MEETING OF THE DIOCESAN COUNCIL OF THE DIOCESE OF THE MIDWEST

Archangel Michael Church, Burbank, Illinois • 18 June 2021

I. OPENING.

The meeting opened with at 10:11am CST with the singing of the Troparion of the Ascension. Archbishop PAUL officially called the meeting to order and asked for additions to the agenda.

II. ATTENDANCE.

Present: His Eminence, Archbishop Paul; Archpriest Paul Jannakos, Chancellor; Archpriest Herman Kincaid, Secretary; Robert Koncel, Treasurer.

Council Members: Archpriests Andrew Bartek, Elijah Mueller, Benjamin Tucci (Zoom); Priest Jacob Van Sickle; Protodeacon George Potym; Ellyn Gillette, Robert Graban, Simeon Morbey (Zoom), Carrie Sabourin, Mary Ann Bobulsky.

Deans: Archpriests Alexander Kuchta, Timothy Sawchak, Dusan Koprivica, Andrew Clements, Paul Wesche. Priest Alexander Koranda, Director of Communications; Philip Sokolov, Secretary to the Archbishop.

Absent: Archpriests Joel Weir, James Dank, Kenneth Herman.

III. SCRIPTURE READINGS.

Acts 27:1-44, read by Carrie Sabourin. John 17:18-26, read by Fr. Andrew Bartek. Discussion followed.

IV. ACCEPTANCE OF MINUTES OF PREVIOUS MEETING.

One correction: \$121,000 for Buckner Cemetery should read \$100,000. Motion to accept December, 2020 minutes as amended: Fr. Andrew Bartek, seconded by Fr. Jacob Van Sickle. Motion passed.

V. OPENING STATEMENT BY ARCHBISHOP PAUL.

- 1. I have been active visiting parishes since Summer of 2020, wearing masks and socially distancing. Good things are happening in parish life. It is nice to now experience normalcy. As far as I am concerned, other than serving food at Fellowship, everything is open. There are no restrictions any more coming from me with regard to kissing icons or the chalice or number of people in the church. I would dread having to go back to limiting the number of people in church. I want the practice of multiple spoons and sanitizing spoons to be stopped, if not immediately then by the end of July. It will not become permanent. I also am not in favor of any practice which will separate vaccinated from non-vaccinated.
- 2. We have a women's monastery now, regarding which I am very optimistic. We have people visiting Mother Alexandra now, and one who may become a novice. Visit Mother's website and purchase candles to support her.
- 3. I am unhappy with the ministries in the Diocese. Things start well but trickle out. We have good people but how do we maintain momentum? We have budgeted to hire a Development Director, but we are not ready to hire one because we have no "product."
- 4. We have extra money and I am concerned about it just sitting there. I want to support missions and mission priests more.
- 5. I wanted to see this Diocesan Council be not just a business council but one where all the members are involved in ministries which benefit our parishes.
- 6. The other option is to reduce the percentage assessment. His Eminence asked Finance Committee to investigate an appropriate percentage.

- 7. Maybe we move towards a program or support a program which provides loans to parishes.
- 8. I am pleased about starting some missions, starting with one in Aurora, IL.
- 9. Fr. Van Sickle: A few years ago we were concerned about having enough priests for our parishes. Abp. Paul: It's an issue, but so far, God has provided.

VI. CHANCELLOR'S REPORT.

- 1. Grateful to Fr. John Zdinak for assistance in transition and Archbishop's patience. Working with clergy who are having difficulties.
- 2. Chancery meetings are bimonthly. Reporting on administrative tasks and trying to stay ahead of projects.
- 3. Working on clergy handbook laying out Archbishop's expectations, liturgical life, and other important items.
- 4. Following up on Clergy and Laity task forces since workshop with Bill Marianes. Clergy is still in formation, while the Laity is moving ahead with their work.
- 5. Carrie Sabourin and Ellyn Gillette reviewed strategic plan draft given to all diocesan council members. It is a working document, open to suggestions and further revisions. Task force meets every three weeks. Members continue to research methods and literature suggested by Bill Marianes. See strategic plan document for reference.

VII. TREASURER'S REPORT

- 1. In reference to written report. We are doing well. Parishes are submitting their tithes on time. The additional income was to fund specific causes Niangua Monastery and Buckner Cemetery.
- 2. Reviewed funds status. Mission projects fund money to Greater Horizon. Monastery reserve fund two \$5,000 checks recently issued from the fund.
- 3. Diocesan mission parish development fund \$529,376.33 figure. Transfer of excess to mission projects fund. Discussion followed about best manner to utilize all mission related funds going forward (~\$750,000).
- 4. Questions: Kuchta about mission fund and bequests to diocese. Graban suggestion to place funds in better interest bearing allocations. Mueller suggested system to distribute money, not ad hoc. Sawchak highlighted positive discussion within diocese about possibilities for growth and other ideas. OCCIF discussion (Morbey, Van Sickle, Graban).
- 5. PPP Loan Update. Applied for forgiveness, and received approval less \$2,634. Apply \$41,000 from PPP and budgeted amounts from 2020 and 2021 to pay off \$250,000 property improvement loan balance completely.
- 6. Made transition to Quickbooks online allowing full backup of data.
- 7. Bookkeeper position has been filled by Angeline Kladis. Her duties will include paying bills and updating Quickbooks. Motion from Finance Committee: Approve the hiring of Angeline Kladis as the Diocesan Bookkeeper at an hourly rate of \$21.50/hour. As Bookkeeper, she will receive a 1099 at the end of the year. PASSED.
- 8. Pursuing quotes for projects around chancery weed control, lawns, gutters, concrete work, driveway replacement, fencing, lighting, security system.
- 9. Auditors will arrive around August for a two year audit. Documents are being assembled and prepared for this audit.
- 10. For 2022 budget, there is a possible increase of seminarian scholarships, mission grants, and the formulation of a parish loan program.

11. Development director position task force has defined the parameters. Moved by Archbishop PAUL, seconded by Fr. Jacob Van Sickle to dissolve task force. PASSED.

Lunch break at 12:00pm. During the lunch, council members were offered tours of the chancery offices. Reconvened at 1:00pm.

VIII. METROPOLITAN COUNCIL REPRESENTATIVES' REPORT.

See written report.

IX. VOCATIONS.

See written report. Approximately 40 students.

X. OLD BUSINESS.

None

XI. DEANERY REPORTS.

- 1. Chicago. Fr. Alexander Kuchta reporting. See written report.
- 2. **Cleveland.** Fr. Andrew Clements reporting. See written report. Fr. Peter Pawlack fell asleep in the Lord on 4/19/21. Memory eternal!
- 3. **Indianapolis.** Written report was read by Fr. Herman Kincaid.
- 4. **Kansas City.** Fr. Timothy Sawchak reporting. Saint Louis, MO: Fr. Matthew McDonald was assigned on 6/1 to. He is also director of FOCUS in Saint Louis. Father Christopher Phillips retired the same day. Overland Park, MO: On 4/1, Priest Justin Mathews was received back into OCA from Serbian Church and attached here.Lincoln, NE: Pdn. Edwin Aasen 5/23 fell asleep. Archpriest James Dank had a difficult time throughout the pandemic and will be taking a month vacation and is suffering from ill health. Joplin, MO: Purchased a new building. They had been meeting in Fr. Michael Kuzara's home in his garage. Kansas City Youth Camp will be only 3-day day camp hosted by local Serbian church in Kansas City
- 5. **Michigan.** Fr. Dusan Koprovica reporting. See written report.
- 6. **Minneapolis.** Fr. Paul Wesche reporting. See written report.

XII. NEW BUSINESS.

- 1. Archbishop PAUL would like the Finance Committee to investigate reducing the assessment percentage and report back at the next Council meeting.
- 2. In an effort to help fund parish projects, the Diocese will reach out to OCCIF Orthodox Church Capital Improvement Fund. The Diocese is not currently setup to finance such projects directly.
- 3. 2022 will be the 100th anniversary of the Diocese of the Midwest. Since the 50th anniversary of the autocephaly of the OCA was cut short by the pandemic, perhaps that same energy may be applied to this diocesan celebration.

XIII. NEXT MEETING.

To be held prior to the 60th Diocesan Assembly, on Monday, October 11, 2021. Also, the winter Diocesan Council meeting will be held on December 2 & 3 at St. Peter & St. Paul in Burr Ridge.

ADJOURNMENT AND PRAYER.

There being no further business, the meeting was adjourned upon motion by Fr. Elijah, seconded by Carrie Sabourin, at 2:25pm CST. Philip intoned "It is truly meet".

Respectfully submitted, Mr. Philip Sokolov & Archpriest Herman Kincaid

		TOTAL	
	ACTUAL	BUDGET	OVER BUDGET
Income			
Assessment Income	1,101,490.28	1,101,059.00	431.28
Convocation Income		12,000.00	-12,000.00
CTS Reimbursement	41.00	0.00	41.00
Diocesan Assembly Income	4,529.18	10,000.00	-5,470.82
OCA 2014 \$13 Escrow	419.70		419.70
Other Contributions	4,273.97	2,000.00	2,273.97
Outreach Income			
Late Vocations	15,375.00	12,000.00	3,375.00
Total Outreach Income	15,375.00	12,000.00	3,375.00
Restricted Income - Monastery	100,000.00		100,000.00
Special Contributions	200,000.00		200,000.00
Temp Restricted Income			
Mother Maria Paris Ministry	650.00	10,000.00	-9,350.00
Scholarships			
Support our Seminarians Appeal	7,697.00	12,000.00	-4,303.00
Total Scholarships	7,697.00	12,000.00	-4,303.00
Total Temp Restricted Income	8,347.00	22,000.00	-13,653.00
Unapplied Cash Payment Income	-655.22		-655.22
Total Income	\$1,433,820.91	\$1,159,059.00	\$274,761.91
GROSS PROFIT	\$1,433,820.91	\$1,159,059.00	\$274,761.91
Expenses			
Bank Service Charges	0.00		0.00
Clergy and Parish Resource Exp			
Hospitality	2,252.23	6,000.00	-3,747.77
Liturgical Supplies	140.00	200.00	-60.00
Total Clergy and Parish Resource Exp	2,392.23	6,200.00	-3,807.77
Communications			
Advertising		150.00	-150.00
Printing & Reproduction		100.00	-100.00
Total Communications		250.00	-250.00
Diocesan Assembly Expense		0.00	0.00
Diocesan Assembly		10,000.00	-10,000.00
Total Diocesan Assembly Expense		10,000.00	-10,000.00
Family/Youth Ministry		1,200.00	-1,200.00
Hardship Gifts	75,000.00	.,	75,000.00
Health Insurance	· -,		. 2,2 2 3 0 0
Bishop	4,864.40	4,251.00	613.40
Secretariat	13,728.00	13,722.00	6.00
Total Health Insurance	18,592.40	17,973.00	619.40
Insurance	•	•	

		TOTAL	
	ACTUAL	BUDGET	OVER BUDGET
Auto	2,071.04	1,900.00	171.04
Liabiility	1,588.08	2,100.00	-511.92
Life		0.00	0.00
Diocesan Keyperson		3,108.00	-3,108.00
Total Life		3,108.00	-3,108.00
Property	28,518.88	1,500.00	27,018.88
Total Insurance	32,178.00	8,608.00	23,570.00
Miscellaneous		500.00	-500.00
OCA Expenses			
OCA Tithe	460,624.61	462,444.78	-1,820.17
Total OCA Expenses	460,624.61	462,444.78	-1,820.17
Office Expense			
Automobile Expense	234.04	7,000.00	-6,765.96
Background Checks	322.75	10,500.00	-10,177.25
Bank Service Charges	7.53	600.00	-592.47
Debts Forgiven	4,457.80	0.00	4,457.80
Dues & Subscriptions	1,402.16	1,200.00	202.16
Internet Service Provider	2,003.26	3,000.00	-996.74
Library & Periodicals		700.00	-700.00
Office Supplies	4,061.33	3,000.00	1,061.33
Postage	676.66	1,000.00	-323.34
Psychological Evaluations	1,150.00	5,000.00	-3,850.00
Telephone	5,758.55	8,000.00	-2,241.45
Total Office Expense	20,074.08	40,000.00	-19,925.92
Payroll Expenses		19.25	-19.25
Taxes		1,900.65	-1,900.65
Workers' Comp	1,555.00	2,360.00	-805.00
Total Payroll Expenses	1,555.00	4,279.90	-2,724.90
Professional Fees		0.00	0.00
Accounting	6,480.00	6,500.00	-20.00
Counseling (deleted)	1,000.00		1,000.00
External Audit		2,000.00	-2,000.00
Family Website Support		1,200.00	-1,200.00
Investment Fund Management Fees	4,291.87	2,600.00	1,691.87
Legal		1,200.00	-1,200.00
Payroll Preparation	-57.00	750.00	-807.00
Website Support	7,032.17	8,420.00	-1,387.83
Total Professional Fees	18,747.04	22,670.00	-3,922.96
Program Expense			
Alaska-Mexico Appeal	2,000.00		2,000.00
Candles		1,500.00	-1,500.00
Charity		1,500.00	-1,500.00

		TOTAL	
	ACTUAL	BUDGET	OVER BUDGET
Convocations	1,750.00	12,000.00	-10,250.00
Donation to Episcopal Assembly	2,000.00	1,500.00	500.00
Late Vocations	7,200.00	12,000.00	-4,800.00
Mission Development	5,000.04	5,000.00	0.04
Mission Grants	30,800.00	46,800.00	-16,000.00
Monastery Ministry	5,000.00		5,000.00
Mother Maria of Paris Ministry	31,200.00	10,000.00	21,200.00
Seminarian Scholarships			
Budgeted Portion	19,999.98	20,000.00	-0.02
Fundraisers Portion	13,689.55	12,000.00	1,689.55
Scholarships- Other		2,000.00	-2,000.00
Total Seminarian Scholarships	33,689.53	34,000.00	-310.47
Total Program Expense	118,639.57	124,300.00	-5,660.43
Rectory Allowance	10,000.00	12,000.00	-2,000.00
Reimbursements		0.00	0.00
Repairs and Maintenance			
Burbank Rectory Repairs	702.96	30,000.00	-29,297.04
Labor	4,361.49	3,600.00	761.49
Maintenance	5,889.00		5,889.00
Maintenance Reserve		5,000.00	-5,000.00
Supplies	680.10	1,500.00	-819.90
Total Repairs and Maintenance	11,633.55	40,100.00	-28,466.45
Salaries & Wages			
Bishop		0.00	0.00
Discretionary Fund	179.00		179.00
Life Insurance		3,108.00	-3,108.00
Pension - DMW	13,184.42	7,902.79	5,281.63
Pension - EE Reimburse		2,928.54	-2,928.54
Salary	87,397.81	74,784.88	12,612.93
Social Security	6,685.93	7,557.04	-871.11
Total Bishop	107,447.16	96,281.25	11,165.91
Bishop's Keleinik		0.00	0.00
Pension - DMW	2,411.91	1,862.64	549.27
Pension - EE Reimburse		1,947.84	-1,947.84
Salary	27,190.75	24,348.00	2,842.75
Social Security	2,080.10	918.00	1,162.10
Total Bishop's Keleinik	31,682.76	29,076.48	2,606.28
Chancellor			
Pension - DMW	2,687.88	2,243.35	444.53
Pension - EE Reimburse		829.26	-829.26
Salary	32,186.76	28,041.91	4,144.85
Social Security	2,462.29	2,145.21	317.08

		TOTAL	
	ACTUAL	BUDGET	OVER BUDGE
Total Chancellor	37,336.93	33,259.73	4,077.20
Property Manager		0.00	0.00
Pension - DMW	2,553.05	1,920.00	633.05
Pension - EE Reimburse		0.00	0.00
Salary	12,858.72	11,112.00	1,746.72
Total Property Manager	15,411.77	13,032.00	2,379.77
Secretariat			
Pension - DMW	3,736.46	3,585.11	151.35
Pension - EE Reimburse		0.00	0.00
Salary	52,329.60	44,813.82	7,515.78
Social Security	4,003.22	3,428.26	574.96
Total Secretariat	60,069.28	51,827.19	8,242.09
Total Salaries & Wages	251,947.90	223,476.65	28,471.25
Service Contracts	4,032.29	4,500.00	-467.71
Special Projects Fund		40,000.00	-40,000.00
Stipends			
Communications Director			
Stipend	3,300.00	3,600.00	-300.00
Total Communications Director	3,300.00	3,600.00	-300.00
Deans			
Chicago	3,000.00		3,000.00
Stipend	3,600.00	3,600.00	0.00
Total Chicago	6,600.00	3,600.00	3,000.00
Cleveland			
Stipend	3,600.00	3,600.00	0.00
Total Cleveland	3,600.00	3,600.00	0.00
Indianapolis			
Stipend	3,600.00	3,600.00	0.00
Total Indianapolis	3,600.00	3,600.00	0.00
Kansas City			
Stipend	3,600.00	3,600.00	0.00
Total Kansas City	3,600.00	3,600.00	0.00
Michigan			
Stipend	3,600.00	3,600.00	0.00
Total Michigan	3,600.00	3,600.00	0.00
Minneapolis	•	•	
Stipend	3,600.00	3,600.00	0.00
Total Minneapolis	3,600.00	3,600.00	0.00
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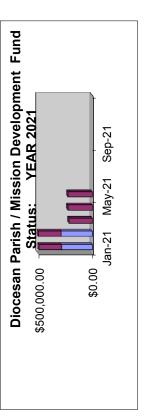
		TOTAL	
	ACTUAL	BUDGET	OVER BUDGET
Stipend	14,400.00	12,000.00	2,400.00
Total Late Vocations Coordinator	14,400.00	12,000.00	2,400.00
Treasurer			
Stipend	3,600.00	1,800.00	1,800.00
Total Treasurer	3,600.00	1,800.00	1,800.00
Youth Coordinator			
Stipend	2,400.00		2,400.00
Total Youth Coordinator	2,400.00		2,400.00
Total Stipends	48,300.00	39,000.00	9,300.00
SUSPENSE	0.00	0.00	0.00
Travel			0.00
Auditors		2,500.00	-2,500.00
Bishop	8,051.16	13,500.00	-5,448.84
Bishop's Keleinik	2,124.92	5,000.00	-2,875.08
Chancellor	239.96	5,000.00	-4,760.04
Deanery	29.90	0.00	29.90
Deans	104.87	1,200.00	-1,095.13
Diocesan/Bishop's Council	4,941.60	24,000.00	-19,058.40
Late Vocations		500.00	-500.00
Metropolitan Council	85.09	1,000.00	-914.91
Secretariat	571.68	800.00	-228.32
Total Travel	16,149.18	53,500.00	-37,350.82
Unapplied Cash Bill Payment Expense	0.00		0.00
Utilities			
Electric	2,942.68	2,000.00	942.68
Garbage	156.12	480.00	-323.88
Gas	4,641.57	2,000.00	2,641.57
Water & Sewer	762.83	1,000.00	-237.17
Total Utilities	8,503.20	5,480.00	3,023.20
Total Expenses	\$1,098,369.05	\$1,116,482.33	\$ -18,113.28
NET OPERATING INCOME	\$335,451.86	\$42,576.67	\$292,875.19
Other Income			
Gain (Loss) on Sale of Assets		0.00	0.00
Long-Term	32,091.59	0.00	32,091.59
Short-Term	-154.21	0.00	-154.21
Total Gain (Loss) on Sale of Assets	31,937.38	0.00	31,937.38
Gain(Loss) on Trnsfer of Assets		0.00	0.00
Interest Income	39.31	0.00	39.31
Investment Income			
Smith Barney	18,411.56	0.00	18,411.56
Total Investment Income	18,411.56	0.00	18,411.56

		TOTAL	
	ACTUAL	BUDGET	OVER BUDGET
Total Other Income	\$50,388.25	\$0.00	\$50,388.25
Other Expenses			
Bishop's Discretionary Fund		1,200.00	-1,200.00
Depreciation Expense			
Depreciation- Buildings	251.69		251.69
Depreciation- Computers	2,803.32		2,803.32
Depreciation- Equipment	1,118.28		1,118.28
Depreciation- Furniture	889.85		889.85
Depreciation- LHI	2,147.40		2,147.40
Depreciation- Vehicles	3,750.50		3,750.50
Total Depreciation Expense	10,961.04		10,961.04
Fines & Penalties	347.07	0.00	347.07
Interest Expense	12,795.10	12,442.75	352.35
Relocation Expense	-134.24		-134.24
Taxes and Licenses	345.03	150.00	195.03
Total Other Expenses	\$24,314.00	\$13,792.75	\$10,521.25
NET OTHER INCOME	\$26,074.25	\$ -13,792.75	\$39,867.00
NET INCOME	\$361,526.11	\$28,783.92	\$332,742.19

DIOCESAN MISSION / PARISH DEVELOPMENT FUND STATUS FOR 2021

	Morgan Stan	ey/Smith Barney	ly Summ
Ō	\$76,901.68	\$36,314.89	10tal of Both Funds \$113,216.57
	\$55,941.71	\$35,833.37	\$91,775.08
	\$48,666.52	\$39,127.56	\$87,794.08
	\$29,910.32	\$35,685.27	\$65,595.59
	\$40,302.91	\$46,454.48	\$86,757.39
	\$65,577.59	\$94,944.45	\$160,522.04
	\$73,368.45	\$106,883.52	\$180,251.97
	\$80,468.45	\$138,634.24	\$219,102.69
	\$122,947.79	\$170,513.99	\$293,461.78
	\$80,842.09	\$110,129.02	\$190,971.11
	\$108,519.41	\$147,874.94	\$256,394.35
	\$129,492.41	\$166,087.12	\$295,579.53
	\$129,973.68	\$159,986.27	\$289,959.95
	\$150,262.53	\$184,556.53	\$334,819.06
	\$194,762.29	\$218,837.99	\$413,600.28
	\$202,298.31	\$232,521.19	\$434,819.50
	\$203,932.30	\$224,293.69	\$428,225.99
	\$220,307.63	\$241,771.14	\$462,078.77
	\$224,772.14	\$280,620.39	\$505,392.53
	\$205,054.17	\$280,654.37	\$485,708.54
	\$235,229.27	\$268,097.59	\$503,326.86
	\$246,237.53	\$284,508.56	\$530,746.09
	Morgan Stanle	Morgan Stanley/Smith Barney:	Monthly Summary
₽	Portfolio Fund 8772	Income Fund 8774	Total of Both Funds
	\$208,105.71	\$278,379.42	\$486,485.13
	\$212,448.39	\$285,576.16	\$498,024.55
	\$214,520.57	\$287,046.61	\$501,567.18
	\$225,892.17		
	\$225,669.00		

Transfer of Funds to Mission Projects Fund: \$25,997.54
11/28/17:\$21,672.45 Transferred from Fund 8772 to new Morgan Stanley Fund: Mission Projects Fund No. 1477
11/28/17: \$4,325.06 Transferred from Fund 8774 to new Morgan Stanley Fund: Mission Projects Fund No. 1477
Transfer of Funds to Mission Projects Fund: \$15,561.05
12/29/2017: \$8,839.05 Transferred from Fund 8772 to new Morgan
Stanley Fund: Mission Projects Fund No. 1477
1/3/18: \$6,722.00 Transferred from Fund 8774 to new Morgan Stanley
TOTAL TRANSFER OF FUNDS TO MISSION PROJECTS FUND: \$23,000
8/23/2019: \$4,700 Transferred from Fund 8772 to new Morgan
Stanley Fund: Mission Projects Fund No. 1477
8/23/19: \$18,300 Transferred from Fund 8774 to new Morgan Stanley
Fund: Mission Projects Fund No. 1477.
TOTAL TRANSFER OF FUNDS TO MISSION PROJECTS FUND: \$40,000
12/20/19: \$20,000 Transferred from Fund 8772 to new Morgan
Stanley Fund: Mission Projects Fund No. 1477
12/20/19: \$20,000 Transferred from Fund 8774 to new Morgan Stanley
Fund: Mission Projects Fund No. 1477.
TOTAL TRANSFER OF FUNDS TO MISSION PROJECTS FUND: \$37,000
12/02/20: \$37,000 Transferred from Fund 8774 to Morgan Stanley Fund:
TOTAL TRANSFER OF FUNDS TO MISSION PROJECTS FUND: \$46,500
1/25/21: \$39,500 Transferred from Fund 8772 to Morgan Stanley Fund:
Mission Projects Fund No. 1477.
1/25/21: \$7,000 Transferred from Fund 8774 to Morgan Stanley Fund
Mission Projects Fund No. 1477



MORGAN STANLEY INVESTMENTS 2021

9341 9340 1477 8841 6835 5820 Bishop Mam 5800 Gen. 5403 Reserve Reserve Fund Openet Fund Projected Fund Openet Fund Projected Fund Openet Fu									2021 Mc	rgan	2021 Morgan Stanley Investment Accounts	tmer	nt Accounts							
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CC:3	Gain/Loss	\$	1.59	\$ 0.1	-	\$ 8.74	s	0.45	°	0.62	\$ 904.51	s	(667.19)	ઝ	2.90	\$ 3.29	\$	0.72	s	251.80

5/11/17: (\$100,003.40) withdrawn from this Morgan Stanely Account for the Minneapolis Deanery and closed out at the direction of Bishop Paul and the Mpis Dean. Funds were transferred into the Bank of America Account on 5/12/17 for Distribution to the Minneapolis Deanery. The Diocese was only holding these funds in escrow for the Minneapolis Deanery until they decided what they wanted 3/7/17: (\$53,127.02 amount) \$20,000 withdrawn from the OCA Reserve Fund and Deposited into the Bank of America Checking MM Account to cover expenses to do with the funds.

1/28/2017: \$21,672.45 transferred from the Diocesan parish / Mission Development Fund 128772 into New Mission Projects Fund (\$25,997.54 Total) 1/28/2017: \$ 4,325.06 transferred from the Diocesan parish / Mission Development Fund 128774 into New Mission Projects Fund (\$25,997.54 Total) 2/29/2017: \$8,839.05 transferred from the Diocesan parish / Mission Development Fund 128772 into Mission Projects Fund (\$15,561.05 Total)

7/18/17: The remaining Balance of \$0.27 in Mn Deanery Fund was transferred to Acc. 5403 Gen Operationing Fund for final Closeout

(3/2018: \$6,722.00 transferred from the Diocesan parish / Mission Development Fund 128774 into Mission Projects Fund (\$15,561.05 Total)

3/2018: \$17,469.06 transferred out of Auto Reserve Fund to BOA to pay for new Ford Focus for Bishop Paul /4/2018: \$21,000 transferred out of OCA Reserve Fund to BOA to pay to cover checking account shortfall

2/17/2018. \$5,000 transferred out of Bank of America Account and deposited into Auto Reserve Fund per 2018 Budget

723/2019: \$ 4,700 transferred from the Diocesan Mission / Parish Endowment Portfolio Fund 128772 into New Mission Projects Fund (\$23,00 Total) (\$23,2010) transferred from the Diocesan Mission / Parish Endowment Income Fund 128774 into New Mission Projects Fund (\$23,000 Total)

2/20/2019: \$20,000 transferred from the Diocesan Mission / Parish Endowment Portfolio Fund 128772 into New Mission Projects Fund (\$40,000 Total)

2/20/2019: \$20,000 transferred from the Diocesan Mission / Parish Endowment Income Fund 128774 into New Mission Projects Fund (\$40,000 Total) 1/3/2020: \$5,000 transferred out of Bank of America Account and deposited into Auto Reserve Fund per 2019 Budget

MORGAN STANLEY INVESTMENTS 2021

1/9/2020: \$5,000 transferred out of Bank of America Account and deposited into Maintenance Reserve Fund per 2019 Budget

5/18/2020: \$43,664 of the Payroll Protection Fund Loan received from the Bank of America (CARES Act) from the BOA checking account was withdrawn from the checking account and deposited in the General Operating Reserve Fund to hold if (until) the funds are required to pay salaries per terms of the loan

Projects Reserve Fund to be held until needed for distribution per the terms of the gift donor. 5/18/2020: \$150,000 (total amount: \$50K in 2019 and \$100K in 2020) from the gifts received from Greater Horizons was withdrawn from the BOA checking account and deposited in the Mission

5/21/2020: \$50,000 from the gift received of the \$100K amount from Greater Horizons was withdrawn from the Mission Projects Reserve Fund and deposited in the Bank of America Checking account for disbursment to clergy/individuals experiencing financial hardship per the terms of the gift donor.

account and then transferred to the MMCM checking account on 6/12/2020 per the motion of the Diocesan Council on 6/2/2020 to be used per the terms of the gift donor 6/11/2020: \$25,000 from the gift received of the the \$50k amount from Greater Horizons was withdrawn from the Mission Projects Reserve Fund and deposited into the Bank of America Main Checking

8/5/2020: Diocesan Council approved the closing of the OCA Reserve Fund and transferring the remaining \$32,193.92 balance to the General Operating Reserve Fund. As a result, the General Operating Reserve Fund was increased by \$32,193.92 to \$88,119.82. The OCA Reserve Fund was renamed the Archbishop Life Insurance Fund

of the other 50% of this amount. Archbishop's Life Insurance Policy from the 2018, 2019 and 2020 approved budgets. 50% of this amount goes to the named beneficiary of the Archbishop and Diocese of the Midwest is the beneficiary 16/2020: The Finance Committee agreed to deposit \$13,798.10 into the Archbishop Life Insurance Fund (Formerly the OCA Reserve Fund). The \$13,798.10 consists of the budgeted amounts for the

for disbursment to clergy/individuals experiencing financial hardship per the terms of the gift donor. 128/2020: \$22,000 from the gift received of the \$100K amount from Greater Horizons was withdrawn from the Mission Projects Reserve Fund and deposited in the Bank of America Checking account

for disbursment to the Diocese of Mexico for clergy experiencing financial hardship per the terms of the gift donor. 10/13/2020: \$2,000 from the gift received of the \$100K amount from Greater Horizons was withdrawn from the Mission Projects Reserve Fund and deposited in the Bank of America Checking account

for disbursment to two clergy experiencing financial hardship per the terms of the gift donor. 0/28/2020: \$5,000 from the gift received of the \$100K amount from Greater Horizons was withdrawn from the Mission Projects Reserve Fund and deposited in the Bank of America Checking account

2/16/2020: \$5,000 Transferred from the Bank of America Checking Account to the Maintenance Reserve Fund per the 2020 Budget \$37,000 transferred from the Diocesan Mission / Parish Endowment Portfolio Fund 8774 into New Mission Projects Fund

12/16/2020: \$5,000 Transferred from the Bank of America Checking Account to the Automobile Reserve Fund per the 2020 Budge

Browning Trust Fund that was dated 8/11/1988 which set up the funding for the Perpetual Care Fund for the Cemetery. 2/16/2020: \$100,000 Transferred from the Bank of America Checking Account to the Perpetual Care Fund for the Buckner Cemetery. This is the donation received from the Cecil & Elizabeth

Fund 8772 into the Mission Projects Fund 1477. Total transfer of \$46,500.00 125/2021: \$39,500 transferred from the Diocesan Mission/Parish Development Fund 8774 into Mission Projects Fund 1477 and \$7,000 transferred from the Diocesan Missions/Parish Development

of the \$150

Note: The New Monastery Fund was established for the remaining balance of the \$100,000 grant received to purchase the Monastery. The remaining balance of \$21,868.81 was deposited in the Auto Reserve Fund in December of 2020 and subsequently moved to New Monastery Fund in January of 2021. \$0.10 Interest earned. Total for 1/31/21 is \$21,868.92

6/17/2021 **Morgan Stanley Investment Account Balances**

\$1,175,855.83 -

A	s of 6/17/202112:22 AM ET Refresh market data				
	overview Available Funds (Cash+Loans)	Investment Details	Allocation	Projected Income	
	Assets			\$0.00 bala	nces
ii	Group/Account ▲	Total Assets(\$)	Available Cash(\$)	Today's Change	Actions
	Total	1,175,855.83	570,458.72	\$0.00 0.00%	
¥	Archbishop Ins Pol - 5841	13,799.19	13,799.13	\$0.00 0.00%	1
	Auto Reserve Fund - 5835	18,856.60	18,856.51	\$0.00 0.00%	:
	Bishop Job Mem Scholarship Fund - 5820	17,332.64	897.29	\$0.00 0.00%	1
	Gen Operating Reserve Fund - 5403	88,126.80	88,126.41	\$0.00 0.00%	1
	Legal Reserve Fund - 5800	66,505.67	2,795.18	\$0.00 0.00%	1
	Maintenance Reserve Fund - 9341	48,631.56	48,631.34	\$0.00 0.00%	I
	Minn Deanery Mission Funds - 5892	0.00	0.00	\$0.00 0.00%	:
	Mission Projects - 1477	266,036.80	266,035.65	\$0.00 0.00%	:
	New Monastery - 7463	21,869.73	21,869.63	\$0.00 0.00%	:
	Perpetual Care Fund - 7406	100,005.01	100,004.57	\$0.00 0.00%	:
M (SSION/PANISH	Portfolio Management - 8772	229,882.76	4,042.91	\$0.00 0.00%	529, 376.33
M (SSION/PANISH DEVELOPMENT FUNDS	REG - 8774	299,493.61	84.66	\$0.00 0.00%	:)
	Special Visit Reserve Fund - 9340	5,315.46	5,315.44	\$0.00 0.00%	i

Report of Diocesan Metropolitan Council Representatives

Since the last report, the Metropolitan Council met via five videoconferences (Zoom). This report will focus on items of particular interest to the Diocese and other potentially actionable items.

November 4, 2020: A balanced budget of \$1.8M for 2021 was approved, and a resolution to ask for PPP forgiveness (CARES Act) was passed. \$195,958.64 was ultimately forgiven, which was approximately \$1,200 more than was originally requested. For 2021, the proportional giving rate of our diocese is 40%, which goes down to 38% in 2022. Efforts to sell the Syosset Chancery and relocate the archives continue. The Legal Committee reported that *Romanian Orthodox Episcopate of America v. Duvlea and Holy Trinity Monastery* case was concluded in favor of the OCA's Romanian Episcopate. A separate case of *Romanian Orthodox Episcopate of America v. Gheorghe Carstea and Saint Nicholas Church* was in Oakland County Circuit Court awaiting scheduling. This focuses on issues of possession and control of a parish in Troy, Michigan, and is a functional companion case to the Duvlea case mentioned above.

Extraordinary Session November 19, 2020: Approval was given to postpone the All American Council to the week of July 18, 2022. Subsequently, it was agreed that it will remain in Baltimore, in the venue originally contracted. Two offers to buy the Syosset property were received at \$5 million and \$5.5 million. A motion was approved to authorize the MC Property Committee to negotiate a counteroffer, contingent on approval by the Metropolitan Council and Holy Synod. No deals were reached.

Spring Session, February 24, 2021: Following a report from the OCA Pension Board, the MC "reiterated its resolution adopted a year ago, requesting that the Holy Synod create a joint commission, composed of Holy Synod and Metropolitan Council members, to enforce compliance with the mandate of the OCA Statute and All-American Council decisions, that all eligible clergy are to be enrolled in the OCA Pension Plan." The Pension Board reported 14 additional clergy joined the plan since the last meeting, and about 85% of those eligible are enrolled.

Spring Session (Continued), March 3, 2021: OCA departments have been reorganized, with Archpriest Thomas Soroka, Project Manager of the Departments of the OCA highlighting the various completed, ongoing or pending projects and tasks. An adult catechism project is nearing completion. Spanish language missionary work and publications were also discussed.

Special Session, May 11, 2021: His Beatitude, Metropolitan Tikhon paid tribute to the recently departed Archpriest Antonio Perdomo for his work as a member of the MC and his Spanish language ministry. "*Memory eternal*" was sung for Fr. Antonio, as well as Metropolitan Theodosius and Protopresbyter Daniel Hubiak, who played large roles in the work of the Metropolitan Council. The MC endorsed Fr. Alessandro Margheritino for the position of OCA Secretary, in accordance with the OCA Statute, for confirmation by the Holy Synod. The property committee reported on the ongoing efforts to sell the Chancery (Westwood property), and the MC approved extending the realtor's contract through December 31, 2021.

In response to questions Metropolitan Tikhon has been receiving regarding the Pension Plan, His Beatitude asked treasurer Andrew Smith to form an ad hoc committee to assist in answering the questions. The committee of Fr. John Hopko, Andrew Smith, and Robert Popadic finished a report. In anticipation of this report being released to the Metropolitan Council, His Beatitude formed a smaller committee within the MC under the direction of Andrew Smith, to examine this report first, and then to present it to the Metropolitan Council at a future meeting. Members of this subcommittee are Andrew Smith, Archpriest Joseph Ciarciaglino, David Lane, Donna Dimitri, and Bob Graban. "The formation of this committee and its tasks are necessary preconditions to the work of the committee that will be formed as mandated by decisions of the Spring 2020 and 2021 sessions of the Metropolitan Council".

Respectfully submitted, Bob Graban Fr. Elijah Mueller June 15, 2021





for Renewal of Diakonia and Catechesis in the Midwest Diocese of the Midwest, Orthodox Church in America, 5037 W 83rd St, Burbank, IL 60459 Fr. Elijah Mueller, Ph.D., Director, 312-714-9775 elijahnmueller@sbcglobal.net

Midwest Diocesan Council, June 2021. Report

Cohorts: **Detroit**-started as part of diocesan zoom online course, for initial course; **Indianapolis**; (Dayton)—alternate Bulgarian OCA diocesan cohort; **Cleveland**— started as part of diocesan zoom online course—lack of local deanery faculty and buyin; Chicago—mid-cycle, still online; **Minneapolis/St.Paul**—no cohort; **KC deanery**—finishing cohort cycle.

Planning well underway for 8th Annual Summer Conference, 2nd year in Milwaukee: August 6-7. Featured speaker, TB A.

Approximately, over course of year: ~50 students over course of last year (OCA Midwest, OCA Bulgarian affiliated, Dayton based program), few more occasional students

Students, having completed work, were approved at last two Synod meetings for ordination: 3. Somewhere between 10-20 catechist certificates are soon to mail out to those who have completed and will help in the teaching ministry of the Church.

There are 2 students at present close to completing the curriculum cycle that have expressed interest in ordination. Many more at earlier stage in curriculum cycle.

The total cost of tuition per student for each course is now \$500.

Please let us know if there are other students or faculty. If you desire to start a local program, please contact Fr. Elijah Mueller, 312-714-9775, elijahnmueller@sbcglobal.net

Fr. Elijah Mueller

Chicago Dean's Report for Spring 2021 Meeting

Pastoral and other changes:

Archangel Michael Church in Burbank is seeking to sell their property and have remaining parishioners migrate to the St. John of Chicago Chapel. Additionally, it is thought that some Archangel Michael parishioners will attend Ss. Peter and Paul in Burr Ridge and St. Joseph in Wheaton.

- Fr. John Segvich is overseeing this transition with Chancellor Archpriest Paul Jannakos. Archbishop Paul has asked the parish to sell the rectory and present home of the Diocese of the Midwest to the Diocese for a token sum of money.
- Fr. Esteban Vasquez will serve alternating Sundays at St. Panteleimon and St. Michael in Burbank until the sale of the property and transition of parishioners to St. John. On the Sundays on which he does not celebrate Divine Liturgy at St. Panteleimon and Archangel Michael, Protodeacon Robert Northrup will celebrate a Typica and service Holy Communion.

Fr. Esteban will also be starting a PhD. program at Loyola University and doing Spanish Language ministries, podcasts, and translations at Ancient Faith.

After having completed a number of necessary tasks, including obtaining a lease for the property that they use, filing articles of incorporation and adoption of bylaws, Holy Theophany Chapel of Williams Bay, WI has been elevated to mission status as of April 1st.

Archbishop Paul has given a blessing to Fr. Elijah Mueller to initiate a meeting of the local SE Wisconsin OCA clergy to increase communication and connection between their ministries. Fr. Elijah "...felt it was important that we share what is going on in our communities and have a greater sense of participation in each other's work, difficulties, and successes. We hope to make a more coordinated effort to reach as many people as possible, together, renewing our sense that we work as a larger Church in evangelizing and ministering to our broader community. As we slowly emerge from this covid mess, if we plan right, perhaps we can experience a special movement of the Holy Spirit to bring us together in the one body and work of Christ, manifested clearly and unambiguously!"

Fr. John Baker has moved from Christ the Savior Parish in Chicago to St. Mark Parish in Rochester Hills, MI beginning his assignment there as of June 1.

Fr. Jonathan Lincoln has been assigned as acting rector of Christ the Savior parish effective June 1.

Fr. John Segvich has been assigned as second priest at St. Joseph Parish in Wheaton effective June 1.

Fr. Eugene Wozniak will be leaving St. Matthew parish in Green Bay, WI to move to Ohio. He will not take a parish assignment, but is willing to serve as a supply priest.

Deacon John Thetford, who was serving as Metropolitan Tikhon's secretary, moved to Green Bay. Archbishop Paul ordained him to the priesthood on Lazarus Saturday at Holy Trinity Cathedral in Chicago. He has been assigned as acting rector at St. Matthew in Green Bay as of June 1.

Subdeacon Paul Garklavs, having completed the St. Macrina's Late Vocation Diaconal Course of studies has petitioned to be ordained to the Diaconate. This petition was considered by the OCA's Board of Theological Education and he will be ordained to the Diaconate by Archbishop Paul on his visit to Holy Trinity on June 26, the Feast of the Tikvin Mother of God icon.

Subdeacon Stephen Hansen, having completed his St. Macrina Late Vocation Diaconal Course of studies and passed his final exam in the program. His petition for ordination was presented to the OCA Board of Theological Education. He will be ordained to the Diaconate on July 25 at St. Luke Church.

With improvements in the pandemic, Protodeacon George Potym and Fr. Tom Mueller will hold the Chicago Deanery Summer Camp July 7-10. They will still observe Covid protocols for safety.

Our usual Sunday Lenten Deanery Vespers were hosted virtually by 5 deanery parishes by conducting the service and live streaming them. Each parish rector delivered the homily. The theme was "Our Lenten Exodus: a pilgrimage to PASCHA" Services were held at St. Luke, St. Joseph, Christ the Savior, Ss. Cyril and Methodius and Holy Trinity Cathedral. Speakers included: Fr. Paul Jannakos, Fr. Joseph Kopka, Fr. John Baker, Fr. Elijah Mueller, and Archbishop Paul.

Archpriest Alexander Kuchta

Cleveland Deanery Report June 17, 2021

Clergy Transitions

After more than a one year vacancy, Fr Ján Čižmár has been assigned as Acting Rector of St Theososius Cathedral as of May 9. Fr Ján and his family were received from the Greek Catholic Church during Bright Week. My tenure as Parish Administrator ended June 1.

Fr Alessandro Margheritino, former Rector of St Innocent in Olmstead Falls, Ohio, has assumed his new postiion as Secretary of the OCA as of June 1.

Fr Peter Simko, a recent graduate of St Tikhon's Seminary has been assigned as Acting Rector of St Innocent in Olmstead Falls, Ohio, also as of June 1.

St Vladimir's Camp

Due to a lack of registrants, the Camp will hold only two sessions this year, the weeks of July 4-10, and July 11-17.

Deanery Meeting

Had our first 'in person' Deanery Meeting on Tuesday, May 25 since the Virus. It was great to see the Brethren, all of whon were glad that things in the parishes were returning to normal.

Respectfully submitted.

Fr Andrew Clements

Indianapolis Deanery Report Diocesan Council/Bishops Council 2021

The process of re-opening from the pandemic remains the most significant development throughout the deanery. At this point nearly all parishes are at full capacity with recommendations to follow CDC guidelines on masking. Overall our deanery has not experienced a great deal of loss or conflict over the pandemic guidelines, however, reports have been overwhelming that being able to return to 'normal' especially on coffee hour and full capacity services has been a source of joy and relief.

We have had a few developments in parishes, clergy and missions. Most notably Fr. Joshua Coolman has been assigned to St. Stephen's in Lima, OH, After many years of having no full time priest, this is a true answer to prayer. Fr. Mark Hodges was suspended in January and reinstated as attached to St. Paul in Dayton with restrictions. The deanery, in cooperation with the mission committee, has been working on two outreaches - one in the Muncie, IN area and one in South Bend, IN. The Muncie area outreach (St. Photini Outreach) has been meeting twice a month for Sunday vespers in nearby Gas City. The goal is to move to the more populated Muncie area, partnering in a pan-Orthodox effort, in the fall of 2021. South Bend (St. Brigid Fellowship) had been meeting for bi-monthly gatherings, but has been put on hold for the moment, with the hopes of restarting soon.

In Christ, Archpriest Joel Weir 06/16/2021

REPORT OF THE MINNEAPOLIS DISTRICT DEAN TO THE DIOCESAN COUNCIL June 18, 2021

Parishes:

<u>Minot, ND</u>. We continue to look for a priest for assignment to St Peter the Aleut, ND. The parish has been vacant now for almost two years. It is served roughly once a month by clergy from the Minneapolis Deanery, and also by clergy of other jurisdictions. North Dakota, actually, is a field ripe for harvest. With the 'right' priest serving in Minot, working with the priest in Fargo and the budding Antiochian mission in Bismarck (see below), North Dakota could become a thriving hot spot of evangelism.

The group of Orthodox faithful in Bismarck, ND, were being served by the Minneapolis Deanery through the rector of St Peter the Aleut in Minot, ND, an hour or so north of Bismarck, when there was a rector assigned to Minot. When there was/is no priest assigned to St Peter the Aleut, the Bismarck faithful were served on Saturday morning by whatever priest of the Deanery was providing services at Minot that particular weekend. On Palm Sunday, 2021, one of the faithful of the Bismarck community, was ordained to the diaconate by the Antiochian Archdiocese, and has been directed to work towards building up the faithful in Bismarck into an Antiochian mission. The Minneapolis Deanery, therefore, no longer serves the faithful in Bismarck. The young man who was ordained to the diaconate, with the support of Archbishop Paul, had petitioned for ordination to the diaconate and priesthood with the OCA, but his Sitz im Leben was such that it was not possible for him to satisfy the Synodal requirement to spend a year on campus at one of our Orthodox seminaries. He therefore applied to the Antiochian House of Studies, and was ordained to the diaconate upon his successful completion of that program, and the faithful in Bismarck are now under the care of Metropolitan Joseph.

This could have been an example both of creative evangelism, addressing 'extraordinary circumstances with extraordinary measures,' and of inter-jurisdictional co-operation. I am disappointed it was not.

<u>Fargo, ND</u>. Holy Resurrection Orthodox Mission in Fargo, North Dakota, continues to thrive as a parish. Fr William Rettig is becoming a priest experienced beyond his years from the numerous extraordinary circumstances that he is called upon to negotiate on the prairie!

Holy Myrrhbearers in St Cloud, MN, also has continued her miraculous recovery under the sound pastoral leadership of Fr Andrew Jaye and his wife, Brenda. Holy Myrrhbearers had been downgraded from mission to chapel status several years before Fr AJaye was assigned to serve as 'priest-in-charge.' Fr AJaye was assigned to Holy Myrrhbearers almost two years ago now. Under Fr Jaye, with no little credit going to his wife, the potential Holy Myrrhbearers always had to grow into a thriving Orthodox community in St Cloud is being realized. Attendance, financial giving, the number of inquirers and catechumens, baptized and chrismated converts, has sky-rocketed in the last two years. After visiting Holy Myrrhbearers this last May, Archbishop Paul elevated Holy Myrrhbearers to mission status. But, it may be very soon when Holy Myrrhbearers will be ready for elevation to full parish status.

Pastoral changes:

Fr Ted Wojcik and his wife, the 'Very Karen,' finally retired from all obligations but grandparenting and moved to Pella, IA. They now can be found most Sundays at St Nicholas mission, where Fr Ted will be seen serving with his son, Fr Bart, and the 'Very Karen' standing with her grandkids in the nave.

Early this Spring, Fr Christopher Maciolek was released from the omophorion of Archbishop Paul and was taken under the omophorion of Archbishop Alexander of the Diocese of the South in preparation for accepting assignment to serve St Mary of Egypt Mission in Norcross, GA, beginning July 1. So, they loaded up the truck and moved to Norcross, Georgia just this Tuesday (and Wednesday), June 17 & 18.

Miscellany:

St Mary's [Greek] Inter-jurisdictional or 'Pan' Orthodox Summer Camp is administered cooperatively by staff from several Orthodox parishes in the Twin Cities. Fr Benjamin Tucci of St Mary's Cathedral directs the camp under the leadership of the clergy of St Mary's Greek. The camp was cancelled last summer, but it is up and running again this summer, though under modified conditions due to the Corona Virus. The campers are being divided into two groups, a younger and an older, and will come together separately over two consecutive weeks.

Respectfully submitted Archpriest Paul Wesche District Dean, Minneapolis Deanery