*

## Orthodox Church in America

### Treasurer's Report

Metropolitan Council – March 2026

Your Beatitude, Reverend Fathers, brothers and sisters,

Greetings in Christ!

We recently completed another busy, but successful year of financial management of the Orthodox Church in America. Along with the day-to-day transactions of the church, during 2025, we:

- Worked closely with the Office of Pastoral Life (OPL) to both continue the Thriving in Ministry grant program and implement the new Economic Challenges Facing Pastoral Leaders (OCA Financial Health Initiative) grant, both significant multi-year grants from the Lilly Endowment;
- Participated in ongoing discussions and planning regarding the sale of the Westwood property and the future purchase of property to serve as a permanent Chancery location in the metro-Washington D.C. area;
- Successfully completed the 2024 external audit;
- Continued to implement new internal controls and improve processes, consistent with the Internal Audit Committee's recommendations; and,
- Oversaw the financial management component of the All-American Council.

What follows is the Treasurer's update on the finances of the OCA through the end of 2025 and some proposed amendments to the 2026 budget. As you review these items in preparation for the Metropolitan Council meeting, please feel free to contact me at [asmith@oca.org](mailto:asmith@oca.org) with any questions.

### Fiscal Year 2025 – Preliminary Annual Results

Enclosed as **Attachment A** is the year-end Treasurer's Report for 2025 OCA operating activities at 12/31/2025. The report includes:

- Statement of Operating Activity – Unrestricted
- Statement of Operating Activity – Office of Pastoral Life
- Comparative Balance Sheet for 12/31/2025 and 12/31/2024

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect adjustments.

Overall, revenue collection for the year was just above expectation (101.65% of budget); however, individual revenue streams varied significantly with Diocesan contributions significantly exceeding

expected budget and individual giving (both for the OCA as a whole, and for OPL in particular) lagging behind expectation. This revenue total also includes one time revenue of \$166K from the Earnings Retention Tax Credit program for pandemic relief and the use of \$77K in operating reserve to support OPL programs.

Overall, expenses were slightly below anticipated budget (97.20% of overall expense budget). Certain cost centers (e.g., Administration) came in above expense expectation while others (e.g., OPL general, Executive) were below. Of note, there was reallocation of Executive dollars toward Administration for part of the year as the OCA operated with an unfilled Secretary position and there were extra trips (booked to External Affairs) associated with representation at the funeral of Pope Francis and, separately, the enthronement of Pope Leo XIV.

This revenue and expense outcome results in a surplus in net operating activity of \$142K. Of that, \$77K was a release from existing operating reserve, which should be deducted from net operating activity when estimating the change in unrestricted net assets (an increase of approximately \$65K)

In addition to the annual operating activity (unrestricted revenue and expense), the following endowed fund investment activity is provided, showing a \$952K (18.42%) increase in value from 12/31/2024 to 12/31/2025:

	Market Val.	Market Val.	Annual Rate
Investment Accounts	12/31/2024	12/31/2025	of Return
Main Endowment Fund, incl Rotko	2,814,940.46	3,462,363.87	23.00%
FOS Endowment Fund	233,943.51	276,003.23	17.98%
St. Andrew Endowment Fund	195,586.25	217,064.17	10.98%
	3,244,470.22	3,955,431.27	21.91%
Kavalenko	66,913.99	72,817.12	8.82%
OCCIF N/R (Mission Fund)	150,000.00	150,000.00	0.00%
Missions Fund	1,704,859.84	1,939,683.99	13.77%
	1,854,859.84	2,089,683.99	12.66%
	5,166,244.05	6,117,932.38	18.42%

This result is outpaced the S&P 500 return for 2025 (15.96%).

## 2025 All-American Council

**Attachment B** shows the final analysis of the financial activity surrounding the All-American Council (AAC) in Phoenix, AZ. The AAC stayed within budget and experienced a surplus that will help with future AAC activities. The one significant expense variance (Meals and Food) is offset in part by reimbursements from OCA partners (FOCA, dioceses, seminaries) and is, in part, a function of a misalignment between our budgeting and the Conference Center's billing allocation practices for banquets.

Overall, we saw a \$52,802 surplus for the Council. This balance will be carried forward for All-American Council purposes – to cover the Council manager stipend in the interim period before the next Council and to provide seed funding for the next Council, particularly Preconciliar Commission activities.

## 2026 Internal Audit

The Internal Audit Committee of the OCA met in person at the Chancery office in Springfield, VA on Feb. 17-18, 2026 to conduct the annual internal audit. The Committee will present their report to the full Metropolitan Council, under separate cover.

## 2026 Budget Amendments

In light of updated information on a few of the OCA's revenue streams and several of its expense categories, an amended 2026 budget is submitted for the Metropolitan Council's consideration (see **Attachment C**).

- Diocesan Contributions and Individual Contribution lines have been increased to reflect updated expectations
- The planned use of Unrestricted Reserve has been eliminated
- Certain cost centers have been increased to reflect current expectations – the Administration cost center, in particular, bears the largest share of expenses that are sensitive to inflation, risk, and unexpected changes at the entity level
- The OPL budget has been adjusted to reflect its current structure – with some decreases to program expenses and increases associated with planned retreats for clergy and clergy wives.

Respectfully Submitted,



Andrew Smith, Treasurer



# ORTHODOX CHURCH in AMERICA

## **Treasurer's Report**

December 31, 2025

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

Greetings in Christ!

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

Included in this Treasurer's Report for the period ended December 31, 2025 are the following:

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

December 31, 2025 represents all four quarters of the OCA's fiscal year, so the target for operating revenues and expenses is 100%.

Please note that this data, while substantively correct, is preliminary and unaudited. We do expect additional adjustments through the year-end close and audit processes. The data also does not include financial activity associated with the All-American Council, which will be reported separately.

### **Revenues**

Revenue collection was \$3.262M including 100% of our full annual endowment draw and use of restricted funds for 2025, as well as anticipated releases from grant funds, on an annual budget of \$3,209K (101.65%). Diocesan contributions were at 118.49% of budget.

### **Expenses**

Expenses incurred through Q4 2025 were \$3.119M on an annual budget of \$3,209K (97.20%).

### **Net Income**

Unrestricted net income is \$143K through Q4 2025. This includes \$166K in "Other" income pertaining to the federal Earnings Retention Tax Credit program for pandemic relief, which is non-recurring.

If you have any questions about this report, please don't hesitate to contact me at [asmith@oca.org](mailto:asmith@oca.org).

In Christ,

Andrew D. Smith  
Treasurer

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2025 - **Preliminary & Unaudited**  
December 31, 2025

				Target 100.00%	
A	B	C	D	E	
<i>Unrestricted - Consolidated including OPL</i>	<b>CURRENT QUARTER</b>	<b>2025 YTD ACTUAL</b>	<b>2025 BUDGET</b>	<b>% BUDGET USED</b>	
1	<b>REVENUE</b>				
2	Diocesan Contributions	567,629	2,095,204	1,768,239	118.49%
3	Individual/Business Contributions	67,198	125,239	155,000	80.80%
4	Indiv. Contributions - OPL General	74,015	118,364	364,734	32.45%
5	Indiv. Contributions - Thriving in Min	-	19,615	95,000	20.65%
6	Indiv. Contributions - Fin. Health Init.	11,061	11,380	162,500	7.00%
7	Appeals	-	-	-	
8	Service Fees	3,885	31,661	50,000	63.32%
9	Program Svc Fees - Thriving in Ministry	-	-	21,600	0.00%
10	Interest Income/Realized Gains/Losses	9,973	39,436	50,000	78.87%
11	Interest Income - Fin. Health Init.	5,263	26,360		
12	Other	(53,762)	203,382	50,000	406.76%
13	Release from Restriction - Endowed	18,750	75,000	75,000	100.00%
14	Release from Restriction - Restricted	24,774	84,774	90,000	94.19%
15	Release from Grant - Thriving in Min	43,919	175,677	137,250	128.00%
16	Release from Grant - Fin. Health Initiative	44,678	178,714	95,039	188.04%
17	Use of Reserve - OCA Contr. to TiM	12,500	50,000	50,000	100.00%
18	Use of Reserve - OCA Contr. to FHI	6,813	27,250	27,250	100.00%
19	Use of Unrestricted Reserve	-	-	17,500	0.00%
20	<b>TOTAL REVENUE</b>	<b>836,696</b>	<b>3,262,056</b>	<b>3,209,112</b>	<b>101.65%</b>
21					
22					
23					
24	<b>EXPENSES</b>				
25	Administration	280,863	993,513	775,997	128.03%
26	Executive	157,374	571,531	662,106	86.32%
27	Archives	2,166	76,416	111,019	68.83%
28	External Affairs	32,885	78,119	44,500	175.55%
29	Chapel	-	5,432	-	
30	Property	79,433	115,578	127,300	90.79%
31	TOC/Comm	12,826	60,031	36,300	165.37%
32	Holy Synod	32,959	73,814	68,400	107.92%
33	Metropolitan's Office	24,545	100,526	102,147	98.41%
34	Metropolitan Council	5,603	36,928	32,450	113.80%
35	St. Catherine's	16,773	67,091	62,658	107.07%
36	SOCA	-	-	-	
37	BOT	-	-	-	
38	Mission Planting Grants	20,000	80,000	80,000	100.00%
39	Ordination Candidacy	1,000	7,000	5,000	140.00%
40	Canons & Statutes	-	-	-	
41	ORSMA	8,123	31,194	36,668	85.07%
42	Continuing Ed	-	-	-	
43	Seminaries	18,000	18,000	18,000	100.00%
44	Departments	40,880	121,652	109,745	110.85%
45	Office of Pastoral Life, general	45,535	193,364	425,434	45.45%
46	OPL - Thriving in Ministry	81,261	245,292	253,850	96.63%
47	OPL - Financial Health Initiative	51,757	243,704	257,539	94.63%
48	<b>TOTAL EXPENSES</b>	<b>911,982</b>	<b>3,119,184</b>	<b>3,209,112</b>	<b>97.20%</b>
49					
50	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>(75,286)</b>	<b>142,871</b>	<b>(0)</b>	

**ORTHODOX CHURCH IN AMERICA**  
Statement of Operating Activity - FY2025 - **Preliminary & Unaudited**  
December 31, 2025

				Target 100.00%	
A	B	C	D	E	
<i>Office of Pastoral Life - Lilly Grant Detail</i>	<b>CURRENT QUARTER</b>	<b>2025 YTD ACTUAL</b>	<b>2025 BUDGET</b>	<b>% BUDGET USED</b>	
1	<b>REVENUE</b>				
3					
4	-	19,615	95,000	20.65%	
5	-	-	21,600	0.00%	
6	43,919	175,677	137,250	128.00%	
7	12,500	50,000	50,000	100.00%	
8	<i>Thriving in Ministry Subtotal</i>	<i>56,419</i>	<i>303,850</i>	<i>80.73%</i>	
9					
10	11,061	11,380	162,500	7.00%	
11	5,263	26,360	-		
12	44,678	178,714	95,039	188.04%	
13	6,813	27,250	27,250	100.00%	
14	<i>Financial Health Initiative Subtotal</i>	<i>67,815</i>	<i>284,789</i>	<i>85.57%</i>	
15					
16	<b>TOTAL REVENUE</b>	<b>124,234</b>	<b>488,996</b>	<b>588,639</b>	<b>83.07%</b>
17					
18	<b>EXPENSES</b>				
19					
20	70,497	245,292	253,850	96.63%	
21	40,989	243,704	257,539	94.63%	
22					
23	<b>TOTAL EXPENSES</b>	<b>111,487</b>	<b>488,996</b>	<b>511,389</b>	<b>95.62%</b>
24					
25	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>12,747</b>	<b>-</b>	<b>77,250</b>	<b>0.00%</b>

**ORTHODOX CHURCH IN AMERICA**  
Balance Sheet - FY2025 - **Preliminary & Unaudited**  
December 31, 2025

A	B	C	D
	<u>12/31/2025</u>	<u>12/31/2024</u>	<b>DIFFERENCE</b>
1 <b>ASSETS</b>			
2 Cash & Cash Equivalents - Operating	2,522,848	2,497,897	24,951
3 Cash & Cash Equivalents - Restricted	276,011	545,372	(269,361)
4			
5 Accounts Receivable	44,861	76,431	(31,570)
6 Prepaid Expense	-	85,925	(85,925)
7 Other Current Assets	1,154	25,406	(24,252)
8			
9 Security Deposit	30,030	-	30,030
10 Fixed Assets, net of depreciation	123,611	137,366	(13,755)
11 Investments	6,117,932	5,166,244	951,688
12 Right of Use Asset - Office Space & Apt	173,533	51,587	121,946
13			
14 <b>Total Assets</b>	<u>9,289,979</u>	<u>8,586,227</u>	<u>703,752</u>
15			
16			
17 <b>LIABILITIES</b>			
18 Accounts Payable	121,185	129,017	(7,832)
19 Accrued Expenses	179	-	179
20 Unitrust Liability	904	904	-
21 Payroll Liabilities	-	44	(44)
22 Other Liabilities	6,049	6,710	(661)
23			
24 Deferred Revenue	-	30,851	(30,851)
25			
26 ST Lease - Office Space	173,533	52,602	120,931
27			
28 <b>Total Liabilities</b>	<u>301,850</u>	<u>220,128</u>	<u>81,723</u>
29			
30			
31 <b>NET ASSETS</b>	<u><u>8,988,129</u></u>	<u><u>8,366,099</u></u>	<u><u>622,030</u></u>

**ORTHODOX CHURCH IN AMERICA**

21st All-American Council

*Actual to Budget*

	<b>AAC 2025 ACTUAL</b>	<b>AAC 2025 BUDGET</b> <i>Adopted - Fall 2024</i>	<b>VARIANCE ACT to BUD</b>
1 <b>REVENUE</b>			
2 Diocesan Proportional Giving	328,569	328,569	(0)
3 General Donations	5,738	3,556	2,182
4 Vendor & Exhibitor Fees	28,000	40,625	(12,625)
5 Observer Fees	54,945	36,000	18,945
6 Youth Registration Fees	32,150	35,000	(2,850)
7 Youth Other Revenue	525	1,500	(975)
8 Partner Reimb (FOCA, Dioceses, Seminaries)	33,371	12,325	21,046
9 <b>TOTAL REVENUE</b>	<b>483,298</b>	<b>457,575</b>	<b>25,723</b>
10			
11			
12 <b>EXPENSES</b>			
13 Flowers & Liturgical Items		500	500
14 PCC Lunch	456	200	(256)
15 Outside Contractors			-
16 * Exposition Services	6,180	10,000	3,820
17 * Photographer		5,000	5,000
18 * PSAV Services	94,898	80,000	(14,898)
19 * Other Contract Services	5,148	15,000	9,852
20			-
21 Postage, Printing & Copying	8,780	10,000	1,220
22 Office Supplies	4,203	2,500	(1,703)
23 Stipends (3 years)	15,400	36,000	20,600
24			-
25 Equipment Rental		2,000	2,000
26 Travel	20,368	28,000	7,632
27 Lodging	87,829	86,775	(1,054)
28 Meals & Food	158,677	88,000	(70,677)
29 <b>Operating Expenses</b>	<b>401,937</b>	<b>363,975</b>	<b>(37,962)</b>
30			
31 Youth - Registration Grants			
32 Food	5,023	27,000	21,977
33 Supplies & Other	9,758	10,900	1,142
34 Activity Fees	724	10,600	9,876
35 Travel to Outings		3,500	3,500
36 <b>Youth Program</b>	<b>15,505</b>	<b>52,000</b>	<b>36,495</b>
37			
38 FOS Tours - Mexico Delegation	2,988	5,000	2,012
39 FOS Tours - Alaska Delegation	2,728	5,000	2,272
40 <b>Travel</b>	<b>5,716</b>	<b>10,000</b>	<b>4,284</b>
41			
42 <b>Contingency (~7%)</b>	<b>7,337</b>	<b>31,600</b>	<b>24,263</b>
43			
44 <b>TOTAL EXPENSES</b>	<b>430,495</b>	<b>457,575</b>	<b>27,080</b>
45			
46 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>52,802</b>	<b>(0)</b>	<b>52,803</b>

**ORTHODOX CHURCH IN AMERICA**

2026 Budget - Summary

*Amendments for Consideration at the Spring 2026 Metropolitan Council meeting*

	A	B	C	D	E	F
	YTD Actual	BUDGET	% BUDGET	BUDGET	Amendments	BUDGET
<i>Unrestricted - OCA Operations</i>	12/31/2025	2025	USED	Original 2026		Amended 2026
<b>REVENUE</b>						
1 Diocesan Contributions	2,095,204	1,768,239	118.49%	1,843,516	186,655 [A]	2,030,172
2 Individual/Business Contributions	125,239	155,000	80.80%	102,292	49,958 [A]	152,250
3 Individual/Business Contr - OPL General	118,364	364,734	32.45%	126,531		126,531
4 Service Fees	31,661	50,000	63.32%	50,000	-	50,000
5 Interest Income/Realized Gains/Losses	39,436	50,000	78.87%	35,000	-	40,000
6 Other	203,382	50,000	406.76%	50,000	-	50,000
7 Release from Restriction - <i>Endowed Funds</i>	75,000	75,000	100.00%	125,000	-	125,000
8 Release from Restriction - <i>Restricted Funds</i>	84,774	90,000	94.19%	114,000	-	114,000
9 Use of Unrestricted Reserve	-	17,500		171,642	(171,642) [B]	-
10 <b>TOTAL REVENUE</b>	<b>2,773,060</b>	<b>2,620,473</b>	<b>105.82%</b>	<b>2,617,981</b>	<b>64,971</b>	<b>2,687,953</b>
11						
12						
13						
14						
15 <b>EXPENSES</b>						
16 Compensation & Benefits						
17 Administration	387,715	313,814	123.55%	357,420 p.2	23,000 [C]	380,420
18 Executive	540,363	634,706	85.14%	649,957 p.3	-	649,957
19 Archives	73,395	109,519	67.02%	12,000 p.4	-	12,000
20 Office of Pastoral Life - General	57,424	168,750	34.03%	102,554	(40,000) [E]	62,554
21 <b>Total Compensation &amp; Benefits</b>	<b>1,058,897</b>	<b>1,226,789</b>	<b>86.31%</b>	<b>1,121,930</b>	<b>(17,000)</b>	<b>1,104,930</b>
22						
23 Goods & Services						
24 Administration	605,798	462,182	131.07%	489,682 p.2	111,500 [C]	601,182
25 Executive	21,117	27,400	77.07%	28,200 p.3	-	28,200
26 Archives	3,021	1,500	201.40%	5,000 p.4	-	5,000
27 External Affairs	78,119	44,500	175.55%	47,500 p.5	10,000 [D]	57,500
28 Property, incl depr.	115,578	127,300	90.79%	105,650 p.6	-	105,650
29 TOC/Comm	60,031	36,300	165.37%	46,500 p.8	15,000 [D]	61,500
30 Holy Synod	73,814	68,400	107.92%	68,400 p.8	10,000 [D]	78,400
31 Metropolitan's Office	110,577	102,147	108.25%	107,147 p.8	10,000 [D]	117,147
32 Metropolitan Council	36,928	32,450	113.80%	32,450 p.8	-	32,450
33 St. Catherine's	67,091	62,658	107.07%	62,658 p.9	1,062 [D]	63,720
34 Mission Planting Grants	80,000	80,000	100.00%	104,000 p.9	-	104,000
35 Ordination Candidacy	7,000	5,000	140.00%	5,000 p.9	3,000 [D]	8,000
36 ORSMA	31,194	36,668	85.07%	36,668 p.7	-	36,668
37 Seminaries	18,000	18,000	100.00%	18,000 p.9	-	18,000
38 Departments	121,652	109,745	110.85%	119,745 p.9	-	119,745
39 Office of Pastoral Life - General	135,940	256,684	52.96%	142,200	3,660 [E]	145,860
40 <b>Total Goods &amp; Services</b>	<b>1,565,860</b>	<b>1,470,935</b>	<b>106.45%</b>	<b>1,418,801</b>	<b>164,222</b>	<b>1,583,023</b>
41						
42 <b>TOTAL EXPENSES</b>	<b>2,624,757</b>	<b>2,697,723</b>	<b>97.30%</b>	<b>2,540,731</b>	<b>147,222</b>	<b>2,687,953</b>
43						
44 <b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>148,303</b>	<b>(77,250)</b>		<b>77,250</b>		<b>(0)</b>

OCA Contribution to Thriving in Ministry	50,000	50,000	100.00%	50,000
OCA Contribution to Fin. Health Initiative	27,250	27,250	100.00%	27,250
<b>Use of Reserve - Total</b>	<b>77,250</b>	<b>77,250</b>	<b>100.00%</b>	<b>77,250</b>

**Notes:**

- [A] Diocesan contributions and Individual contributions increased to reflect 2025 actual activity.
- [B] Elimination of use of unrestricted reserve.
- [C] Administration budget increased to reflect actual structure in 2026, including compensation and contract services.
- [D] Modest departmental adjustments to reflect anticipated needs in 2026.
- [E] OPL adjustments reflect restructured positions (salaries and compensation) and reallocation from technology consulting to Clergy and Clergy Wives retreat programming

**ORTHODOX CHURCH IN AMERICA**

2026 Budget - Summary

*For consideration at the Spring 2026 Metropolitan Council meeting*

				Target 100.00%
<i>Grant Funded Programs</i>				
	A	B	C	D
	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>
	<b>12/31/2025</b>	<b>Amended 2025</b>	<b>USED</b>	<b>Original 2026</b>
1	<b><i>Thriving in Ministry</i></b>			
2	Individual Contributions - Thriving in Min	19,615	95,000	61,000
3	Program Service Fees - Thriving in Ministry	-	21,600	63,356
4	Release from Grant - Thriving in Ministry	175,677	137,250	90,030
5	Use of Reserve - OCA Contribution to TiM	50,000	50,000	50,000
6	TiM Revenue	<u>245,292</u>	<u>303,850</u>	264,386
7			<b>80.73%</b>	
8	Compensation & Benefits	40,761	51,250	59,224
9	Goods & Services	204,531	202,600	205,162
10	TiM Expenses	<u>245,292</u>	<u>253,850</u>	264,385
11			<b>96.63%</b>	
12	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>-</b>	<b>50,000</b>	<b>0</b>
13				
14				
15				
16	<b><i>Financial Health Initiative</i></b>			
17	Individual Contributions - Fin. Health Init.	11,380	162,500	95,000
18	Interest Income - Fin. Health Initiative	26,360		18,751
19	Release from Grant - Fin. Health Initiative	178,714	95,039	187,500
20	Use of Reserve - OCA Contribution to FHI	27,250	27,250	27,250
21	FHI Revenue	<u>243,704</u>	<u>284,789</u>	328,501
22			<b>85.57%</b>	
23	Compensation & Benefits	40,773	85,000	68,607
24	Goods & Services	202,930	172,539	259,894
25	TiM Expenses	<u>243,704</u>	<u>257,539</u>	328,501
26			<b>94.63%</b>	
27	<b>REVENUE OVER/(UNDER) EXPENSES</b>	<b>-</b>	<b>27,250</b>	<b>0</b>

**Note:** No proposed amendments to grant-funded programs.

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2026 Budget - Expenses by Department

	YTD Actual 12/31/2025	BUDGET 2025	% BUDGET USED	BUDGET	Amendments	BUDGET
				Original 2026		Amended 2026
6010-05 Administration-Salaries	290,387.60	248,615.03		281,499.65	-	281,499.65
6012-05 Administration-FICA/MED	2,405.93	1,863.78		3,136.50	-	3,136.50
6013-05 Administration-Unemployment Ins W/H	723.30			-	-	-
6014-05 Administration-Payroll Processing Fees	3,469.49	3,000.00		3,000.00	500.00	3,500.00
6015-05 Administration-Health Insurance	34,977.34	22,936.44		30,249.44	5,000.00	35,249.44
6016-05 Administration-Workers Compensation/Disabili	11,717.50	651.72		708.22	12,000.00	12,708.22
6017-05 Administration-Pension expense	40,912.22	34,147.18		36,226.14	5,000.00	41,226.14
6018-05 Administration-Life Insurance	3,121.75	2,600.00		2,600.00	500.00	3,100.00
	<u>387,715.13</u>	<u>313,814.16</u>	123.55%	<u>357,419.95</u>	<u>23,000.00</u>	<u>380,419.95</u>
				p.1 line 17		p.1 line 17
6051-05 Administration-Charity Distribution	2,500.00					
6095-05 Administration-Bank Fees	11,102.91	5,000.00		5,000.00	6,000.00	11,000.00
6096-05 Administration-Dues		-		-	-	-
6100-05 Administration-Office Expense	1,390.73	-		-	-	-
6105-05 Administration-Food	1,222.98	1,000.00		1,000.00	500.00	1,500.00
6110-05 Administration-Flowers/Candles/Liturgical iten	5,047.11	5,600.00		5,600.00	-	5,600.00
6210-05 Administration-Contract Services	38,489.60					
6211-05 Administration-Accounting Fees	31,900.52	25,000.00		25,000.00	6,000.00	31,000.00
6214-05 Administration-Legal Fees	107,589.05	94,000.00		94,000.00	15,000.00	109,000.00
6215-05 Administration-Outside Contract Services	108,232.39	62,000.00		62,000.00	45,000.00	107,000.00
6280-05 Administration-Rent	71,624.95	72,070.39		72,070.39	-	72,070.39
6284-05 Administration-Equipment Rental & Maint.	418.25				500.00	500.00
6501-05 Administration-Books, Subscriptions, Dues	2,603.46	-		-	3,000.00	3,000.00
6502-05 Administration-Postage, Mailing Service	2,147.36	1,500.00		1,500.00	1,000.00	2,500.00
6503-05 Administration-Printing and Copying	8,554.68	1,000.00		1,000.00	9,000.00	10,000.00
6504-05 Administration-Supplies	1,535.80	2,000.00		2,000.00	-	2,000.00
6505-05 Administration-Cell Phones	3,214.34				3,500.00	3,500.00
6512-05 Administration-Insurance - Liability, D and O		-		-	-	-
6516-05 Administration-Misc Other	764.73	-		-	-	-
6650-05 Administration-Stipends	41,000.00	41,000.00		47,000.00	-	47,000.00
6670-05 Administration-Computer Expense	677.97	2,000.00		2,000.00	-	2,000.00
6720-05 Administration-Telephone	2,035.61	1,000.00		1,000.00	1,000.00	2,000.00
6727-05 Administration-Internet	1,784.48	3,500.00		3,500.00	(1,000.00)	2,500.00
6733-05 Administration-Website	1,800.00	-		-	2,000.00	2,000.00
6750-05 Administration-Insurance	40,984.75	31,229.25		31,229.25	10,000.00	41,229.25
6831-05 Administration-Conference, Convention, Meeting		-		10,000.00	-	10,000.00
6832-05 Administration-Travel	4,095.62	-		5,000.00	-	5,000.00
6833-05 Administration-Lodging	3,490.77	-		5,000.00	10,000.00	15,000.00
6834-05 Administration-Meals	3,551.00	1,000.00		2,500.00	-	2,500.00
6835-05 Administration-Moving Expenses		-		-	-	-
6900-05 Administration-Automobile	38.89	2,782.73		2,782.73	-	2,782.73
6903-05 Administration-Auto gasoline		500.00		500.00	-	500.00
6910-05 Administration-Other	108,000.00	110,000.00	[A]	110,000.00	[A]	110,000.00
	<u>605,797.95</u>	<u>462,182.37</u>	131.07%	<u>489,682.37</u>	<u>111,500.00</u>	<u>601,182.37</u>
				p.1 line 24		p.1 line 24

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

**ORTHODOX CHURCH IN AMERICA**

Proposed 2026 Budget - Expenses by Department

	YTD Actual 12/31/2025	BUDGET 2025	% BUDGET USED	BUDGET		BUDGET Amended 2026
				Original 2026	Amendments	
6010-07 Executive-Salaries	455,445.60	527,879.84		525,227.94	-	525,227.94
6012-07 Executive-FICA/MED	3,385.89	3,213.00		3,585.65	-	3,585.65
6014-07 Executive-Payroll Processing Fees		-		-	-	-
6015-07 Executive-Health Insurance	30,282.49	34,225.08		58,346.46	-	58,346.46
6016-07 Executive-Workers Compensation/Disability		2,366.30		2,209.29	-	2,209.29
6017-07 Executive-Pension expense	51,248.98	67,021.52		60,587.20	-	60,587.20
	<u>540,362.96</u>	<u>634,705.74</u>	85.14%	<u>649,956.54</u>	-	<u>649,956.54</u>
				p.1 line 18		p.1 line 18
6105-07 Executive-Food	3.52	-		-	-	-
6110-07 Executive-Flowers/Candles/Liturgical item	-	-		-	-	-
6501-07 Executive-Books, Subscriptions, Dues	3,103.73	-		-	-	-
6504-07 Executive-Supplies	96.63	1,000.00		1,000.00	-	1,000.00
6515-07 Executive-Memberships	-	-		-	-	-
6650-07 Executive-Stipends	-	-		-	-	-
6720-07 Executive-Telephone	393.56	-		-	-	-
6725-07 Executive-Mobile Phones	-	7,200.00		7,200.00	-	7,200.00
6727-07 Executive-Internet	1,949.69	-		-	-	-
6832-07 Executive-Travel	7,398.99	18,000.00		18,000.00	-	18,000.00
6833-07 Executive-Lodging	(50.00)	-		-	-	-
6834-07 Executive-Meals	1,270.31	1,200.00		2,000.00	-	2,000.00
6903-07 Executive-Auto gasoline	324.92	-		-	-	-
6910-07 Executive-Other Administrative Expense	6,625.79	-		-	-	-
	<u>21,117.14</u>	<u>27,400.00</u>	77.07%	<u>28,200.00</u>	-	<u>28,200.00</u>
				p.1 line 25		p.1 line 25

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2026 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>12/31/2025</b>	<b>2025</b>	<b>USED</b>	<b>Original 2026</b>	<b>Amendments</b>	<b>Amended 2024</b>
6010-08 Archives-Salaries	51,608.00	77,412.18		12,000.00	-	12,000.00
6012-08 Archives-FICA/MED	3,948.02	6,997.03		-	-	-
6015-08 Archives-Health Insurance	10,614.08	14,052.26		-	-	-
6016-08 Archives-Workers Compensation/Disability		219.51		-	-	-
6017-08 Archives-Pension expense	7,225.12	10,837.70		-	-	-
	<u>73,395.22</u>	<u>109,518.68</u>	<u>67.02%</u>	<u>12,000.00</u>	<u>-</u>	<u>12,000.00</u>
				p.1 line 19		p.1 line 19
6092-08 Archives-Business Registration Fees	-	200.00		-	-	-
6215-08 Archives-Outside Contract Services				5,000.00	-	5,000.00
6504-08 Archives-Supplies	-	800.00		-	-	-
6516-08 Archives-Misc Other	574.80	-		-	-	-
6650-08 Archives-Stipends	300.00	-		-	-	-
6832-08 Archives-Travel	2,146.27	500.00		-	-	-
	<u>3,021.07</u>	<u>1,500.00</u>	<u>201.40%</u>	<u>5,000.00</u>	<u>-</u>	<u>5,000.00</u>
				p.1 line 26		p.1 line 26

**ORTHODOX CHURCH IN AMERICA**

Proposed 2026 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>12/31/2025</b>	<b>2025</b>	<b>USED</b>	<b>Original 2026</b>	<b>Amendments</b>	<b>Amended 2026</b>
6010-09 External Affairs-Salaries	-	-		-	-	-
6012-09 External Affairs-FICA/MED	-	-		-	-	-
6013-09 External Affairs-Unemployment Ins W/H	-	-		-	-	-
6016-09 External Affairs-Workers Compensation/Disabil	-	-		-	-	-
6017-09 External Affairs-Pension expense	-	-		-	-	-
	-	-		-	-	-
6050-09 External Affairs-Charity Distribution	15,000.00			-	15,000.00	15,000.00
6051-09 External Affairs-Mission Distribution	10,000.00			-	10,000.00	10,000.00
6096-09 External Affairs-Dues	13,965.00	39,500.00		39,500.00	(25,000.00)	14,500.00
6516-09 External Affairs-Misc - Other	3,718.08			-	-	-
6831-09 External Affairs-Conference, Convention, Meetin	285.00	-		-	-	-
6832-09 External Affairs-Travel	23,767.66	5,000.00		8,000.00	5,000.00	13,000.00
6833-09 External Affairs-Lodging	10,059.11	-		-	5,000.00	5,000.00
6834-09 External Affairs-Meals	1,323.65	-		-	-	-
	<u>78,118.50</u>	<u>44,500.00</u>	<u>175.55%</u>	<u>47,500.00</u>	<u>(15,000.00)</u>	<u>57,500.00</u>
				<u>p.1 line 27</u>		<u>p.1 line 27</u>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2026 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>12/31/2025</b>	<b>2025</b>	<b>USED</b>	<b>Original 2026</b>	<b>Amendments</b>	<b>Amended 2026</b>
6010-11 Property Support-Salaries	-	-		-	-	-
6012-11 Property Support-FICA/MED	-	-		-	-	-
6013-11 Property Support-Unemployment Ins W/H	-	-		-	-	-
6015-11 Property Support-Health Insurance	-	-		-	-	-
6016-11 Property Support-Workers Comp/Disability	-	-		-	-	-
6017-11 Property Support-Pension expense	-	-		-	-	-
	<u>-</u>	<u>-</u>		<u>-</u>	<u>-</u>	<u>-</u>
6215-11 Property Support-Outside Contract Services	-	5,000.00		17,000.00	-	17,000.00
6273-11 Property Support-Real Estate, Personal Prop Ta:	46,897.59	45,000.00		45,000.00	-	45,000.00
6285-11 Property Support-Janitorial Services	2,542.50	-		-	-	-
6286-11 Property Support-Lawn	23,980.00	20,000.00		10,000.00	-	10,000.00
6287-11 Property Support-Exterminating	484.00	500.00		250.00	-	250.00
6288-11 Property Support-Garbage Removal	1,375.00	3,000.00		1,500.00	-	1,500.00
6290-11 Property Support-Repairs expense	1,350.00	3,000.00		1,500.00	-	1,500.00
6504-11 Property Support-Supplies	52.99	600.00		300.00	-	300.00
6701-11 Property Support-Heating oil	19,291.69	20,000.00		15,000.00	-	15,000.00
6703-11 Property Support-Water	536.64	200.00		100.00	-	100.00
6705-11 Property Support-Electricity	5,312.10	12,000.00		6,000.00	-	6,000.00
6750-11 Property Support-Insurance	-	18,000.00		9,000.00	(9,000.00)	-
6990-11 Property Support-Depreciation expense	13,755.00	-		-	9,000.00	9,000.00
	<u>115,577.51</u>	<u>127,300.00</u>	<u>90.79%</u>	<u>105,650.00</u>	<u>-</u>	<u>105,650.00</u>
				<b>p.1 line 28</b>		<b>p.1 line 28</b>

**ORTHODOX CHURCH IN AMERICA**

Proposed 2026 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>12/31/2025</b>	<b>2025</b>	<b>USED</b>	<b>Original 2026</b>	<b>Amendments</b>	<b>Amended 2026</b>
6010-35 Sexual Misconduct Committ-Salaries	-	-		-	-	-
6012-35 Sexual Misconduct Committ-FICA/MED	-	-		-	-	-
6013-35 Sexual Misconduct Committ-Unemployment Ins W/H	-	-		-	-	-
6015-35 Sexual Misconduct Committ-Health Insurance	-	-		-	-	-
6016-35 Sexual Misconduct Committ-Workers Compensation/Dis	-	-		-	-	-
	-	-		-	-	-
6095-35 Sexual Misconduct Committ-Bank Fees	-	-		-	-	-
6215-35 Sexual Misconduct Committ-Outside Contract Services	571.55	36,000.00		36,000.00	-	36,000.00
6502-35 Sexual Misconduct Committ-Postage, Mailing Service	-	68.00		68.00	-	68.00
6504-35 Sexual Misconduct Committ-Supplies	-	-		-	-	-
6650-35 Sexual Misconduct Committ-Stipends	30,000.00	-		-	-	-
6832-35 Sexual Misconduct Committ-Travel	602.00	600.00		600.00	-	600.00
6832-35 Sexual Misconduct Committ-Other Admin Expense	20.50	-		-	-	-
	<u>31,194.05</u>	<u>36,668.00</u>	<u>85.07%</u>	<u>36,668.00</u>	<u>-</u>	<u>36,668.00</u>
				p.1 line 36		p.1 line 36

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2026 Budget - Expenses by Department

	<b>YTD Actual</b>	<b>BUDGET</b>	<b>% BUDGET</b>	<b>BUDGET</b>		<b>BUDGET</b>
	<b>12/31/2025</b>	<b>2025</b>	<b>USED</b>	<b>Original 2026</b>	<b>Amendments</b>	<b>Amended 2026</b>
6215-13 Communications-Outside Contract Services	11,857.50	20,000.00		5,000.00	7,000.00	12,000.00
6503-13 Communications-Printing and Copying	-	-		-	-	-
6650-13 Communications-Stipends	28,140.00	1,800.00		27,000.00	-	27,000.00
6670-13 Communications-Computer expense	-	2,500.00		2,500.00	-	2,500.00
6733-13 Communications-Website	20,033.46	12,000.00		12,000.00	8,000.00	20,000.00
6832-13 Communications-Travel	-	-		-	-	-
	<u>60,030.96</u>	<u>36,300.00</u>	<u>165.37%</u>	<u>46,500.00</u>	<u>15,000.00</u>	<u>61,500.00</u>
				p.1 line 29		p.1 line 29
6105-14 Holy Synod-Food	-	-		-	-	-
6502-14 Holy Synod-Postage	60.20	-		-	-	-
6503-14 Holy Synod-Printing	181.97	1,000.00		1,000.00	-	1,000.00
6504-14 Holy Synod-Supplies	84.22	-		-	-	-
6650-14 Holy Synod-Stipends	14,400.00	14,400.00		14,400.00	-	14,400.00
6831-14 Holy Synod-Conference, Convention, Meeting	20,047.24	-		-	20,000.00	20,000.00
6832-14 Holy Synod-Travel	18,076.77	25,000.00		25,000.00	(7,000.00)	18,000.00
6833-14 Holy Synod-Lodging	16,806.63	20,000.00		20,000.00	(3,000.00)	17,000.00
6834-14 Holy Synod-Meals	4,082.47	8,000.00		8,000.00	-	8,000.00
6903-14 Holy Synod-Gasoline	74.56	-		-	-	-
	<u>73,814.06</u>	<u>68,400.00</u>	<u>107.92%</u>	<u>68,400.00</u>	<u>10,000.00</u>	<u>78,400.00</u>
				p.1 line 30		p.1 line 30
6015-15 Metropolitan's Office-Health Insurance	10,051.27	-		-	10,000.00	10,000.00
6051-15 Metropolitan's Office-Charity Distribution	350.00	-		-	-	-
6105-15 Metropolitan's Office-Food	1,114.54	-		-	-	-
6110-15 Metropolitan's Office-Liturgical Items	11,484.99	8,000.00		8,000.00	-	8,000.00
6280-15 Metropolitan's Office-Rent	43,050.00	42,600.00		42,600.00	-	42,600.00
6504-15 Metropolitan's Office-Supplies	1,046.33	750.00		750.00	-	750.00
6516-15 Metropolitan's Office-Misc Other	273.39	-		-	-	-
6650-15 Metropolitan's Office-Stipends	1,200.00	-		-	-	-
6701-15 Metropolitan's Office-Heating Oil	691.16	-		-	-	-
6703-15 Metropolitan's Office-Water	767.83	2,100.00		2,100.00	-	2,100.00
6705-15 Metropolitan's Office-Electricity	492.23	1,440.00		1,440.00	-	1,440.00
6727-15 Metropolitan's Office-Internet	974.28	864.00		864.00	-	864.00
6750-15 Metropolitan's Office-Insurance	-	793.00		793.00	-	793.00
6831-15 Metropolitan's Office-Conf., Convention, Meeting	381.94	-		-	-	-
6832-15 Metropolitan's Office-Travel	30,800.36	35,000.00		40,000.00	-	40,000.00
6833-15 Metropolitan's Office-Lodging	3,073.02	5,000.00		5,000.00	-	5,000.00
6834-15 Metropolitan's Office-Meals	1,955.10	2,000.00		2,000.00	-	2,000.00
6900-15 Metropolitan's Office-Automobile	1,655.65	600.00		600.00	-	600.00
6903-15 Metropolitan's Office-Auto Gasoline	1,215.38	-		-	-	-
6902-15 Metropolitan's Office-Other Discretionary	-	3,000.00		3,000.00	-	3,000.00
	<u>110,577.47</u>	<u>102,147.00</u>	<u>108.25%</u>	<u>107,147.00</u>	<u>10,000.00</u>	<u>117,147.00</u>
				p.1 line 31		p.1 line 31
6051-16 Metropolitan Council-Charity Distribution	-	-		-	-	-
6110-16 Metropolitan Council-Liturgical Items	17,980.00	-		-	-	-
6215-16 Metropolitan Council-Outside Contract Svcs	-	-		-	-	-
6504-16 Metropolitan Council-Supplies	50.40	50.00		50.00	-	50.00
6832-16 Metropolitan Council-Travel	5,036.47	12,000.00		12,000.00	-	12,000.00
6833-16 Metropolitan Council-Lodging	11,849.72	18,000.00		18,000.00	-	18,000.00
6834-16 Metropolitan Council-Meals	2,011.61	2,400.00		2,400.00	-	2,400.00
	<u>36,928.20</u>	<u>32,450.00</u>	<u>113.80%</u>	<u>32,450.00</u>	<u>-</u>	<u>32,450.00</u>
				p.1 line 32		p.1 line 32

**ORTHODOX CHURCH IN AMERICA**  
Proposed 2026 Budget - Expenses by Department

	YTD Actual 12/31/2025	BUDGET 2025	% BUDGET USED	BUDGET Original 2026	Amendments	BUDGET Amended 2024
6017-17 St Catherine's Representa-Pension expense	14,181.74	9,558.02		9,558.02	1,062.00	10,620.02
6502-17 St Catherine's Representa-Postage, Mailing				-	-	-
6650-17 St Catherine's Representa-Stipends	52,908.96	53,100.12		53,100.12	-	53,100.12
6832-17 St Catherine's Representa-Travel				-	-	-
	<u>67,090.70</u>	<u>62,658.14</u>	107.07%	<u>62,658.14</u>	<u>1,062.00</u>	<u>63,720.14</u>
				<i>p.1 line 33</i>		<i>p.1 line 33</i>
6050-30 Missions and Planting Gra-Distributions	80,000.04	80,000.00	100.00%	104,000.00	-	104,000.00
				<i>p.1 line 34</i>		<i>p.1 line 34</i>
6215-34 Ordination Candidate Test-Outside Contract Services	7,000.00	5,000.00	140.00%	5,000.00	3,000.00	8,000.00
				<i>p.1 line 35</i>		<i>p.1 line 35</i>
6050-40 Seminaries-Distributions	18,000.00	18,000.00	100.00%	18,000.00	-	18,000.00
				<i>p.1 line 37</i>		<i>p.1 line 37</i>
6017-80 Ministries-Pension Expense	7,138.00					
6052-80 Ministries-Mission Distribution						
6096-80 Ministries-Dues	1,030.00	1,400.00		1,400.00	-	1,400.00
6215-80 Ministries-Outside Contract Services	3,000.00	1,014.00		1,014.00	-	1,014.00
6253-80 Ministries-Program Supplies		-		-	-	-
6503-80 Ministries-Printing and Copying		501.00		501.00	-	501.00
6504-80 Ministries-Supplies		3,900.00		3,900.00	-	3,900.00
6650-80 Ministries-Stipends	109,740.00	92,100.00		102,100.00	-	102,100.00
6733-80 Ministries-Website		1,830.00		1,830.00	-	1,830.00
6831-80 Ministries-Conference, Convention, Meeting	182.02	1,500.00		1,500.00	-	1,500.00
6832-80 Ministries-Travel	562.00	7,500.00		7,500.00	-	7,500.00
	<u>121,652.02</u>	<u>109,745.00</u>	110.85%	<u>119,745.00</u>	<u>-</u>	<u>119,745.00</u>
				<i>p.1 line 38</i>		<i>p.1 line 38</i>
<b>Office of Pastoral Life</b>						
<i>Administration</i>						
6017-40 OPL-Pension Expense						
6214-40 OPL-Legal Fees						
6215-40 OPL-Outside Contract Services					-	-
6253-40 OPL-Program Supplies					-	-
6501-40 OPL-Books, Subscriptions, Dues					-	-
6650-40 OPL-Stipends					-	-
6733-40 OPL-Website					-	-
6831-80 OPL-Conference, Convention, Meeting					-	-
6832-40 OPL-Travel					-	-
6833-40 OPL-Lodging					-	-
6834-40 OPL-Meals					-	-
6050-40 OPL-Distributions					-	-
<i>Clergy Synaxis</i>						
6215-40 Clergy Synaxis-Outside Contract Services					-	-
6650-40 Clergy Synaxis-Stipends					-	-
<i>Clergy Wives</i>						
6215-40 Clergy Wives-Outside Contract Services					-	-
6502-40 Clergy Wives-Postage, Mailing Service					-	-
6504-40 Clergy Wives-Supplies						
6650-40 Clergy Wives-Stipends					-	-
6733-40 Clergy Wives-Website					-	-
6832-40 Clergy Wives-Travel					-	-
6833-40 Clergy Wives-Lodging					-	-
6834-40 Clergy Wives-Meals					-	-
	<u>-</u>	<u>-</u>		<u>-</u>	<u>-</u>	<u>-</u>
				<i>See OPL page</i>	<i>See OPL Amended page</i>	

**Orthodox Church in America**  
**Office of Pastoral Life**  
 Budget 2026

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

**Orthodox Church in America**  
**Office of Pastoral Life**  
 AMENDED Budget 2026

Expenditures	Clergy Wives			Total 40 OPL	800 TIM Lilly	805 FHI Lilly	TOTAL
	40 OPL	Synaxis	Group		Grant	Grant	
6010 Salaries							
OPL Director	49,199.93			49,199.93	33,209.95	40,589.94	122,999.81
Director of Operations	-			-	-	-	-
Director of Development	-			-	17,000.00	17,000.00	34,000.00
6012 FICA/MED							
6013 Unemployment Ins W/H							
6014 Payroll Processing Fees							
6015 Health Insurance	6,829.10			6,829.10	4,609.64	5,634.00	17,072.74
6016 Workers Compensation/Disability	126.08			126.08	85.10	104.01	315.20
6017 Pension expense	6,398.50			6,398.50	4,318.99	5,278.77	15,996.26
<i>Salaries &amp; Benefits Subtotal</i>	<u>62,553.60</u>	-	-	<u>62,553.60</u>	<u>59,223.68</u>	<u>68,606.72</u>	<u>190,384.01</u>
				p.1 line 20	p.2 line 8	p.2 line 23	
6050 Distributions - Grants & Endowments				-		172,500.00	172,500.00
6100 Office expense				-			-
6211 Accounting Fees				-	4,000.00	4,000.00	8,000.00
6214 Legal Fees				-			-
6215 Outside Contract Services							
Evaluations Consultant	5,000.00			5,000.00	-	1,500.00	6,500.00
Communications Consultant	6,500.00			6,500.00	7,000.00	21,600.00	35,100.00
Strategy Consultant - OMS				-	2,000.00	10,000.00	12,000.00
Educators					4,000.00		4,000.00
Technology Consultant	12,000.00			12,000.00	-	-	12,000.00
6251 Conferences/Space Rental				-			-
6253 Program Supplies				-		4,724.00	4,724.00
6501 Books, Subscriptions, Dues				-			-
6502 Postage, Mailing Service	500.00		2,500.00	3,000.00	200.00	500.00	3,700.00
6503 Printing and Copying	1,000.00		2,500.00	3,500.00			3,500.00
6504 Supplies	1,500.00		-	1,500.00		2,500.00	4,000.00
6650 Stipends	26,000.00	25,000.00	28,500.00	79,500.00	144,120.00	30,000.00	253,620.00
6654 stipend				-			-
6671 Computer software expense	2,500.00			2,500.00	3,000.00	3,000.00	8,500.00
6831 Conference, Convention, Meeting	1,000.00	12,660.00	6,000.00	19,660.00			19,660.00
6832 Travel	9,000.00		1,500.00	10,500.00	21,760.00	5,000.00	37,260.00
6833 Lodging			750.00	750.00	6,247.50	2,800.00	9,797.50
6834 Meals	750.00		500.00	1,250.00	12,834.00	1,770.00	15,854.00
6900 Automobile			200.00	200.00			200.00
<i>Goods &amp; Services Subtotal</i>	<u>65,750.00</u>	<u>37,660.00</u>	<u>42,450.00</u>	<u>145,860.00</u>	<u>205,161.50</u>	<u>259,894.00</u>	<u>610,915.50</u>
				p.1 line 39	p.2 line 9	p.2 line 24	
<b>Total Expenditures</b>	<b>128,303.60</b>	<b>37,660.00</b>	<b>42,450.00</b>	<b>208,413.60</b>	<b>264,385.18</b>	<b>328,500.72</b>	<b>801,299.51</b>

**Orthodox Church in America  
2025 Internal Audit Report**

Matushka Sharon Hubiak, Chair  
Maha Adranly, Member  
Diane Dorogy, Member

February 27, 2026

The Holy Synod of Bishops and Metropolitan Council  
Orthodox Church in America  
PO Box 31409  
Alexandria, VA 22310-9998

Your Beatitude, Your Eminences, Your Graces, Brothers and Sisters in Christ:  
Most Blessed Master Bless!

The Orthodox Church in America's (OCA's) administration is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Our purpose as the internal audit committee is to evaluate the OCA's risks, controls, and processes to ensure compliance with laws, regulations, and internal policies, to safeguard the OCA's assets, identify potential issues, and provide recommendations to improve operational efficiency and enhance the OCA's control environment.

The Internal Audit Committee began preparing for the audit at the end of January and were able to meet in person at the Chancery office in Springfield, Virginia from February 17, 2026, to February 18, 2026, to perform further review and follow-up.

During the 2025 Audit, we worked with the Treasurer to ensure internal controls were followed for the Accounting and Finance Operations of the OCA. Items we reviewed were to ensure that no material misstatements, errors or fraud were detected.

- All bank and investment accounts are reconciled and are properly reported.
- Expense categories that had large variances year over year.
- All expenses are properly documented ie; have receipts or support attached.
- Accounts payable and accounts receivable don't have aged items.
- Permanent & Restricted funds are reported correctly.
- Payroll & Stipend expenses are reported correctly.
- Stavropegial institutions accurately represent the financial status of the organizations.
- Financial motions from Metropolitan Council meetings are executed correctly.
- Disposition of items identified in last year's Internal Audit Report as well as new processes and controls have been implemented.

In all areas that we looked at, all were in good order with some items and recommendations we have listed below.

**2024 Recommendation Status:**

We confirmed many suggestions from the 2024 audit have been implemented. There are still some items that need attention:

- Several receipts for AMEX charges were not readily available. Where possible, we recommend using

## **Orthodox Church in America 2025 Internal Audit Report**

Bill.com because it provides more streamlined upload of receipts and integration into accounting software.

- Especially for the Lilly grant, there are expenses which have no receipts or documentation attached.
- Policies & Procedures still require review & update. Among other policies, we suggest a gift giving policy be included.

### **2025 Recommendation:**

#### **Grants**

The following findings relate specifically to grant compliance and reporting requirements.

##### Expense Documentation

- Split expenses require improved documentation. Each line item must have independent supporting documentation tied to the underlying receipt, and the sum of all splits must equal the receipt total.
- Credit card receipts showing only a dollar amount do not meet OCA documentation requirements. All receipts must include the vendor's name, transaction date, and a description of goods or services. A credit card total may supplement but cannot replace itemized documentation.

##### Grant Continuity Planning

- The Thriving in Ministry grant is expected to end in approximately two years. A transition plan should be developed now to address ongoing program costs — including administrative expenses and software licenses — that may continue beyond the grant period.

#### **General Audit Findings**

##### Credit Card Charges

- Some meal receipts remain incomplete per IRS requirements. Cardholders should be reminded that all meal receipts must include the vendor's name, transaction date, and names of all attendees. This applies to all organizational meetings, including Metropolitan Council, Chancery, Holy Synod, and OPL.
- Use of the "Miscellaneous – Other" category in Bill.com has increased. Cardholders should select specific expense categories to improve tracking and support accurate budgeting.
- Receipts must reflect transaction details, not just the total. For example, the Verizon bill should list all phone lines included. Currently six lines appear on the invoice, but ownership could not be confirmed.
- Several AMEX receipts were not readily accessible. Bill.com should be used wherever possible, as it provides a more streamlined receipt upload process and integrates directly with accounting software.

##### Stipends

- Many stipend records are described only as "monthly stipend." Each entry should specify the stipend's purpose (e.g., Office of Pastoral Life (OPL), Diaconal/Late Vocations (DVP)).

##### Operations & Internal Controls

- Expense approvals are currently stored across Andrew's OCA.org email and Bill.com. We recommend forwarding all approval emails to a dedicated address for archiving in BOX, centralizing records and improving accessibility for future audits.
- Policies and procedures should be reviewed and updated. A formal gift acceptance policy should be added.
- Consider consolidating underutilized bank accounts into the operating account (e.g., TD Bank All American, TD St. Sergius Chapel) if separate accounts are no longer needed.
- Internal audit currently has no means to assess whether internal controls are in place at non-audited Stavropegial institutions. We recommend establishing a process for future auditors to connect with non-audited Stavropegial institutions to assess their internal financial controls.

##### Action Items

- There were two 2025 Expense items for Ramsey Solutions & Robert Sater for approximately \$7K in

**Orthodox Church in America  
2025 Internal Audit Report**

total identified in Misc Other Expenses. Chazin was advised to reclass the transactions to Consulting expenses.

- Include in the new policies & procedures guidelines on using the AMEX credit card to ensure most expenses are flowing through Bill.com.
- Obtain the missing receipt for the \$178.44 Verizon charges relating to Internet for Archive function at Syosset covering 2022 - 2024
- Confirm ownership of the six Verizon phone lines.
- Determine whether restricted funds under \$1,000 can be released or closed out.

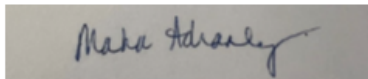
In closing, we would like to thank especially Andrew Smith, Very Reverend Alessandro Margheritino, the Chazin Accounting Team, and the Chancery Staff for their promptness in replying to our requests and their great attention to detail regarding the finances of the Orthodox Church in America. If you have any questions or require additional details regarding our findings, please let us know.

Yours in Christ,

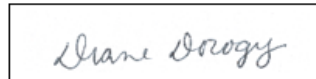
Matushka Sharon Hubiak, Chair

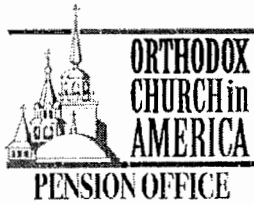


Maha Adranly, Member



Diane Dorogy, Member





Pension Office  
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Tel/Text: 516-464-0322  
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March 10, 2026

Your Beatitude, honorable clergy, and lay members of the Metropolitan Council:

Since our last report in Fall 2025, we have made substantial leaps forward in the health of the Pension Plan. The board welcomed His Grace, Bishop Benedict, who has replaced His Grace, Bishop Gerasim. We thank Bishop Gerasim for his guidance and inspiration during his time on the board. The board continues to work diligently and with good camaraderie and fellowship. Our administrator, Michael Stieglitz, continues yeoman work, putting in well over 40 hours per week in administrating the Plan and providing outstanding customer service.

### **Investment Performance**

The Pension Plan assets remain invested in a diversified portfolio of equities, fixed income, and alternative investments. The monthly contributions continue to exceed the monthly benefits payable. For calendar year 2025, we were able to **add \$585k** to our investment account. We have budgeted **\$605k** further investment additions in 2026. Please remember that from the years 2008-2024, before the current almost 100% participation (only reached in 2025), we had to remove approximately **\$15,000,000** from investments to pay benefits! Please refer to the cash flow detail schedule.

The marketable securities portfolio, including the low volatility portion, managed by Morgan Stanley, earned **7.99%**, net of fees for the calendar year ending December 31, 2025. This compares to 16.1% earned for the same period by our relative benchmark representative of an asset allocation of 60% global equities, 35% intermediate bonds, and 5% cash. *Our actuarial benchmark for the Plan is 7%, so we outperformed our benchmark by almost 1%.* The Pension Board has delegated review of the circumstances explaining the difference between our actual earnings and the higher return indicated by our benchmark portfolio to a sub-group of the Board, including members with investment industry experience, to work with the Board's investment advisors at Morgan Stanley.

The performance of non-marketable alternative investments is subject to delayed reporting of 1 to 5 months and therefore their recent performance is not yet reflected in the above Plan's total performance. Because of this, the Plan's performance is best evaluated over a longer period of time. These investments produced an average net return of 6.98% per year during the 3-year period ending September 30, 2025.

**Confidential Information Redacted on Advice of Counsel.**

Total Plan assets as of January 1, 2025 were \$26,648,556.  
Total Plan assets as of January 31, 2026 were \$29,405,984.

**Participation**

As of February 10, 2026, there were 420 active participating members (including 60 members who participate via more than one employer) and 12 inactive members for a total of 432 active/inactive participants. In addition, there are currently 245 total monthly benefits recipients. (Some recipients may be sharing one deceased member's benefit, as in the case of children sharing a parent's benefit.)

Additionally, the amendment mandating parishes to contribute the employer 14% portion to the Plan monthly if they have inactive members, ineligible members, and/or non-compliant members became effective January 1, 2025, for the parish employer portion. At the Spring 2025 Metropolitan Council meeting, there were 326 active parishes contributing to the Plan. As of February 10, 2026, 376 parishes are enrolled in the system and remitting or preparing to remit the parish portion.

**Actuarial Valuation**

Our actuarial firm Gabriel, Roeder, Smith & Company (GRS) has prepared a valuation report for the Plan as of January 1, 2026. This report will not be finalized and presented to the Pension Board until our June 15-16, 2026 meeting. Although we are not where we want to be from an actuarial standpoint, we continue to make progress.

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

Projected funded ratio went from 66.1% in 2023 to 74.1% in 2024 to 79.6% in 2025 to (projected) 83.1% in 2026. Actuarial projection is fully funded in 2036 (100%) without any other net additions; sooner if we grow membership. That is one year **earlier** than anticipated at the Fall 2025 Metropolitan Council meeting.

Funding shortfall improved 7.2% of pay, from 14.1% of pay in 2023 to 6.9% of pay in 2025 (more than half!)

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

Non-investment cash flow (contributions minus benefit payments and expenses) improved from (\$1,559,000) in 2022 to (\$758,200) in 2023 to \$82,257 in 2024 to \$538,056 in 2025 (i.e., negative to positive cash flow).

### **Agreed-Upon Procedures**

Barnes Wendling CPAs, the Pension Plan's independent accounting firm, has been engaged to perform an Agreed-Upon Procedures (AUP) engagement for 2026 at the same fee charged for the 2023 report.

### **Administration**

Michael Stieglitz continues to work with anyone wishing training on the MARC system. He is available upon request to demonstrate the system capabilities and train personnel to input the compensation data, calculate the contribution amounts, and locate historical parish information. Michael is also available to prepare customized individual projections of termination and retirement benefits. Michael has updated the MARC system for all new participants and parishes onboarding. We appreciate the assistance from the Dioceses and cooperation from the parishes which has allowed us to make the progress indicated. **As a reminder, any member can text the office or text the Pension Administrator Michael Stieglitz directly at 516-464-0415.**

### **RFI**

As part of our continuing efforts at due diligence, we are undertaking a review of all our vendors and seeking information from similar providers as a measuring stick to gauge the cost and services provided by our current vendors, ensuring that we are good stewards of the funds used to administer the Plan. This began back in 2023 when we determined that a change in actuarial company was advisable. Our RFP (request for proposal) to other firms led to the choice of Gabriel, Roeder, Smith & Company (GRS) as our current actuaries. We are quite pleased with their service and the cost is competitive with or better than any other firm. They also specialize in our type of plan.

We are beginning the review of both our legal counsel and investment advisor services. Both Joseph Semo, Esq. and Morgan Stanley, through our advisor Warren Rivetz, have provided long and excellent service to us.

**Proposed Plan Amendments**

The Pension Board has proposed amendments to the Plan to be discussed at this meeting (see separate attachments).

**Specific requests for the Metropolitan Council**

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

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

- A. Gabriel, Roeder, Smith & Company - Actuaries. No new exhibits at this time.
- B. Barnes Wendling CPAs. No new exhibits at this time.
- C. Cash flow
- D. "Dashboard" of funding and membership
- E. Administrative expenses detail
- F. Participation statistics
- G. Clergy-Parish Non-participating by Diocese Summary
- H. Proposed amendments to the Plan

**Conclusion**

We pray that the Lord bless our combined continued efforts at providing some financial stability for our laborers blessed enough to retire. Please keep us in your prayers.

Respectfully yours in Christ, The Pension Board

His Grace, Bishop Benedict, Episcopal Moderator  
Bishop of Hartford and New England

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

## **REPORT REGARDING PENSION BOARD MEETINGS**

The Pension Board had a meeting in New York on December 15 and 16, 2025. I attended as the MC liaison. Due to weather issues, Matushka Tamara attended via zoom. Bp. Gerasim, the former Synod representative and Bp Benedict, the new Synod representative were both present.

Much of the first day was an executive session and I was a participant for a portion of that day. The only document which I had was a portion of the agenda but I was shown portions of documents/reports on monitors from adjacent board members as the reports were given. I was told that the reports will be provided to the MC as attachments to the report which will be produced by the PB.

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The first report was from Warren Rivetz, the managing person for the Plan from Morgan Stanley. The Plan investments are in compliance with the Investment Policy statement in all respects. The low volatility reserve has been reduced since the Plan contributions now exceed the benefits paid and administrative expenses. They are maintaining approximately a \$500,000 balance for possible emergencies so that investments will not need to be sold.

There was an extensive discussion regarding the nature of the investments and possible alternative investments.

After the report had been concluded and Mr. Rivetz had been released, the discussion regarding the nature of the investments continued.

The PB decided to request proposals from financial advisors since it had been many years since this had been done.

In addition, the PB appointed a committee to consider investment alternatives now that the contributions exceed the benefit payments and administrative expense.

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The meeting continued on December 16 and the first report was from the Auditors.

This report was for year-end 2024. The prior audits had only checked the Plan finances and the audit procedures were checked.

They did verify that proper procedures were followed once contributions were received. They did not know if the amounts received were correct. The suggestion was that the Plan should receive notice of new employees, and copies of W-2, 1099 reports as well as information to confirm eligibility.

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The actuary firm, GRS, made the next report.

They will make a complete analysis once they had all of the information for 2025. Normally, the report for this year would be an abbreviated report but, due to the substantial changes during the past year, a complete analysis will be performed.

They verified the assumptions which were utilized in their evaluation for the period of time from 2021 into 2025 and found that the assumptions were on track. The 7% anticipated rate of return was reasonable. Similarly, the economic assumptions of 2 ½% inflation, administrative expense of 2% and the future interest rates were reasonable.

They need further information to verify the demographic assumptions, e.g., pay increase adjustments, withdrawal decreases, retirement increases, mortality rates, contributions based upon increased pay, and will address all of the assumptions in the new report once the information is received.

The projected Plan higher future payments compared by the projected higher contributions are essentially a wash.

They have not included the employer only contributions in their figures so far since they needed to have a full year of information finalized.

The projected funding will be approximately 81.4% at year-end. The projected full funding date is 2036. These projections will be finalized in the report after all information has been received and analyzed.

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The administrative report by Michael Stieglitz showed that the employer only contributions were \$232,699 which would lead to a cash flow of \$916,699 which permitted a conveyance of \$585,000 to the investments rather than the past history of withdrawals from investments.

There were 420 active members included ten over age 65 and in pay status. There were a total of 478 employers as some of the members had multiple employers. There had been a 38 net increase in members. The average age of the participating members is 50.

The PB has adopted some proposed amendments to the Plan in executive session. I was not provided any information regarding these, other than that they concern some corrections from the last amendments which were approved by the MC. Their position is that amendments by the MC

to the PB proposals are not permitted and that the MC must only adopt amendments proposed by the PB or reject them. The proposed amendments will be provided in the PB report.

The meeting was then concluded.

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There was another meeting by Zoom on February 10, 2026. I attended as the MC liaison. Fr. Alessandro attended as the chancery liaison. Again, I only had a portion of the agenda and no other reports or documents.

The first portion of the meeting was in executive session and neither I nor Fr. Alessandro were present.

There was discussion regarding the benefit for everyone with the communications and information being shared.

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Michael Stieglitz provided an administrative summary.

The information which he had provided in the December meeting was essentially the same. There were some additional expenses paid in January 2026 for 2025. Some of these, primarily the attorney fee and the actuary fee, had been increased due to the reports prepared for the AAC. The budget for 2026 which had been adopted in executive session called for administrative expenses of 1.88%, less than the assumed expense of 2%.

Membership is continuing to increase and there are additional contributions from employer only contributors. There are now approximately a 2 to 1 number of member contributors to the number of recipients.

It is projected that they will be able to transfer \$605,000 from contributions to investments in 2026. The average age of the members is now less than 50.

The PB reviewed the Joe Semo contract and concluded that they will continue with him.

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### CONCLUSIONS/RECOMMENDATIONS

All of the PB members were very involved and the Plan is in good hands. They have reviewed most of the experts employed by them and will do so for financial advisors,

These were good meetings and substantial progress is being made. It would be much more productive for me if I received a copy of the reports. I had received them in the past and not receiving them prevents me from being able to ask questions or to fully understand the reports since I now only

have access, through the courtesy of the members, of portions of pages as they were being discussed.

The Plan is viable and the continued enforcement of the mandate is absolutely required.

Yours in Christ,  
David Lane  
MC Liaison

**Report for the Metropolitan Council: Spring 2026**  
**Departments of the Orthodox Church in America**  
**Archpriest Justin Patterson, Project Manager for Departments**

**Background**

Having been “on the job” now as Project Manager for the Departments for more than half a year (since September 1, 2025) I can report making some real progress in understanding both the possibilities and the challenges facing the Departments of the OCA. As you will see below in the body of my report, most of the work I have been able to do in my time as fractional coordinator for the Departments has been targeted on just three of our five Departments.

As coordinator for Departmental work, the purpose of my work is two-fold:

1. To connect people in the OCA who are doing ministry work that relates to the Departmental categories to each other. I do this by answering email, by knowing the people who “do things,” and by trying to connect them. This is very much behind the scenes work.
2. To commission and manage a few projects (limited tasks) within the Departmental structures that the OCA can fund and launch.

I am always keeping my eye out for new opportunities that might be “easy wins” for our Church. Working within the real constraints of budget and time, I still hope to:

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

**Department of Evangelization**

At the last Metropolitan Council meeting, it was clear that my main departmental priority for the upcoming season was the revision of the flagship program of the Department – the **Church Planting Grant**. Additionally, His Beatitude and the OCA officers asked me to prepare proposals for a **further grant** that will help us wisely steward the Evangelization fund the OCA has on hand.

With the blessing of His Beatitude, the OCA officers and I convened an “ad hoc committee” of leading clergy across the OCA to help us ask the right questions about both the Church

Planting Grant and to help us explore other grants ideas. Our committee met from November 2025 through this past February several times and reviewed various approaches. Working fruitfully together with both the officers and this group, I can report that we have:

- crafted a **revised Church Planting Grant** plan and application
- crafted a working draft for a **pilot-program Parish Revitalization Grant**
- discussed and laid the groundwork for further grant proposals that might be taken up in the near future.

I am presenting some preliminary findings and recommendations. Once these are finalized further, they will be presented to the Metropolitan Council for consideration.

### **The (Revised) Church Planting Grant Program for 2027**

The revised Church Planting Grant packet is very similar to the old packet with three important changes or shifts in emphasis:

1. There is a significant change in the **way the grant is structured financially**. While the 3-Year step-down approach remains, the grant amounts are variable depending up the cost-of living in different areas.
  - a. In Year 1, the Church Planting Grant would supply **50%** of the priest package (salary, benefits, and pension.) The cap for the OCA contribution would be **\$60,000**.
  - b. In Year 2, the Church Planting Grant would supply **40%** of the priest package (salary, benefits, and pension.) The cap for the OCA contribution would **\$48,000**.
  - c. In Year 3, the Church Planting Grant would supply **25%** of the priest package (salary, benefits, and pension.) The cap for the OCA contribution would be **\$30,000**.

While some applicant parishes in very high-cost areas may propose a compensation package of up to \$120,000 (with a corresponding OCA match of \$60,000), the Department recognizes that most applicants will request a smaller match. In many cases, the compensation packages offered will be below \$120,000, consistent with the OCA Clergy Compensation Guidelines. For most parishes, applicants will simply indicate the salary and benefits they are prepared to offer their priest, along with the amount requested from the OCA. The requested support will then be calculated according to the grant percentages outlined above for each year of the program.

2. We propose that the grant allows missions to apply whose priest might have part-time or fractional employment. While the Department remains committed to the emphasis on full-time work as a condition for the grant, we have had a few excellent candidates over the years who have had a small teaching role or special tasks working for the Church, or other fractional roles

– that are actually quite compatible with full-time ministry. Going forward, we are simply asking each candidate to disclose any additional employment – and our selection committee will include that information in our decision-making process (which the MC and Synod are both a part of.)

### **The (Pilot) Parish Revitalization Grant Program for 2027**

For many years, diocesan and OCA leadership has requested that our Department of Evangelization create a Parish Revitalization Grant. As you can imagine, there are many ways to approach this potential grant. Our team has chosen to suggest a few approaches that – we hope – will prove helpful, acceptable, and not controversial. A complete draft has been made and is undergoing detailed review at present.

1. The proposed Parish Revitalization Grant is designed for parishes *already involved in revitalization* (and that can demonstrate that commitment in the application and in the parish council surveys.)
2. Applying parishes must demonstrate strong diocesan, clergy, and lay participation in the application process (noting financial commitments from both the diocese and lay leaders.)
3. Applying parishes must demonstrate strong demographic potential.
4. The Parish Revitalization Grant would be modeled on our successful flagship Church Planting Grant with a focus on securing full-time remuneration for the priest. The grant could be applied for by a parish in the midst of securing a full-time priest or a parish trying to bring their priest into full-time work for renewed growth and outreach.
5. The standards for full-time work (and disclosure of any fractional work) are identical to those of the Church Planting Grant.
6. The Parish Revitalization Grant would be structured financially over 3 years like the Church Planting Grant but with caps of \$50,000, \$40,000, and \$25,000 in each year of the grant.

Each diocese may only nominate one parish per year to be considered for this grant.

### Department of Liturgical Music & Translations:

The DLM remains the most consistently productive of the OCA's departments. I have enjoyed working with Project Leads Dr. Vladimir Morosan (setting texts) and Priest Philip Ritchey (creating texts.)

The DLM's work is coordinated by the Project Manager with the blessing of the episcopal liaison from the Holy Synod, His Grace Bishop Benedict of New England. The Department also leans on the expertise of Priest John Mikitish, who serves as His Beatitude's secretary and representative at the DLM.

The Department pays modest stipends to seven collaborators, at present – all involved in some aspect of reviewing rubrics, creating texts, and setting music. I'm particularly grateful to Prof. Morosan for his expertise and depth of institutional knowledge. He is a treasure of the OCA.

In my oral presentation, I can speak further about some goals the DLM has for the next six months or so.

### Department of Christian Education:

Over the past six months, the main focus of DCE has been continuing to develop **new curriculum for children at various age levels** that tracks with the EOCB program (the catechesis previously commissioned by Fr. Thomas Soroka and now available on OCA.org). Our main collaborator for this project is Kelly Potteiger in Pennsylvania. She is working at the promised pace and the budgetary support for this project has been renewed for this coming year. You can see the Department's ongoing work so far here:

<https://dce.oca.org/new-curriculum>

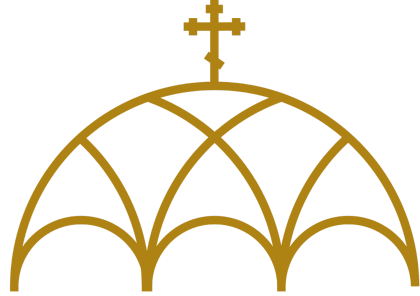
I have had extensive conversations with clergy about possibly creating a new **OCA Video Catechesis Series**. But these conversations are still preliminary. There are definitely many requests that come to us about the Department offering more in the way of Adult Education, particularly with regard to media resources.

### Department of Youth, Young Adults, & Campus Ministry:

Through the Department of Youth, the Orthodox Church in America has committed to grant a scholarship, up to \$700, to one applicant per Diocese to attend the Suprasl Conference in Poland in summer 2026

### Department of Christian Service & Humanitarian Aid

There is nothing to report at present. There is no standing committee and no real portfolio of operations for this Department.



# Office of Pastoral Life

— ORTHODOX CHURCH IN AMERICA —



Clergy Wives



FINANCIAL HEALTH INITIATIVE  
for OCA Clergy Families



Thriving in Ministry



Synaxis



## Office of Pastoral Life Spring 2026 Meeting

### Executive Summary

The Office of Pastoral Life continues to see steady engagement and growth across its core initiatives. Thriving in Ministry remains strong, and current conversations focus on how long-standing groups can move toward healthy independence so that new groups may form without overextending capacity. The first cohort of the Financial Health Initiative has now been formally evaluated, confirming meaningful gains in budgeting discipline, reduced financial stress, stronger marital communication, and greater confidence in pastoral leadership around stewardship. Synaxis continues to provide a consistent space for clergy connection, and the recent leadership transition within the Clergy Wives Ministry, though difficult at points, has resulted in clearer integration within the broader clergy care work of the Office. At the same time, real challenges remain as we help to strengthen our clergy and their families: long-term financial sustainability beyond grant funding, maintaining participation if incentives diminish, and ensuring that growth does not outpace our ability to support it responsibly. The work is steady and necessary, but it requires continued discernment and support.

### Development

A part-time Development Director joined the Office in mid-December 2025. As such, we are in the early stages of strengthening our fundraising coordination and long-term planning.

The immediate focus has been organizational: clarifying donor tracking, mapping grant timelines and matching requirements, and establishing a more consistent rhythm of cultivation and communication. The deeper work of refining strategy and broadening support will unfold throughout 2026.

This effort is not simply about increasing revenue. It is about cultivating a culture of shared responsibility across dioceses, parishes, and individual donors for the health of clergy and clergy families. This means increasing awareness and total number of donors, alongside increasing the total amount that comes in through gifts. The long-term stability of these initiatives will depend on that broader partnership. The present year will be critical in shaping that direction.

### Thriving in Ministry

Interest in Thriving in Ministry remains strong across our dioceses and in other Orthodox jurisdictions. Thriving in Ministry currently supports 32 active peer groups serving clergy and clergy wives across dioceses and jurisdictions. Several of these groups have now been meeting for more than five years, and many others are entering their third and fourth years of sustained participation.

The current discernment concerns how to bring long-standing groups to healthy graduation or self-sustainment, thereby creating space for new groups without overextending our program quality and capacity. In some cases, relationships have matured to the point where the group may continue organically, without the same level of oversight or administrative support.

The goal is to maintain program quality while responsibly expanding access. Participant testimony continues to confirm the program's impact. One priest stated plainly, "Thriving in Ministry saved my life." Another described the experience as "doing priesthood together" rather than carrying it alone. Clergy wives similarly emphasize the importance of having a structured space where the realities of clergy family life are understood without explanation.

Beyond individual testimony, the longevity of these groups is itself a sign of health. These are not short-term interventions but enduring relationships marked by trust, confidentiality, and shared vocational reflection. Participants consistently report reduced isolation, deeper self-awareness, and greater steadiness in parish leadership.

As the grant cycle matures, the present work is one of stewardship: preserving what has proven fruitful, clarifying pathways for self-sustaining groups, and ensuring that new clergy and clergy wives have access to the same formative support.

### **Financial Health Initiative (FHI)**

The 2025 cohort of the Financial Health Initiative has now been formally evaluated through survey responses and in-depth participant interviews. The findings confirm that the program is effective and materially beneficial.

Participants reported more intentional and consistent budgeting habits, stronger and more collaborative conversations within their marriages about money, a noticeable reduction in financial stress, and greater confidence in speaking about stewardship and parish finances.

Several clergy described moving from simply hoping finances would work out each month to proactively planning and making deliberate choices. That shift has had a stabilizing effect within households and ministries alike.

Participants also noted that personal financial clarity strengthened their pastoral leadership, particularly in teaching and speaking about stewardship.

The \$5,000 debt-reduction incentive proved both practical and symbolic. It gave clergy families real momentum toward paying down debt or building savings, and it sent a clear message: the Church is paying attention and wants them to thrive. The evaluation confirms that this component significantly strengthened engagement.

The evaluation identified areas for refinement, including stronger Orthodox theological framing, attention to varying levels of financial literacy, and clergy-informed coaching. These recommendations represent healthy development rather than weakness.

Taken together, the evaluation affirms the program's central premise: greater financial stability within clergy families strengthens pastoral confidence and leadership.

Applications for the next cohort of 30 families will open on May 1, 2026.

### **Synaxis**

The quarterly Synaxis gatherings continue to provide an Orthodox Church in America-wide peer-learning space exclusively for clergy of the Orthodox Church in America. That shared ecclesial identity matters. Participants engage one another not only as priests and deacons, but as fellow laborers within the Orthodox Church in America, strengthening bonds across dioceses and cultivating a deeper sense of common purpose and connection within the clergy ranks.

Participation remains steady, with clergy joining from a wide range of parish contexts—urban and rural, large and small, newly ordained and decades into ministry. The diversity of experience represented in

each gathering has proven to be one of its greatest strengths. Hearing how others navigate parish leadership, family life, and pastoral pressures broadens perspective and reduces the sense of isolation that can quietly accompany ministry.

Synaxis offers a legitimate peer-learning experience without the sustained commitment required of Thriving in Ministry groups. Its low-commitment format makes it accessible to clergy who may not yet be ready or able to enter a multi-year peer group. In that sense, it provides an entry point into deeper peer engagement while standing on its own as a space for meaningful connection.

One priest summarized his experience by saying Synaxis provides “perspective, connection, and the reminder that I am honored to stand among fellow priests.”

A deacon reflected that it offered “a sustained sense of belonging within the diaconate beyond my own parish.”

In January, the Office successfully introduced Clergy Conversations, a pilot initiative developed organically from Synaxis. The inaugural gathering, hosted in collaboration with Orthodox Christians for Life, brought priests and deacons from across the Orthodox Church in America together for shared and collaborative pastoral conversation centered on a focused theme. The format allowed for structured engagement in a unified setting, rather than the extended breakout groups that characterize Synaxis. The strong response to this initial offering has encouraged plans for additional Clergy Conversations in the coming year.

Its continued consistency has made Synaxis a dependable and accessible pillar of the Office’s work, strengthening connection across the Church without imposing significant additional demands on already full clergy schedules.

### **Clergy Wives Ministry**

Following a leadership transition in November 2025, the Clergy Wives Ministry has entered a new season marked by stronger integration within the Office of Pastoral Life and clearer coordination across the Office’s suite of clergy-care programs.

One important result of this transition has been a more natural integration of the Clergy Wives Ministry within the overall work of the Office of Pastoral Life. The ministry now moves forward as part of a unified effort to support clergy and their families. Clergy wives carry a unique and often unseen share of parish life, and it is both prudent and pastorally necessary that their well-being be supported intentionally.

A tangible sign of this renewed direction was the pilot **Matushki Meet-Up** held in February 2026 at the Diocese of the South Pastoral Conference. Organized through the Office of Pastoral Life’s Clergy Wives Ministry and underwritten by the Diocese of the South, the gathering brought together twenty priest wives, deacon wives, and prospective seminarian wives for three days of relaxation, fellowship, reflection, and shared encouragement.

The Meet-Up blended informal connection with guided conversation and participation in portions of the broader Pastoral Conference, allowing clergy couples to share in the rhythm of the week while also honoring the unique needs of clergy wives. Participants spoke of authentic connection, mutual encouragement, and the opportunity simply to be together as sisters in a shared vocation. Surveys revealed the most treasured element of the Meet-Up was the dinner and directed discussion shared with

diocesan bishops. The overwhelmingly positive response from clergy wives and diocesan leadership alike has encouraged exploration of similar offerings in other regions and dioceses.

***One Book. One Sisterhood.*** was launched in January to build unity among clergy wives. Inspired by *One Book, One City*, this program promises to build a sense of community as clergy wives not only read the same book, but will engage in activities around the themes it presents throughout the year. A major revamp of the website is in the works and will be revealed in stages. The new website will feature clergy wife spotlights, shared resources, FAQ's, a blog, and contact lists.

The Clergy Wives Ministry continues to focus on creating intentional spaces where clergy wives can build health, sisterhood, and shared strength. This work reflects a wider pastoral conviction: when clergy couples are supported and strengthened, the stability and vitality of parish life are strengthened as well.

### **OCA-wide In-Person Retreats**

Preparations are underway for two OCA-wide in-person gatherings in 2026: a Clergy Wives Retreat in July and a Clergy Retreat in the early fall.

While virtual programming continues to serve an important role, in-person gatherings offer something that cannot be replicated online. Extended time together allows for deeper conversation, shared prayer, and relational strengthening. These retreats are not simply events, but dedicated time set apart for renewal, reflection, and strengthening in ministry.

Both retreats will create space to reflect on pastoral identity, shared challenges, and the opportunities facing the Church in this current season of growth. They also allow clergy and clergy wives to step away from daily parish demands and return with renewed clarity and steadiness.

Broad participation will depend upon parish encouragement and practical support. In addition to the reasonable travel and registration costs borne by parishes in supporting their clergy and clergy wives, these retreats also require shared financial support from the Central Administration. The health of clergy and clergy families is sustained not only by programs, but by the Church's willingness to invest in their renewal.

### **Conclusion**

Across its initiatives, the Office of Pastoral Life continues to see steady fruit. Long-standing Thriving in Ministry groups demonstrate durability. The Financial Health Initiative has now been externally evaluated and shown to produce measurable personal and pastoral benefits. Synaxis and Clergy Conversations strengthen OCA-wide connection. The Clergy Wives Ministry is moving forward with renewed clarity, and OCA-wide retreats are preparing to gather clergy and clergy wives for needed renewal.

The work ahead requires careful stewardship. These initiatives must remain financially sustainable, pastorally grounded, and proportionate to our capacity. Strengthening long-term fundraising capacity is essential, particularly as grant cycles mature and programs move toward durable integration within the life of the Church. Growth is encouraging, but it must be matched with responsibility and shared commitment across the Orthodox Church in America.

When clergy and their families are strengthened, parishes are strengthened. That conviction continues to guide the work of the Office.

Respectfully submitted,

Archpriest Nicholas J. Solak  
Director, Office of Pastoral Life