

**MEETING OF THE DIOCESAN COUNCIL OF THE DIOCESE OF THE MIDWEST**  
Doubletree Midway, Chicago, IL • 22 May 2025

**I. OPENING PRAYER.**

The meeting opened with the singing of “Christ is Risen” and blessing of His Eminence, Archbishop Daniel, at 9:27am CST.

**ATTENDANCE.**

- A.** Officers: His Eminence, Archbishop Daniel; Archpriest Herman Kincaid, Chancellor; Priest Esteban Vazquez, Vice Chancellor; Priest Nikolai Lochmatow, Secretary, Subdeacon Dimitri Pletz, Treasurer.
- B.** Deans: Archpriests Alexander Kuchta, Dusan Koprivica, Paul Wesche, Timothy Sawchak, Steven Kostoff, Nicholas Wyslutsky.
- C.** Clergy Delegates: Archpriest Christopher Rowe and Zachariah Trent; Priests John Segvich, Jacob Van Sickle, William Rettig.
- D.** Lay Delegates: Lori Billy, Angela Zekios, John Maddex, Mary Ann Bobulsky.
- E.** Metropolitan Council Representatives: Archpriest John Baker, Basil Kochan.
- F.** Absent: Mark Phillips.

**II. APPROVAL OF MINUTES OF PRIOR MEETING.**

Motion to accept: Archpriest Christopher Rowe. All accepted.

**III. OPERATIONAL REPORTS.**

- A.** Archbishop Daniel: Thanks everyone for taking the time to travel to Chicago and meet, goal is to discuss the mission of the diocese, grateful for dedication of all to ministry and evangelization.
  - a. Many receptions into the church from Great Lent through Pentecost. We must come to understand how many are received and how, as well as number of catechumens. Greeting new people in church is great responsibility.
  - b. Clergy Convocation was successful. Main theme was clergy life and clergy family health.
    - i. Fr. Herman gives a summary of Clergy Convocation: guest speakers Archpriests Andrew Jarmus, Nicholas Solak, Stephen Vernak.
    - ii. Fr. Dusan comments on necessity of healthy relationship between priest and priest wife.
    - iii. Archbishop Daniel Diocese will consider having a clergy convocation that would also involve clergy wives.
    - iv. Angela Zekios asks what laity can do to help with clergy health.
    - v. Archbishop Daniel: Will write to parishes with suggestions on how to help priests and their families. Parishes need to know what can be done to allow the priest to be a priest, husband, father.
    - vi. Fr. Jacob recognizes the challenge of a priest to delegate, in order to develop a sense of responsibility and leadership among parishioners.
  - c. God has blessed us with a plentiful number of seminarians, will have sixteen from our diocese in 2026.
    - i. Seminarians are pre-screened with psychological evaluations and offered additional help if needed.
    - ii. Our duty is to support the seminarians spiritually, emotionally and financially. Diocese has a budget line item for seminarian support, which was increased, but we need participation from parishes as well.

- iii. DOMOCA seminarians have been recognized for outstanding achievement at both Saint Tikhon's Seminary and Saint Vladimir's Seminary.
- iv. DOMOCA seminarians asked by Archbishop Daniel to pray the Akathist to the Mother of God before her Tikhvin Icon on a weekly basis privately, and as a group monthly.
- v. Fr. Herman comments on positive visits to both seminaries, Fr. Esteban speaks to the cohesiveness of their cohort and eagerness to serve in the DOMOCA.
- vi. Presence of new seminarians should be an encouragement and comfort to seasoned priest who can safely consider retirement.
- vii. Two new priests entering our diocese, Father Paul Hodge and Father Andrew Jarmus (Saint Mary's Cathedral). Two more priests who want to enter from other jurisdictions. Diaconal ordination scheduled for Pentecost at Holy Trinity Cathedral.
- viii. Angela Zekios asks about the cost of attendance/housing at seminaries.

**B. Chancellor:**

- a. Chancery working proactively and smoothly. Weekly staff meetings for the Archbishop and diocesan officers.
- b. Chancellor travels to parishes, without serving, to meet with priest and community. Focus is clergy health and well being.
- c. Spoke with junior clergy during Clergy Convocation, initiated mentorship program.
- d. Finance committee meeting approved budget requests for Diocesan Departments.
- e. Expresses gratitude to the diocesan deans for their efforts and leadership.
- f. Available to guide clergy to clergy health initiatives. All concerns will be handled confidentially.
- g. Archbishop Daniel: grateful for Fr. Herman's leadership to clergy, and to himself personally.
- h. Archbishop Daniel: seminarians to have internships, we will need to identify parishes which are able to provide for and create a positive experience for this individual.
- i.

**C. Vice-Chancellor:**

- a. Role focuses on logistics and processes within the diocese. Also periodically travels to parishes with Archbishop.
- b. Communications and decrees transferred to Diocesan Secretary, Priest Nikolai Lochmatow.
- c. Bookkeeping handled by Deacon Nikola Tambur, reporting to Diocesan Treasurer.
- d. Background check and compliance coordinator position offered to Kim Marineau, as a contractor.
- e. System of intake, vetting and evaluation established for minor orders, reader and subdeacon.

- f. Archbishop Daniel: priests must understand responsibility of tonsure and elevation to minor orders – this is a promise for life. Consider spiritual and mental stability of candidates over the long term. Archbishop relies on priest's discernment, as he likely does not know the candidates personally.
- g. Vetting process also applies to seminary applicants from our diocese, including all documentation for future ordination and psychological evaluation.
- h. Updates to proportional giving policy, further details in Treasurer's Report. Financial reports will be due in March going forward. Excel worksheet created for deans to calculate appropriate clergy compensation.
- i. Archbishop: thanks Father Esteban for keeping all of these documents in an orderly manner.

**D. Treasurer:**

- a. Accounting software updated from Quickbooks to Aplos. Payroll software updated. Improved communication and document retention.
- b. Favorable audit report, earlier this week. Will be presented at the Diocesan Assembly.
- c. Reviewing existing ministries; including late vocations program. Review investments and investment strategy.
- d. Financial reports distributed to Diocesan Council members in emailed packet.
- e. 2024: \$12k loss from operating budget, but \$100k increase in investment gains. \$88k net profit.
- f. 2024 Balance Sheet. Parish in Desloge, MO closed in 2019, property came under diocesan ownership and reflected on balance sheet. Similarly, gifted property in Boscobel, WI (Sister Olive).
- g. Approximately \$2.5m in investments, majority are board-restricted. They can be repurposed for endowments, missions, etc.

**E. Metropolitan Council:**

- a. Basil Kochan – Metropolitan Council Report.
- b. All-American Council, canonization of Matushka Olga, 100<sup>th</sup> Saint Tikhon.
- c. FOCA screening of Sacred Alaska Movie, followed by panel discussion with Archbishop Daniel on canonization process.
- d. Pension Board reports better compliance, except for ethnic jurisdictions.
- e. OCA National Office looking at DOMOCA Departments as a model for the national church.
- f. National Chancery property search.
- g. Appointment and confirmation of new chancellor, Archpriest Alessandro Margheritino.
- h. Fr. Paul Wesche asks about pension board – any updates?
- i. Four new members of the pension board will be elected at the AAC.
- j. Archbishop Daniel commends Mary Ann Bobulsky and pension board for their determination and hard work on behalf of the church.
- k. Sdn Dimitri: when does Metropolitan Council look at budget? October. Can the national church consider holding monies in escrow to fund the AAC?

**F. Departmental Reports – see written packet.**

- a. Fr. Christopher Rowe – collaboration with FOCUS. Self-assessment for parishes.
- b. Fr. Jacob Van Sickle – grateful for funding approval.
- c. Fr. Esteban Vazquez – recommends utilizing resources of Saint Andrew of Crete music ministry. Please send proposals for architecture and iconography to Department of Liturgics.
  - i. Archbishop Daniel: Contact Secretary for scheduling and guidance on hierarchal services.
  - ii. Archbishop Daniel: Highly endorses Saint Andrew music ministry, encourages more advertisement/awareness.
  - iii. Fr. Herman: choir director training or basic outline.

**IV. DEANERY REPORTS.**

- A. Chicago. See written report. Moldovan Mission.
- B. Cleveland. See written report. Athens Mission. Saint Tikhon’s celebration planned for Deanery. Mentor and Olmstead Falls parishes supporting St. Andrews. Deanery clergy wives group. Ordinations. Deacon Paul Schlafer – internship at Holy Trinity in Cleveland. Marblehead community booming.
- C. Indianapolis. See written report. Lot of growth. FOCUS chapter in Cincinnati, interjurisdictional cooperation improving.
- D. Kansas City. See written report. Deanery gathering will be at Saint Michael’s for parish feast day in November. Fr. Joseph Winsler starting in Lincoln, NE on June 1.
- E. Detroit. See written report. Fr. Michael Butler retiring on Jan 1, 2026. Prison ministry. Alaska outreach ministry.
- F. Minneapolis. See written report. Dakota Missions District. Bemidji – funds donated in community toward purchase of building.
  - a. Can interest on investments be used annually toward seminarians? Graduating seminarians could be directed toward DMD.

**V. OLD BUSINESS.**

- A. None at this time.

**VI. NEW BUSINESS.**

- A. Sdn Dimitri: Sale of Desloge property. Antiochian western rite mission interested in purchasing, question of priest/timing. Prepare resolution for Diocesan Assembly to give Diocesan Council authority to approve sale.
- B. Sdn Dimitri: Proportional giving update, simplify and consolidate. Ramifications for not submitting annual financial worksheet.
  - i. Archbishop Daniel: Launch investigations into parishes who are continually not paying. Parishes/priests may become liabilities.
  - ii. Motions to update. Fr. Christopher Rowe seconds. All in favor, yes.
- C. Fr. Esteban: Proposed appointments and committees. See last page of packet.
  - i. Motion: John Maddex. Second: Father John Segvich. All in favor, yes.

**VII. BUDGET.**

- A. 2024 Actual, 2025 Budget, 2025 First Quarter Actual, 2025 Projected, 2026 Proposed.
- B. Archbishop Daniel: prefer \$0 budget for a church organization, as a non-profit entity. \$3648 will be moved to insurance – Boscobel property.

- C. Motion to present for adoption at Diocesan Assembly. Fr. Jacob. Second – Mary Ann Bobulsky. All in favor, yes.
- D. Authorize Diocesan Treasurer as a signatory on accounts for Desloge property. Fr. John Segvich. Second – Lori Billy. All in favor, yes.
  - i. Archbishop Daniel thanks chancery/diocesan staff for their dedication and efforts; all clergy and all who serve the Diocesan Council. Largest diocese in OCA, thankful to God for organization and good work. Giving thanks to God for all He has done for us, most of all His Son.

**VIII. DATE OF NEXT MEETINGS, In Person.**

- A. Clergy Convocation – April 27-30, 2026
- B. Diocesan Assembly – Monday, July 14, 2025 (at AAC)
- C. Diocesan Council - December 11, 2025

**IX. ADJOURNMENT.**

- A. Archbishop Daniel thanks chancery/diocesan staff for their dedication and efforts; all clergy and all who serve the Diocesan Council. Largest diocese in OCA, thankful to God for organization and good work. Giving thanks to God for all He has done for us, most of all His Son.
- B. **Motion** – Archpriest Herman, 1:25pm.

Respectfully submitted,  
Priest Nikolai Lochmatow, Diocesan Secretary



## **The Diocese of the Midwest, Orthodox Church in America**

### **Office of the Treasurer**

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### **2024 & January – March 2025 Financial Report Summary**

May 22<sup>nd</sup>, 2025

#### **I. Executive Summary**

- Overall, the Diocese is in a good, stable financial position. Income remains healthy, with improved communication and quarterly reporting of parishes' financial support of the Diocese. Expenses are being kept reasonable and manageable. Volatility in the market is causing investment performance to fluctuate. Although the year ended with a loss of \$12k due to the write-off of bad debt, unrealized investment gains contributed to an overall net profit of \$88k.
  
- A thorough review of the financial books, policies and procedures has been completed and some procedural changes were made to conform with best practices. The Finance Committee reviewed \$172k in old Accounts Receivable and His Eminence blessed the forgiveness of \$104k in uncollectible Accounts Receivable, causing the Income Statement to take a small overall loss for the year, but the Balance Sheet looks much better and more manageable. A shining spot in this clean up is that the financials could bear a large debt forgiveness without too much negative effect. Without the write-off of old A/R, the financials would have been stellar.
  
- Major changes in diocesan financial office in 2024/2025:
  - Turnover in staff
  - Updated and reorganized financial policies and procedures. Further updating & revision is ongoing.
  - Updated and simplified chart of accounts / financial statements. Migrated to new fund accounting (Aplos) & payroll (Gusto) systems.
  - Simplified financial statements. Easier to navigate and follow.
  - Mostly paperless documentation retention system is working well.
  - Simplified Investment tracking and reporting.

- Q1 2025 YTD Benchmark should be at 25% of Annual Budget. Income is on track, but expenses are slightly higher than budget due to some one-time occurrences (e.g. Seminarian support, Archbishop's car loan payoff, Mission Grant)
- 2025 investment performance is fluctuating due to recent market changes and tariff fears, causing performance to become volatile. The hope is the market stabilizes and continues with modest growth. Need to review & reassess our investment strategy.
- Future expected changes in 2025:
  - Investment Funds review – *partially complete*
  - Update proportional giving policy and simplify Form 1 worksheet
  - Update policies and procedures on clergy compensation and taxes
  - Revision and publication of Parish Audit Guidelines

## II. Operating Funds Performance vs Budget

Our diocesan financial reports are based on an accrual-basis accounting methodology. This means that when revenue is invoiced, or an expense is incurred, it is recorded on the date of that transaction, regardless of when the money actually enters or leaves the bank account. For revenue under this methodology, it is best to look at revenue on the Income Statement as well as the Accounts Receivable line item on the Balance Sheet. The Income Statement will show the revenue recorded, and the Balance Sheet will show how much of that revenue has been received. Likewise with expenses: the Income Statement will show what has been expensed, and the Accounts Payable line item on the Balance Sheet will show how much is yet to be disbursed.

A cash-basis accounting methodology is where transactions are recorded strictly based on when the money enters or leaves the bank account. Most cash-based businesses use this accounting method.

The Operating Fund shows the revenues and expenses necessary to run the operations of the Diocese. The actual activities are compared to the budget to determine how closely the Diocese has operating to how it was expected to operate. If there are major variances compared to the budget, they should be identified and explained. This report should give a clear indicator of how much of the budget has not been spent yet (or spent in excess of the budget).

- Total Revenues ended at \$1.286m, or approximately 100% of budget, despite \$104k of write-off due to old parish assessment invoices that were deemed uncollectable.
  - Conference income was greater than expected, but ultimately not enough to cover expenses.
  - Background check income/expense was non-existent in 2024. This is expected to change for 2025.
  - Support our Seminarian fundraising income has been moved to the balance sheet as the Diocese is acting as a passthrough for this program. The amount shown on the Income Statement is for January - February 2024, and was disbursed in 2024.

- 2024 Expenses were slightly over budget at \$1.298m, or 101% of budget.
- Uncategorized Expenses were mostly credit card expenses waiting for proper documentation to be correctly classified as expenses. A new credit card receipt procedure was instituted in 2024 resulting in greater success in getting receipts than in the past. This was one of the items needing improvement the auditors pointed out in the last audit report.
- Total Net Operating Income was a loss of \$12,097.
  - Adding in depreciation and investment performance, the Total Net Income was a gain of \$88,145.

### III. Restricted Funds Performance

An analysis was initiated to identify the restricted funds and investment holdings of the Diocese, the various funds it has purposed or received, and how best to report those balances and performance. Some progress has been made, but more work is on-going on this project. The goal is to determine which purposes the Diocese should restrict money for, and whether any consolidation of existing funds should occur to fulfil the Diocese's mission. Within Restricted Funds are Council Designated Funds and Donor Restricted Funds.

Council Designated Funds are funds that the Diocesan Council has designated to be set aside for a specific purpose but ultimately control the use of these funds and can repurpose them at will. See the "Investment Funds" attachment for activity and balances of these funds, or the "Equity" section below. Examples of this are most of our investment funds.

Donor Restricted Funds are monies a donor has given with a specific purpose established. These monies can only be used for that purpose, unless the donor gives permission to be used for a different purpose. Examples of this are the "Dakota Mission District" and "Mother Maria of Paris" accounts.

### IV. Balance Sheet

The Balance Sheet is a financial report showing the balances of all the monies, properties, other assets, along with liabilities, loans, and other monies it is expected to pay out that the Diocese either has or is expecting to receive. It is a "snapshot" of the balances of the Diocese on a particular date.

#### Assets

Assets are monies, properties, items, etc. that have value that are recorded in this section of the balance sheet. Assets also include monies and items of value that are due to be received but have not yet been received. *Current Assets* are expected to be received within 1 year. *Long-Term Assets* are monies expected to be received in excess of 1 year (e.g. OCCIF investment).

- The dissolution of the Nativity of the Virgin Mary parish in Desloge, MO brought its assets under the management of the Diocese in September 2019. These assets were never added



to the diocesan financial statements but are included now. There are 2 Certificates of Deposit (CD) for \$26,000 and \$26,951, respectively. Also included is a bank account for the cemetery located there for \$7,690 and another bank account for general maintenance for \$603. This property is being rented out, and it is the hope that the tenants eventually submit an offer to purchase the property.

- Accounts Receivable - are monies the Diocese has invoiced for or has recorded a transaction as income but has not yet received the actual cash for it yet. This is where the parish assessments go, for instance. Ideally, it is best to get this as close to zero as possible. Near the end of 2024, it was deemed accounts receivable was too high and a review was conducted to determine the balance of each parish's outstanding assessment to the Diocese was.
  - The Accounts Receivable Aging Summary Report shows how long the Diocese has been waiting to receive money from parishes. It is normal to see a balance within 30 days, but beyond 60 days is discouraged. The older invoices go unpaid, the harder it is to collect on them, leading to potential write-offs.
- Other Assets - Added the Nativity of the Virgin Mary property in Desloge, MO to the balance sheet, as this property has reverted to Diocesan ownership. Valuation of this property should be recorded according to the fair-market value of the real estate at the time of possession, or if barring that, the tax-assessed value per the County Assessor's Office.
- Fixed Asset Depreciation – using the accrual-basis accounting, some items need not be expensed completely upon purchase (e.g. computers, automobiles, furniture, etc.). They can be expensed incrementally each year throughout the span of their useful life. The Fixed Assets section therefore shows the balance of these depreciable assets, and how much useful life they have remaining until they are fully expensed. Fixed Assets will need to be reviewed in the near future to determine if we still have these assets in our possession, and if some have been completely dissolved or salvaged.

### Liabilities

Liabilities are monies and other items that are due to others. They are listed on the balance sheet section here as they are currently in the company's possession but are expected to be paid out. *Current Liabilities* are items to be paid out within 1 year (e.g. taxes). *Long-Term Liabilities* are ongoing items needing to be paid out longer than 1 year (e.g. loans).

- Other Current Liabilities balance is comprised of an All-American Council bill to the OCA, other bills to be paid in 2025, and Support our Seminarian fundraising monies that have been collected by the parishes.

### Equity

The equity section of the balance sheet shows the balances of funds and accounts the diocese owns. Equity is usually the difference between Assets and Liabilities [Assets – Liabilities = Equity].

- Donor Restricted Funds – this section shows equity that is reserved for a specific purpose and can only be used in fulfillment of that purpose. This is usually at the express direction of a donor who places conditions on the receipt of the gift.
- Council Designated Funds – this section shows the various balances of designated funds set aside as council-designated funds for specific purposes. Council-designated funds have a self-imposed restriction which can be changed with the approval of the Diocesan Council.
- Unrestricted Funds – no restrictions are placed on these monies and can be utilized however the organization decides.
- Invested Funds and their balances, noting the change in value compared to the prior year are below. Whereas before they were listed all together, here they are separated according to their restricted designation.

Invested Diocesan Funds	Ending 12/31/2023	Ending 12/31/2024
Family Trust Fund	\$56,881	\$59,622
Monastery Reserve Fund	\$10,320	\$10,891
Donor Restricted Funds	<b>\$ 67,201</b>	<b>\$ 70,513</b>
AAM Equity Reserve	\$ 465,775	\$ 523,903
AAM MF Reserve	\$ 686,276	\$ 710,543
ArchBp Scholarship Reserve	\$ 19,785	\$ 23,651
Auto Reserve	\$ 45,818	\$ 55,395
Legal Reserve	\$ 74,652	\$ 93,516
Maintenance Reserve	\$ 63,343	\$ 74,628
Mission Projects	\$ 104,447	\$ 112,560
Special Visits Reserve	\$ 6,247	\$ 7,180
Council Designated Funds	<b>\$ 1,466,341</b>	<b>\$ 1,601,376</b>
Unrestricted	<b>\$ 637,357</b>	<b>\$ 903,873</b>
<b>Total</b>	<b>\$ 2,170,899</b>	<b>\$ 2,575,762</b>

## V. Investment Activities / Trends

Invested funds are those gifts or excess cash that are set aside in hopes they will garner a return greater than if they were to stay as simply cash. Various options exist such as stocks, CD's, bonds, mutual funds, etc. and are purchased or sold on the open market. There is some risk involved with engaging in the open market with one's money, but there is also potential for greater returns which can increase the value of the monies invested. Care must be given with regards to invested funds to reduce acceptable risk, especially church funds, to minimize the potential for erosion of invested

funds and an overall decrease in their value. It is expected and normal to see volatility and fluctuation in the balances of invested funds, but the hope is that they grow and increase over time.

- Overall, the diocese's investment funds have performed well in 2024 but have seen some dramatic volatility in Q1 2025 due to economic factors mostly relating to recent tariff fears and their downstream effects. We have seen steady increases each month this year resulting in growth of ~~\$313,276~~ \$404,863 in 2024 despite a few negative months in both April and October. We have rebalanced our mix of funds within each portfolio to minimize risk and stay within the targeted portfolio blend. The Finance Committee has been designated to review the risk and blend of the diocese's invested funds and portfolios and will continue to assess performance to achieve future returns and growth.
  - We maintain a consolidated portfolio balance of \$2.58 million in investments
- With an anticipated future review of invested funds in 2025, the hope is to identify what funds can be consolidated (if any) and what further amounts can be utilized to further the financial needs of our departments, while protecting the health and viability of the funds for the future.

## **VI. Preliminary 2026 Budget – DRAFT**

The Finance Committee met and reviewed a first draft of a potential budget for 2026, and some highlights are mentioned below. The Diocesan Council will need to review and approve the 2026 budget before it is presented to the Diocesan Assembly in July for final approval. The highlights of the 2026 budget below are subject to change, and should not be considered final.

- Parish growth has increased expected revenues from \$1.418m to \$1.543m, despite twelve parishes failing to report their 2024 revenue to the Diocese. Also included are five parishes who are receiving assessment relief for 2026.
- Given the number of seminarians to be enrolled in seminary next academic year will be almost doubled, the Diocese will be doubling its financial support from \$50k to \$100k.
- Several departments have requested funding for programmatic endeavors to further their ministry goals.
- To ease the financial burden on parishes for future All-American Council costs that the OCA distributes to the dioceses, the Diocese of the Midwest will be accruing for this expense each year and will pay the total cost to the Diocese for all future All-American Councils. The hope is that this policy will encourage more parishes from our Diocese to attend All-American Councils and participate in this important aspect of church life.
- Depreciation expense is added to the 2026 budget, recognizing the depreciable assets of the Diocese. This was not added in prior budgets.

## **VII. Parish Receivables**

This section of the report will be reserved for those parishes who are significantly delinquent in their financial support of the Diocese. Parishes listed are encouraged to contact the Diocesan Treasurer directly to get more information and how they can resolve their open

balances. Statements for Q1 2025 have been distributed, showing exactly all the transactions between each parish and the Diocese so parishes can compare their records and resolve their outstanding balance with the Diocese.

As of the end of March 2025, the following parishes were more than 60 days behind on their diocesan support:

- St. Macarius (Chicago, IL)
- St. Matthew (Green Bay, WI)
- St. Nicholas (Columbus, OH)
- St. Thomas (Kokomo, IL)
- Theotokos Unexpected Joy (Ash Grove, MO)
- Joy of All Who Sorrow (Joplin, MO)
- St. Nicholas (Lawrence, KS)
- St. John of Kronstadt (Lincoln, NE)
- Holy Trinity (Overland Park, KS)
- St. Michael (St. Louis, MO)
- St. Thomas (Springfield, MO)
- Holy Transfiguration (Livonia, MI)
- St. Herman (Minneapolis, MN)

**VIII. Financial Statements (see attached)**

- a. 2024 Actual vs Annual Budget (incl %)
- b. Balance Sheet - December 2024
- c. Consolidated Q1 2025 YTD Actual vs Budget (incl %)
- d. Consolidated Balance Sheet – March 2025
- e. Preliminary 2026 Budget

## Consolidated Balance Sheet as of 03/31/2025

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Account Number	Account Name	Amount
<b><u>Assets</u></b>		
<b><u>Unrestricted Cash Assets</u></b>		
1000	Bank of America (3437) - Gen Fund	169,487.92
1001	First State Community Bank (7239)	7,754.42
1002	New Era Bank (1444)	602.83
1003	Desloge CD (2625)	26,000.00
1004	Desloge CD (3239)	27,016.59
<b>Total Unrestricted Cash Assets</b>		<b>230,861.76</b>
<b><u>Restricted Cash Assets</u></b>		
1005	Bank of America (6674) - Dakota Mission District	4,255.00
1006	Bank of America (9966) - Mother Maria Paris	20,709.67
<b>Total Donor Restricted Cash Assets</b>		<b>24,964.67</b>
<b><u>Investments</u></b>		
1010	MS Invested Funds	0.00
1011	Mission Development -8772	274,426.83
1012	General Operating Reserve -5403	70,487.78
1013	Legal Reserve -5800	78,932.46
1014	ABp Scholarship Fund -5820	52,145.13
1015	Auto Reserve Fund -5835	56,057.37
1016	Special Visit Fund -9340	7,317.94
1017	Maintenance Reserve Fund	74,791.62
1018	Mission Projects Fund -7627	113,654.15
1019	AAM Equity Fund -8093	530,712.95
1020	AAM MF Reserve -8044	721,985.49
1021	General Operating Income Fund -0309	233,379.67
1022	Mission Dev Income Fund -8774	308,951.36
1025	Monastery Fund -7463	11,352.32
1026	Petrykowski Trust Fund -0310	60,200.91
<b>Total 1010 - MS Invested Funds</b>		<b>2,594,395.98</b>
1030	OCCIF Investment	200,000.00
<b>Total Investments</b>		<b>2,794,395.98</b>
<b><u>Accounts Receivable</u></b>		
1100	Parish Assessments	61,613.29
1101	Other Receivables	15,820.62
1102	Credit balance parish assessments	(12,613.36)
<b>Total Accounts Receivable</b>		<b>64,820.55</b>
<b><u>Other Current Assets</u></b>		
1120	Due From Employees	448.90

## Consolidated Balance Sheet as of 03/31/2025

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Account Number	Account Name	Amount
<b>Total Other Current Assets</b>		448.90
<b>Fixed Assets</b>		
1400	Computer Equip	3,983.24
1401	Accum. Depr. Computers	(1,924.13)
<b>Total 1400 - Computer Equip</b>		2,059.11
1410	Equip & Machinery	7,827.99
1411	Accum. Depr. Equip & Machinery	(6,989.25)
<b>Total 1410 - Equip &amp; Machinery</b>		838.74
1420	Furniture	15,230.81
1421	Accum. Depr. Furniture	(7,420.40)
<b>Total 1420 - Furniture</b>		7,810.41
1440	Leasehold Improvements	104,314.24
1441	Accum. Depr. LHI	(23,388.33)
<b>Total 1440 - Leasehold Improvements</b>		80,925.91
1450	Buildings	60,405.74
1451	Accum. Depr. Buildings	(6,669.80)
<b>Total 1450 - Buildings</b>		53,735.94
1500	Diocesan Properties	0.00
1510	Desloge, MO	192,780.00
<b>Total 1500 - Diocesan Properties</b>		192,780.00
<b>Total Fixed Assets</b>		338,150.11
<b>Total Assets</b>		<b>3,453,641.97</b>
<b>Liabilities</b>		
<b>Current Liabilities</b>		
2000	Accounts Payable	52,002.13
2001	BofA credit card (9080)	1,086.11
2010	Seminarian Support	17,321.76
<b>Total Current Liabilities</b>		70,410.00
<b>Pension Withholding</b>		
2230	EE Pension Withholding	(0.05)
2235	ER Pension Payable	(0.01)
<b>Total Pension Withholding</b>		(0.06)
<b>Total Liabilities</b>		<b>70,409.94</b>
<b>Equity</b>		
<b>Unrestricted Net Assets</b>		
3000	Unrestricted	760,638.18
<b>Total Unrestricted Net Assets</b>		760,638.18
<b>Council Restricted Funds</b>		

## Consolidated Balance Sheet as of 03/31/2025

Generated by treasurer@domoca.org on 2025-04-28 11:05

Account Number	Account Name	Amount
3301	Council Restricted Funds	2,495,842.75
	<b>Total Council Restricted Funds</b>	<b>2,495,842.75</b>
<b><u>Donor Restricted Funds</u></b>		
3300	Donor Restricted Funds	126,751.10
	<b>Total Donor Restricted Funds</b>	<b>126,751.10</b>
	<b>Total Equity</b>	<b>3,383,232.03</b>
	<b>Total Liabilities + Total Equity</b>	<b>3,453,641.97</b>

### **Treasurer Notes:**

Overall, the Diocese is in a healthy financial position.

Added cash reserves from Desloge, MO property (2 checking accts + 2 CDs)

Parish Receivables have improved dramatically from Dec 2024.

Other Receivables are for the 21st All-American Council still uncollected.

Credit balance parish assessments are overpayments from parishes that will reduce over the year.

Parish properties: need to get valuation of Boscobel, WI property and add to Balance Sheet.

Accounts Payable: OCA diocesan assessment + OCA Pension Fund for March 2025.

Seminarian Support is remainder of parish fundraising efforts. Will be paid later in the year.

## Consolidated Income Statement by Month for Q1 2025

Generated by treasurer@domoca.org on 2025-04-28 10:13

Account No	Account Name	Jan	Feb	Mar	YTD Amount	Annual Budget	%
<b>Income</b>							
<b>Donations</b>							
4000	Parish Assessments	118,027.51	118,027.51	117,501.58	353,556.60	1,418,493.14	25%
4005	Restricted Fund Income	500.00	1,600.00	0.00	2,100.00	0.00	
4010	Other Contributions	0.00	1,170.07	1,500.00	2,670.07	2,000.00	134%
<b>Total Donations</b>		<b>118,527.51</b>	<b>120,797.58</b>	<b>119,001.58</b>	<b>358,326.67</b>	<b>1,420,493.14</b>	<b>25%</b>
<b>Conferences &amp; Meetings</b>							
4100	Diocesan Assembly	0.00	0.00	0.00	0.00	13,500.00	0%
4101	Convocations	0.00	0.00	600.00	600.00	13,800.00	4%
<b>Total Conferences &amp; Meetings</b>		<b>0.00</b>	<b>0.00</b>	<b>600.00</b>	<b>600.00</b>	<b>27,300.00</b>	<b>2%</b>
<b>Department Income</b>							
4510	Dept of Christian Education	1,250.00	0.00	1,000.00	2,250.00	15,000.00	15%
<b>Total Department Income</b>		<b>1,250.00</b>	<b>0.00</b>	<b>1,000.00</b>	<b>2,250.00</b>	<b>15,000.00</b>	<b>15%</b>
<b>Other Income</b>							
4110	Rental Income	541.67	2,141.67	541.67	3,225.01	6,500.00	50%
4115	Background Check Income	0.00	0.00	0.00	0.00	3,500.00	0%
4800	Special Events	0.00	0.00	790.76	790.76	0.00	
4900	Interest Earned	66.06	63.87	3,000.33	3,130.26	0.00	
4998	Write-offs / Discounts	0.00	0.00	0.00	0.00	(15,000.00)	0%
4999	Uncategorized Income	11.75	0.00	0.00	11.75	500.00	2%
<b>Total Other Income</b>		<b>619.48</b>	<b>2,205.54</b>	<b>4,332.76</b>	<b>7,157.78</b>	<b>(4,500.00)</b>	<b>-159%</b>
<b>Investment Activity</b>							
4600	Investment Gain/(Loss)	54,329.44	(7,151.49)	(55,468.75)	(8,290.80)	0.00	
<b>Total Investment Activity</b>		<b>54,329.44</b>	<b>(7,151.49)</b>	<b>(55,468.75)</b>	<b>(8,290.80)</b>	<b>0.00</b>	
<b>Total Income</b>		<b>174,726.43</b>	<b>115,851.63</b>	<b>69,465.59</b>	<b>360,043.65</b>	<b>1,458,293.14</b>	<b>25%</b>
<b>Expense</b>							
<b>OCA Expenses</b>							
7500	OCA Assessments	36,629.50	30,226.16	43,572.68	110,428.34	477,187.67	
<b>Total OCA Expenses</b>		<b>36,629.50</b>	<b>30,226.16</b>	<b>43,572.68</b>	<b>110,428.34</b>	<b>477,187.67</b>	<b>23%</b>
<b>Payroll Expenses</b>							
7000	Compensation	35,849.84	36,249.84	35,849.84	107,949.52	395,722.14	27%



## Consolidated Income Statement by Month for Q1 2025

Generated by treasurer@domoca.org on 2025-04-28 10:13

Account No	Account Name	Jan	Feb	Mar	YTD Amount	Annual Budget	%
7005	Stipends	3,942.50	4,392.50	4,142.50	12,477.50	69,703.33	18%
7010	Employee Benefits	7,956.02	6,792.95	6,792.95	21,541.92	86,590.39	25%
7030	Payroll Taxes	997.00	912.83	1,077.32	2,987.15	27,809.43	11%
7040	Payroll Fees	0.00	89.92	89.92	179.84	500.00	36%
<b>Total Payroll Expenses</b>		<b>48,745.36</b>	<b>48,438.04</b>	<b>47,952.53</b>	<b>145,135.93</b>	<b>580,325.29</b>	<b>25%</b>
<b>Professional Fees</b>							
7100	Accounting Fees	107.91	50.61	232.40	390.92	7,500.00	5%
7105	Auditors Exp	0.00	0.00	0.00	0.00	1,200.00	0%
7110	Legal Fees	0.00	0.00	0.00	0.00	1,200.00	0%
7120	Investment Mgmt Fees	1,016.47	984.10	1,074.51	3,075.08	7,000.00	44%
7130	Misc. Professional Fees	0.00	0.00	0.00	0.00	8,000.00	0%
<b>Total Professional Fees</b>		<b>1,124.38</b>	<b>1,034.71</b>	<b>1,306.91</b>	<b>3,466.00</b>	<b>24,900.00</b>	<b>14%</b>
<b>Office Expenses</b>							
7200	Office Rent	2,500.00	2,500.00	2,500.00	7,500.00	30,000.00	25%
7210	Office Supplies	152.49	0.00	0.00	152.49	3,500.00	4%
7215	Hospitality	384.00	128.90	0.00	512.90	5,000.00	10%
7220	Software Expense	121.14	18,743.61	121.14	18,985.89	22,820.00	83%
7230	Bank Fees	30.30	19.00	31.80	81.10	900.00	9%
7240	Utilities	379.02	811.10	1,197.64	2,387.76	6,300.00	38%
7250	Office Equip	92.59	92.59	298.28	483.46	2,900.00	17%
7260	Other Office Expense	0.00	3,631.40	1,412.58	5,043.98	1,500.00	336%
<b>Total Office Expenses</b>		<b>3,659.54</b>	<b>25,926.60</b>	<b>5,561.44</b>	<b>35,147.58</b>	<b>72,920.00</b>	<b>48%</b>
<b>Program Expense</b>							
7700	Charity	0.00	1,000.00	0.00	1,000.00	3,500.00	29%
7710	Seminarian Support	25,000.14	0.00	0.00	25,000.14	50,000.00	50%
7715	Other Scholarships	0.00	0.00	0.00	0.00	1,000.00	0%
<b>Total Program Expense</b>		<b>25,000.14</b>	<b>1,000.00</b>	<b>0.00</b>	<b>26,000.14</b>	<b>54,500.00</b>	<b>48%</b>
<b>Conferences</b>							
7600	Diocesan Assembly	0.00	0.00	0.00	0.00	13,500.00	0%
7610	Convocation	0.00	0.00	0.00	0.00	13,800.00	0%
<b>Total Conferences</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>27,300.00</b>	<b>0%</b>

## Consolidated Income Statement by Month for Q1 2025

Generated by treasurer@domoca.org on 2025-04-28 10:13

Account No	Account Name	Jan	Feb	Mar	YTD Amount	Annual Budget	%
<b><u>Insurance</u></b>							
7300	Property Insurance	0.00	0.00	2,369.25	2,369.25	13,898.00	17%
7305	Liability Insurance	1,642.00	0.00	0.00	1,642.00	3,843.00	43%
7310	Auto Insurance	188.82	32.00	32.00	252.82	2,192.88	12%
	<b>Total Insurance</b>	<b>1,830.82</b>	<b>32.00</b>	<b>2,401.25</b>	<b>4,264.07</b>	<b>19,933.88</b>	<b>21%</b>
<b><u>Travel</u></b>							
7400	Chancery Travel	1,921.05	(534.83)	40.00	1,426.22	42,000.00	3%
7405	Deans	0.00	0.00	448.93	448.93	1,200.00	37%
7410	Automobile Exp	33,124.60	151.43	0.00	33,276.03	11,845.84	281%
7421	Diocesan / Bishop's Council	0.00	0.00	0.00	0.00	24,000.00	0%
7422	Metropolitan Council	0.00	0.00	0.00	0.00	1,000.00	0%
7480	Other Travel Expense	0.00	304.98	0.00	304.98	0.00	
	<b>Total Travel</b>	<b>35,045.65</b>	<b>(78.42)</b>	<b>488.93</b>	<b>35,456.16</b>	<b>80,045.84</b>	<b>44%</b>
<b><u>Department Expense</u></b>							
7510	Dept of Christian Education Exp	1,786.24	2,923.61	5,386.24	10,096.09	38,300.00	26%
7520	Dept of Christian Service & Humanita	400.00	927.48	400.00	1,727.48	4,800.00	36%
7530	Dept of Clergy & Family Life Exp	0.00	0.00	0.00	0.00	4,800.00	0%
7540	Dept of Communications Exp	403.64	403.64	403.64	1,210.92	4,951.68	24%
7550	Dept of Evangelization Exp	0.00	0.00	0.00	0.00	4,800.00	0%
7560	Dept of Liturgical Practice Exp	400.00	942.60	400.00	1,742.60	8,800.00	20%
	<b>Total Department Expense</b>	<b>2,989.88</b>	<b>5,197.33</b>	<b>6,589.88</b>	<b>14,777.09</b>	<b>66,451.68</b>	<b>22%</b>
<b><u>Depreciation Expense</u></b>							
7800	Depreciation	1,030.45	1,030.45	1,030.45	3,091.35	0.00	
	<b>Total Depreciation Expense</b>	<b>1,030.45</b>	<b>1,030.45</b>	<b>1,030.45</b>	<b>3,091.35</b>	<b>0.00</b>	
<b><u>Misc Expenses</u></b>							
7900	Bishop Discretionary	0.00	0.00	0.00	0.00	1,200.00	0%
7910	Special Events	0.00	0.00	223.55	223.55	0.00	
7920	Accrued Expense - Liabilities	0.00	0.00	0.00	0.00	28,333.33	0%
7930	Restricted Funds Expense	10,000.00	0.00	0.00	10,000.00	10,000.00	100%
7998	Other Misc. Expense	0.00	0.00	0.00	0.00	1,250.00	0%
7999	Uncategorized Expense	3,298.73	5,302.93	416.74	9,018.40	13,945.45	65%

## Consolidated Income Statement by Month for Q1 2025

Generated by treasurer@domoca.org on 2025-04-28 10:13

Account No. Account Name	Jan	Feb	Mar	YTD Amount	Annual Budget	%
<b>Total Misc Expenses</b>	13,298.73	5,302.93	640.29	19,241.95	54,728.78	35%
<b>Total Expense</b>	<b>169,354.45</b>	<b>118,109.80</b>	<b>109,544.36</b>	<b>397,008.61</b>	<b>1,458,293.14</b>	<b>27%</b>
<b>Net Income (Loss)</b>	<b>5,371.98</b>	<b>(2,258.17)</b>	<b>(40,078.77)</b>	<b>(36,964.96)</b>	<b>0.00</b>	

**Treasurer Notes:**

Overall, income is tracking squarely with the budget, while expenses are slightly higher. However, the downward turn and volatility in the economic market has caused our investment performance to take a downward turn, accounting for most of the higher expenses. Excepting that loss in investments, the operating fund is on track with budget. YTD actual should be 25% of budget.

Parish assessments are slightly lower due to approved 1 additional parish relief.

Rent is higher than budget due to the Boscobel, WI property.

Software Expense is due to one-time expense in Feb for the Diocesan app.

Utilities are higher due to the Desloge, MO property.

Other Office Expense is the psychological evaluations the Diocese requires.

Automobile Exp higher due to payoff of Archbishop's car loan. Expecting reimbursement from investments.

Uncategorized Expense is unattributed credit card expenses awaiting receipts.

Depreciation was unbudgeted for.

OCCIF interest was unbudgeted for.

**Diocese of the Midwest**  
**Balance Sheet**  
As of December 31, 2024

	<u>Total</u>	
<b>ASSETS</b>		
<b>Current Assets</b>		
<b>Bank Accounts</b>		
Bank of America Checking- (3437)	197,890.17	
Bank of America Checking- (8445)	-1,243.49	negative balance from 2022
<b>Checking Accounts- Restricted</b>		
Archangel Michael Checking- (6674)	31,000.00	
Desloge CD (2625)	26,000.00	
Desloge CD (3239)	26,950.85	
First State Community Bank (7239)	7,689.90	Desloge, MO bank acct
MMP Checking - (9966)	20,709.67	
New Era Bank (1444)	602.83	Desloge, MO bank acct
<b>Total Checking Accounts- Restricted</b>	<b>\$ 112,953.25</b>	
<b>Portfolio Investments</b>		
MS 8772 Inv Advisory Fund	0.00	
<b>Total MS 8772 Inv Advisory Fund</b>	<b>\$ 2,272,546.71</b>	
MS 8774 Basic Sec Income Fund		
<b>Total MS 8774 Basic Sec Income Fund</b>	<b>\$ 303,215.15</b>	
<b>Total Portfolio Investments</b>	<b>\$ 2,575,761.86</b>	total investment holdings
<b>Total Savings Bonds</b>	<b>\$ 0.00</b>	
<b>Total Bank Accounts</b>	<b>\$ 2,885,361.79</b>	
<b>Accounts Receivable</b>		
Accounts Receivable Parishes	27,003.36	net parish assessments & rent
AAC A/R from Parishes	84,139.99	AAC
<b>Total Accounts Receivable Parishes</b>	<b>\$ 111,143.35</b>	
<b>Total Accounts Receivable</b>	<b>\$ 111,143.35</b>	
<b>Other Current Assets</b>		
Due from Bank of America	0.00	
Due from Employees	0.00	
Employee Advance	0.00	
Investment in OCCIF	200,000.00	
Other Receivables	0.00	
Prepaid Expense-Other	3,956.25	Jan 2025 expenses
Prepaid PR Expenses	0.00	
Undeposited Funds	0.00	
<b>Total Other Current Assets</b>	<b>\$ 203,956.25</b>	
<b>Total Current Assets</b>	<b>\$ 3,200,461.39</b>	
<b>Fixed Assets</b>		
<b>Depreciable Assets</b>		
<b>Total Depreciable Assets</b>	<b>\$ 147,461.51</b>	
<b>Total Fixed Assets</b>	<b>\$ 147,461.51</b>	
<b>Other Assets</b>		

<b>Church Properties</b>	
<b>Desloge, MO Property</b>	
Desloge Property - Bldgs	180,180.00
Desloge Property - Land	12,600.00
<b>Total Desloge, MO Property</b>	<b>\$ 192,780.00</b>
<b>Total Church Properties</b>	<b>\$ 192,780.00</b>
<b>Total Other Assets</b>	<b>\$ 192,780.00</b>
<b>TOTAL ASSETS</b>	<b>\$ 3,540,702.90</b>

**LIABILITIES AND EQUITY**

**Liabilities**

**Current Liabilities**

    Accounts Payable 0.00

**Total Accounts Payable \$ 0.00**

**Credit Cards**

    Business Credit Card- 5354 0.00

    Business Credit Card- 9080 -215.51 overpaid cc

**Total Credit Cards -\$ 215.51**

**Other Current Liabilities**

    Due to OCA Assessments 56,092.66 AAC assessment

    Accrued Expenses 44,122.46 Dec 2024 OCA assessment + FOS Tours bill

**Total Payroll Liabilities \$ 0.00**

    Seminarian Scholarships 29,717.38 Seminarian appeal in 2024

**Total Other Current Liabilities \$ 129,932.50**

**Total Current Liabilities \$ 129,716.99**

**Long-Term Liabilities**

**Total Liabilities \$ 129,716.99**

**Equity**

    Opening Balance Equity 61,243.25

**Real Estate Property**

**Desloge, MO**

    Desloge, MO - Buildings 180,180.00

    Desloge, MO - Land 12,600.00

**Total Desloge, MO \$ 192,780.00**

**Total Real Estate Property \$ 192,780.00**

    Retained Earnings 0.00

**Temp. Restricted Net Assets**

    AAM Equity Reserve (\*8093) 523,902.52

    AAM MF Reserve (\*8044) 710,542.86

    ArchBp Scholarship Reserve (\*5820) 23,651.47

    Auto Reserve (\*5835) 55,395.47

    Legal Reserve (\*5800) 93,515.59

    Maintenance Reserve (\*9341) 74,628.05

    Mission Projects (\*7627) 112,560.31

    Monastery Reserve (\*7463) 10,890.72

    Petrykowski Family Trust Fund (\*0310) 59,621.52

Special Visit Reserve (*9340)		7,179.76
<b>Total Temp. Restricted Net Assets</b>	<b>\$</b>	<b>1,671,888.27</b>
Unreal Gain (Loss) on SvgBonds		
<b>Total Unreal Gain (Loss) on SvgBonds</b>	<b>\$</b>	<b>0.00</b>
Unreal Gain (Loss) on Invest		
Fidelity		
S-T Gain (Loss) on Investments		
<b>Total S-T Gain (Loss) on Investments</b>	<b>\$</b>	<b>0.00</b>
<b>Total Fidelity</b>	<b>\$</b>	<b>0.00</b>
MS 8772 Inv Adv (Port Fund)		0.00
<b>Total MS 8772 Inv Adv (Port Fund)</b>	<b>\$</b>	<b>349,300.25</b>
MS 8774 Basic Sec (Inc Fund)		0.00
8774 LT Gain (Loss) on Invest		
<b>Total MS 8774 Basic Sec (Inc Fund)</b>	<b>\$</b>	<b>57,139.27</b>
Smith Barney 2541 (deleted)		
2541 ST Gain(Loss) on Invest		0.00
<b>Total Smith Barney 2541 (deleted)</b>	<b>\$</b>	<b>0.00</b>
<b>Total Unreal Gain (Loss) on Invest</b>	<b>\$</b>	<b>406,439.52</b>
<b>Unrestricted Net Assets</b>		<b>938,778.93</b>
<b>Perm. Restricted Net Assets</b>		
Arch Michael Church- Restricted Assets		31,000.00
MMP- Restricted Assets		20,709.67
<b>Total Perm. Restricted Net Assets</b>	<b>\$</b>	<b>51,709.67</b>
<b>Net Income</b>		<b>88,145.27</b>
<b>Total Equity</b>	<b>\$</b>	<b>3,410,984.91</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$</b>	<b>3,540,701.90</b>

Monday, May 5, 2025 11:28:01 AM GMT-8 - Accrual Basis

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
 January - December 2024

	Total		
	Actual	Budget	% of Budget
<b>Income</b>			
<b>Assessment Income</b>	1,317,281.24	1,229,680.62	107.1%
Parish Assessment Write-off	-104,131.33		
<b>Total Assessment Income</b>	<b>\$ 1,213,149.91</b>	<b>\$ 1,229,680.62</b>	<b>98.7%</b>
<b>Conferences &amp; Seminars</b>			
Canon Law Conference	3,600.00		
Convocation Income	17,025.00	13,800.00	123.4%
Diocesan Assembly Income	15,800.00	13,500.00	117.0%
Protect My Ministry Income		5,250.00	0.0%
<b>Total Conferences &amp; Seminars</b>	<b>\$ 36,425.00</b>	<b>\$ 32,550.00</b>	<b>111.9%</b>
<b>Department Income</b>			
Dept of Christian Education			
Late Vocations	17,250.00	12,000.00	143.8%
<b>Total Dept of Christian Education</b>	<b>\$ 17,250.00</b>	<b>\$ 12,000.00</b>	<b>143.8%</b>
<b>Total Department Income</b>	<b>\$ 17,250.00</b>	<b>\$ 12,000.00</b>	<b>143.8%</b>
<b>Other Contributions</b>	4,200.00		
Dakota Mission District	1,255.00		
Restricted Income - Monastery	10.00		
<b>Total Other Contributions</b>	<b>\$ 5,465.00</b>	<b>\$ 0.00</b>	
<b>Rental Income</b>	2,166.68		
			Desloge, MO rent
<b>Scholarships / Charity</b>			
Other Fundraisers		2,000.00	0.0%
Support our Seminarians Appeal	11,518.00	13,000.00	88.6%
<b>Total Scholarships / Charity</b>	<b>\$ 11,518.00</b>	<b>\$ 15,000.00</b>	<b>76.8%</b>
<b>Uncategorized Income</b>		500.00	0.0%
<b>Total Income</b>	<b>\$ 1,285,974.59</b>	<b>\$ 1,289,730.62</b>	<b>99.7%</b>
<b>Gross Profit</b>	<b>\$ 1,285,974.59</b>	<b>\$ 1,289,730.62</b>	<b>99.7%</b>

Jan + Feb 2024

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
 January - December 2024

	Total			
	Actual	Budget	% of Budget	
<b>Expenses</b>				
<b>Department Expense</b>				
<b>Dept of Christian Education</b>				
Clergy Development and Formation		4,000.00	0.0%	
Continuing Education		3,000.00	0.0%	
Family/Youth Ministry		8,000.00	0.0%	
Late Vocations	8,000.00	12,000.00	66.7%	
Youth Camps	16,898.08	25,000.00	67.6%	scholarships
<b>Total Dept of Christian Education</b>	<b>\$ 24,898.08</b>	<b>\$ 52,000.00</b>	<b>47.9%</b>	
<b>Dept of Liturgical Practice</b>				
Music Ministry	7,412.16	10,000.00	74.1%	
<b>Total Dept of Liturgical Practice</b>	<b>\$ 7,412.16</b>	<b>\$ 10,000.00</b>	<b>74.1%</b>	
<b>Total Department Expense</b>	<b>\$ 32,310.24</b>	<b>\$ 62,000.00</b>	<b>52.1%</b>	
<b>Insurance</b>				
Auto Insurance	1,491.75	2,000.00	74.6%	
Liability	5,500.25	9,000.00	61.1%	
NVM Insurance	9,860.25	4,000.00	246.5%	Desloge, MO
Property		2,000.00	0.0%	
<b>Total Insurance</b>	<b>\$ 16,852.25</b>	<b>\$ 17,000.00</b>	<b>99.1%</b>	
<b>Miscellaneous</b>				
Debts Forgiven	1,448.52			write-off of unpaid invoices for closed parishes
Discretionary Fund - Bishop	501.00	1,200.00	41.8%	hardship pymt
Reconciliation Discrepancies	1,250.00			write-offs
<b>Total Miscellaneous</b>	<b>\$ 5,081.10</b>	<b>\$ 2,200.00</b>	<b>231.0%</b>	
<b>OCA Assessments</b>	438,127.81	442,685.02	99.0%	
<b>Office Expense</b>				
Background Checks		6,500.00	0.0%	
Bank Service Charges	400.21	200.00	200.1%	



**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
January - December 2024

	Total			
	Actual	Budget	% of Budget	
Bank Stripe Fees	1,003.28	700.00	143.3%	
Dues & Subscriptions	32.52	420.00	7.7%	
Licenses & Fees	64.00	250.00	25.6%	
Office Rent	18,000.00	18,000.00	100.0%	
Office Supplies	898.34	3,000.00	29.9%	
Postage and Shipping	197.95	500.00	39.6%	
Printing & Reproduction	562.67			
Psychological Evaluations	1,330.00	4,000.00	33.3%	
Rectory Refurbishment Expense (inactive)	886.37			
Seminarian Apartment		3,000.00	0.0%	
Service Contracts	1,069.89	2,200.00	48.6%	copier lease
Equipment Lease		2,200.00	0.0%	
<b>Total Service Contracts</b>	<b>\$ 1,069.89</b>	<b>\$ 4,400.00</b>	<b>24.3%</b>	
Software Expense	1,779.59			cloud storage, MS Office, Adobe
<b>Total Office Expense</b>	<b>\$ 26,224.82</b>	<b>\$ 40,970.00</b>	<b>64.0%</b>	
<b>Professional Fees</b>				
Accounting	7,215.05	7,500.00	96.2%	
Counseling	120.00	3,000.00	4.0%	
Investment Fund Management Fees	11,294.42	4,500.00	251.0%	
Legal		1,200.00	0.0%	
Payroll Preparation		500.00	0.0%	
Website Support	25,388.96	4,420.00	574.4%	Our Diocese app + website
<b>Total Professional Fees</b>	<b>\$ 44,018.43</b>	<b>\$ 21,120.00</b>	<b>208.4%</b>	
<b>Program Expense</b>				
Charity	1,000.00	1,500.00	66.7%	
Conferences & Seminars	240.00			
Convocations	18,455.20			
Diocesan Assembly	18,860.64	13,500.00	139.7%	

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
 January - December 2024

	Total		
	Actual	Budget	% of Budget
Seminars & Meetings		13,800.00	0.0%
<b>Total Conferences &amp; Seminars</b>	<b>\$ 37,555.84</b>	<b>\$ 27,300.00</b>	<b>137.6%</b>
Hospitality	10,112.75	2,500.00	404.5%
Laity Engagement		4,000.00	0.0%
Mission Grants	21,667.00	60,000.00	36.1%
Seminarian Scholarships	0.00		
Budgeted Portion	50,000.03	50,000.00	100.0%
Fundraisers Portion	23,353.00	13,000.00	179.6%
Other Scholarships		1,000.00	0.0%
<b>Total Seminarian Scholarships</b>	<b>\$ 73,353.03</b>	<b>\$ 64,000.00</b>	<b>114.6%</b>
<b>Total Program Expense</b>	<b>\$ 143,688.62</b>	<b>\$ 159,300.00</b>	<b>90.2%</b>
<b>Repairs and Maintenance</b>			
Labor	566.00		
Repairs	690.00		
Supplies		1,200.00	0.0%
<b>Total Repairs and Maintenance</b>	<b>\$ 1,256.00</b>	<b>\$ 1,200.00</b>	<b>104.7%</b>
<b>Salaries &amp; Wages</b>			
<b>Salaries</b>			big personnel changes in mid-2024
Bishop	92,700.00	92,700.00	100.0%
Bishop's Secretary	23,570.72	21,216.00	111.1%
Bookkeeper	9,420.00	7,416.00	127.0%
Chancellor	56,672.46	33,344.82	170.0%
Kelenik	8,358.00	17,888.00	46.7%
Vice-Chancellor	54,590.04	54,590.00	100.0%
<b>Total Salaries</b>	<b>\$ 245,311.22</b>	<b>\$ 227,154.82</b>	<b>108.0%</b>
<b>Housing Allowance</b>			
Housing Allowance - Bishop	39,999.96	40,000.00	100.0%
Housing Allowance - Chancellor	19,999.98		

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**

January - December 2024

	Total		
	Actual	Budget	% of Budget
<b>Total Housing Allowance</b>	\$ 59,999.94	\$ 40,000.00	150.0%
<b>Benefits</b>			
<b>Health Insurance</b>			
Health Insurance - Bishop		1,000.00	0.0%
Health Insurance - Chancellor	1,759.02		
Health Insurance - Vice Chancellor	20,714.64	10,000.00	207.1%
<b>Total Health Insurance</b>	\$ 22,473.66	\$ 11,000.00	204.3%
<b>Life Insurance</b>			
Life Insurance - Bishop		1,600.00	0.0%
Life Insurance - Diocesan Keyperson (deleted)		1,600.00	0.0%
<b>Total Life Insurance</b>	\$ 0.00	\$ 3,200.00	0.0%
<b>Pension</b>			
Pension - Bishop	18,578.04	18,578.00	100.0%
Pension - Chancellor	10,734.12	4,668.27	229.9%
Pension - Secretary	2,023.69		
Pension- Vice-Chancellor	7,642.56	7,642.60	100.0%
<b>Total Pension</b>	\$ 38,978.41	\$ 30,888.87	126.2%
<b>Workers' Comp</b>	2,143.59	1,000.00	214.4%
<b>Total Benefits</b>	\$ 63,595.66	\$ 46,088.87	138.0%
<b>Payroll Expenses</b>			
<b>FICA Taxes</b>			
FICA Taxes - Bishop	7,091.55	10,155.55	69.8%
FICA Taxes - Bookkeeper	720.63		
FICA Taxes - Chancellor	4,335.44	2,550.88	170.0%
FICA Taxes - Vice-Chancellor	4,176.14	4,176.14	100.0%
<b>Total FICA Taxes</b>	\$ 16,323.76	\$ 16,882.57	96.7%
<b>Total Payroll Expenses</b>	\$ 16,323.76	\$ 16,882.57	96.7%
<b>Total Salaries &amp; Wages</b>	\$ 385,230.58	\$ 330,126.26	116.7%

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
January - December 2024

	Total		
	Actual	Budget	% of Budget
<b>Stipends</b>			
<b>Communications Director</b>	4,944.00	4,944.00	100.0%
<b>Deans</b>			
Chicago	4,944.00	4,326.00	114.3%
Cleveland	4,944.00	4,326.00	114.3%
Indianapolis	4,944.00	4,326.00	114.3%
Kansas City	4,944.00	4,326.00	114.3%
Michigan	4,944.00	4,326.00	114.3%
Minneapolis	4,944.00	4,326.00	114.3%
<b>Total Deans</b>	<b>\$ 29,664.00</b>	<b>\$ 25,956.00</b>	<b>114.3%</b>
<b>Diocesan Secretary</b>	2,842.92	2,843.00	100.0%
<b>Late Vocations Coordinator</b>	13,365.24	13,365.28	100.0%
<b>Mission Development Coordinator</b>	4,999.92	5,000.00	100.0%
<b>Stipends - Pension</b>			
Pension - Chicago	692.16	605.64	114.3%
Pension - Cleveland	692.16	605.64	114.3%
Pension - Communications Director	692.16	692.16	100.0%
Pension - Indianapolis	692.16	605.64	114.3%
Pension - Kansas City	692.16	605.64	114.3%
Pension - Late Vocations Coord.	1,871.17	1,871.14	100.0%
Pension - Michigan	1,384.32	605.64	228.6%
Pension - Minneapolis	692.16	605.64	114.3%
Pension - Secretary	398.04	398.02	100.0%
<b>Total Stipends - Pension</b>	<b>\$ 7,806.49</b>	<b>\$ 6,595.16</b>	<b>118.4%</b>
<b>Supply Priest</b>	28,681.00	6,600.00	434.6%
<b>Treasurer</b>	7,725.00	6,180.00	125.0%
<b>Youth Coordinator</b>	2,843.04	2,843.00	100.0%
<b>Total Stipends</b>	<b>\$ 102,871.61</b>	<b>\$ 74,326.44</b>	<b>138.4%</b>

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
January - December 2024

	Total		
	Actual	Budget	% of Budget
<b>Special Events Exp</b>			
Alaska-Mexico Appeal	1,000.00		
Cemetary Maintenance Expense	0.00		
Tikhvin Icon Anniv Trip	13,686.76		
<b>Total Special Events Exp</b>	<b>\$ 14,686.76</b>	<b>\$ 0.00</b>	
<b>Travel</b>	2,254.48		
Auditors	944.00	2,000.00	47.2%
Automobile Expense	7,634.31	4,000.00	190.9%
Bishop	26,851.80	20,000.00	134.3%
Bishop's Kelenik	2,969.27	2,000.00	148.5%
Chancellor	6,625.73	6,000.00	110.4%
Deans	2,461.80	1,200.00	205.2%
Diocesan/Bishop's Council	6,542.13	24,000.00	27.3%
Late Vocations		500.00	0.0%
Metropolitan Council	1,355.15	1,000.00	135.5%
Secretary	467.68	600.00	77.9%
Vice Chancellor	9,557.80		
<b>Total Travel</b>	<b>\$ 67,664.15</b>	<b>\$ 61,300.00</b>	<b>110.4%</b>
<b>Uncategorized Expenses</b>	15,411.37		
Uncategorized Expense (inactive)		65,753.76	0.0%
<b>Total Uncategorized Expenses</b>	<b>\$ 15,411.37</b>	<b>\$ 65,753.76</b>	<b>23.4%</b>
<b>Utilities</b>			
Electric	49.01		
Internet Service Provider	2,137.03	1,800.00	118.7%
Telephone	2,179.87	4,000.00	54.5%
Water & Sewer	282.25		
<b>Total Utilities</b>	<b>\$ 4,648.16</b>	<b>\$ 5,800.00</b>	<b>80.1%</b>
<b>Total Expenses</b>	<b>\$ 1,298,071.90</b>	<b>\$ 1,283,781.48</b>	<b>101.1%</b>

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**  
 January - December 2024

	Total			% of Budget	
	Actual		Budget		
Net Operating Income	-\$	12,097.31	\$	5,949.14	-203.3%
<b>Other Income</b>					
Gain (Loss) on Sale of Assets					
Long-Term		4,657.64			
Short-Term		2,289.65			
<b>Total Gain (Loss) on Sale of Assets</b>	<b>\$</b>	<b>6,947.29</b>	<b>\$</b>	<b>0.00</b>	
Interest Income		35,685.71			
Interest Income on OCCIF Inv		6,000.00			
MS Investment Income		14,311.85			
Dividend Income		45,345.79			
F/X taxes on investments		883.70			
<b>Total MS Investment Income</b>	<b>\$</b>	<b>60,541.34</b>	<b>\$</b>	<b>0.00</b>	
<b>Total Interest Income</b>	<b>\$</b>	<b>102,227.05</b>	<b>\$</b>	<b>0.00</b>	
Transfers to Investments					
Auto Reserve Trfs			5,000.00	0.0%	
Manintenance Reserve Trfs			5,000.00	0.0%	
<b>Total Transfers to Investments</b>	<b>\$</b>	<b>0.00</b>	<b>\$</b>	<b>10,000.00</b>	<b>0.0%</b>
<b>Total Other Income</b>	<b>\$</b>	<b>109,174.34</b>	<b>\$</b>	<b>10,000.00</b>	<b>1091.7%</b>
<b>Other Expenses</b>					
Bishop's Discretionary Fund (inactive)		-5,000.00			
Depreciation Expense					
Depreciation- Buildings		1,510.16			
Depreciation- Computers		407.68			
Depreciation- Equipment		1,118.28			
Depreciation- Furniture		2,175.82			
Depreciation- LHI		6,954.27			
Depreciation- Vehicles		0.00			

**Diocese of the Midwest**  
**Budget vs. Actuals: Budget\_FY24\_P&L - FY24 P&L**

January - December 2024

	Total		
	Actual	Budget	% of Budget
Total Depreciation Expense	\$ 12,166.21	\$ 0.00	
Interest Expense	110.78		
Other Expense	1,382.64		
Support of Orthodox Youth Conference being held in Chicago		5,000.00	0.0%
Taxes and Licenses (inactive)	271.93		
<b>Total Other Expenses</b>	<b>\$ 8,931.56</b>	<b>\$ 5,000.00</b>	<b>178.6%</b>
<b>Net Other Income</b>	<b>\$ 100,242.78</b>	<b>\$ 5,000.00</b>	<b>2004.9%</b>
<b>Net Income</b>	<b>\$ 88,145.47</b>	<b>\$ 10,949.14</b>	<b>805.0%</b>

**Metropolitan Council Report Spring 2025**  
**Diocesan Council May 22, 2025**

**V. Rev. John Baker**  
**Reader Basil Kochan**

The spring session of the Metropolitan Council met via Zoom on the afternoons of Tuesday, February 25th and Thursday, February 27th. The Tuesday meeting opened at 1:00 p.m. with prayer led by His Beatitude, Metropolitan Tikhon. Archpriest Alessandro Margheritino, Acting Chancellor and Secretary of the Orthodox Church in America then continued through opening procedures. Minutes from the previous meeting were approved.

**Metropolitan's report**

His Beatitude recognized new members to the Council; Archpriest Peter Robichau from the South, Archpriest Andreas Blom and Kevin Duffy, Esq. from the West, and Rebecca Danchenko from Western Pennsylvania. He asked for continued prayers for Archbishop Benjamin as his health issues were continuing as he deals with Parkinson's disease and radiation treatments. That being said, His Eminence is retiring and a replacement will be sought for the discussion and presumed election at the Diocese of the West's assembly at the OCA's 21st All American Council.

His Beatitude then reported on the passing of His Eminence, Archbishop Anastasios of Albania and the extraordinary service which he provided for the faithful there. Bishop Nikodhim represented the OCA at the funeral services. Further, several individual's passings were noted by His Beatitude including two parishioners from St. Nicholas Cathedral in D.C. in the mid-air collision at Reagan International on January 29th of this year.

Metropolitan Tikhon spoke on recent highlights including two seminary visits and three monastic community visits. He shared his joy in celebrating with Archbishop Mark in Philadelphia at St. Stephen's and the consecration of a new church in Colorado Springs. In external affairs, he spoke to the Assembly of Canonical Bishops announcing their conferring in Denver in 2025. A lesser monetary amount than approved by the Metropolitan Council was approved by the Holy Synod for use by the ACB. This was in line with the previous vote of the Metropolitan Council in allowing for adjustments to the amount as designated by the Holy Synod.

His Beatitude participated in the International Religious Freedom Summit in Washington, D.C. accompanied by Fr. Alessandro and Jonathan Pageau, Metropolitan Council member, Archdiocese of Canada. Representing our Church on an international stage, His Beatitude visited Bulgaria, Serbia, and Constantinople. Also joining in at various times of the visit were Bishop Gerasim, Fr. Alessandro, and Fr. Alexander Rentel. Receptions were gracious.

The three major events upcoming are the 100th anniversary of St. Tikhon, the canonization of Matushka Olga, and the All American Council. The 100th anniversary will be highlighted in New York City on April 7th, a concert at St. Tikhon's Monastery/Seminary, All American Council. June will have the first two celebrations of Matushka Olga's canonization with the capstone at AAC. The reflections on "Gathered Together by Christ" are being compiled and reviewed for



discussion at the Council this July. This Council will also mark the 55th anniversary of autocephaly.

### **Acting Chancellor and Secretary report**

Fr. Alessandro Margheritino, Acting Chancellor and Secretary, submitted a very detailed report on the transition from Fr. Alexander Rentel and the work since his departure. He reported on travel in his capacity both with His Beatitude and without him at various times. Additionally, as blessed by His Beatitude, he continues to head up study of workload and space requirements in the chancery and involve members of the Metropolitan Council in said studies.

He spoke to personnel matters, the most relevant as to Fr. Alexander Rentel vacating the Office of Chancellor. ORSMA and SMPAC leadership roles were presented without questions or objections from the Council. For consideration, Fr. Alessandro presented a Statute Amendment proposing that Metropolitan Council members begin their terms on January 1st following their election and serve until December 31st of their third year. This was moved and passed with two members opposed. The amendment will be sent forward to the Committee on Statutes and Canons for consideration at the All-American Council.

### **All American Council**

Protodeacon Peter Ilchuk gave a very detailed report on the status of the 21st All American Council in his capacity as chair. A meeting was held early in the month in Phoenix with many of the local chairs and resort officials to solidify the workings and general logistics for the Council. Questions arose regarding vendor presence that were not aligned with Orthodox teaching. This is resolved. The draft agenda and schedule for the 21st All American Council was unanimously approved.

After presentation on the 22nd All American Council proposal sites, it was recommended by Fr. Alessandro and Pdn. Peter to enter into contract with Hyatt Regency Dallas for the 2028 site. The motion was carried unanimously.

### **Property Committee**

The Westwood property (New York) sale continues to move along at the expected pace. The state and local government milestones are all being met according to projections. Incidentally, proceeds from the sale of the property may not be used in negotiating future property purchases in the Washington, D.C. area for chancery.

A very detailed feasibility study was presented on the chancery in the Washington, D.C. area. Lengthy discussion ensued. Property with a structure was posted on the market that seemed to fit many of the needs of a chancery. A motion carried to empower Metropolitan Tikhon, Fr. Alessandro, and Andrew Smith (Treasurer) to enter into a purchase agreement on the presented property. The motion was carried with three members opposed. The looming renewal of lease renewal for our current property was also discussed. Further work will take place on this issue.

### **Legal report**

The Metropolitan Council moved into executive session to discuss legal matters. After returning from the executive session, the meeting was adjourned with a closing prayer from His Beatitude at 5:11p.m.

### **Thursday, February 27**

The Thursday meeting opened with prayer led by His Beatitude, Metropolitan Tikhon at 1:05 p.m. Archpriest Alessandro Margheritino, Acting Chancellor and Secretary of the Orthodox Church in America then continued through opening procedures. At the conclusion of the opening procedures, His Beatitude announced the appointment of Dr. Tudorie as president of St. Vladimir's Seminary.

### **Internal Audit**

After presentation and discussion, questions were answered and the report of the Auditing Committee was unanimously received.

### **Pension Board**

The Pension Board representatives again gave a thorough and positive report on the current state of the plan. Participation in the plan by eligible candidates has dramatically improved since the discussion in the Holy Synod to fulfill the mandate has taken place. The increase in participation has eliminated the monthly cash transfer from the investment portfolio to fund pensions. There is still a need to discuss pension plan participation with ethnic dioceses in the OCA. The main highlights are straightforward.

Total Plan assets as of December 31, 2023 were \$24,472,025.

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

That is a growth of nearly \$1.9 million dollars or over 7.7% by meeting mandated participation.

### **Pension Committee**

The report of the Metropolitan Council's Pension Committee was also very positive. The Pension Committee cited that there was 6.13% growth in interest from 12/31/16-12/31/24. However, nineteen months of expenses pulled down the value. Again, though, the Plan is on the right track. A resolution about transparency through public release was presented, discussed, and eventually withdrawn.

## **Treasurer's Report**

Treasurer Andrew Smith provided a detailed written report that was accepted unanimously with only Andrew abstaining from the vote. The budget was roughly \$2.46 million with a projected surplus of \$148,000. The Lilly grant for the Office of Pastoral Life is \$1.25 million. This largely accounts for the increase in assets from \$6.36 million in 2023 to \$8.58 million in 2024. On a very positive note, the growth of investments outpaced S & P in 2024.

With the financial status of the OCA and the Diocese of Alaska in mind, Andrew presented a resolution to assist the Diocese with the canonization of Matushka Olga with \$15,000 in aid. The motion passed unanimously.

## **Departments**

### **Human Resources and Ethics**

Lisa Mikhalevsky, committee chair, made a brief presentation on the work of her committee. They are currently in the exploration stage of salary review. They are primarily looking at current staff. However, they will be recommending expansions.

### **Office of Pastoral Life**

Archpriest Nicholas Solak, Chair, presented a report on the progress. First, and foremost, the mission of the OPL is fully aligned with the OCA. Their goal is to support, strengthen, and equip clergy and their families in the OCA. In this development, their focus is on having the right talent (people) in key positions, refining how to work internally (process) being a remote office, and beginning phase of CRM system (technology). In 2025, they secured a \$25k grant from the Hellenic Society of Chicago and a \$75k grant from the Diocese of Eastern Pennsylvania.

Fr. Nicholas highlighted two initiatives involving clergy and clergy wives. Their focus is on relationships, support, mentorship and growth. Every diocese in the OCA participates minus Mexico and Bulgarian. Secondly, a financial health program that focuses on assistance, retirement, and scholarship is moving ahead.

Finally, beyond funding, the entire Church recognizes caring for clergy growth and stability is a necessity and fundamental to the life of the Church.

## **Adjournment**

Prior to a closing prayer, His Beatitude gave us the foretaste of his letter to the Faithful for Great Lent in offering us the value of silence. Wishing us all a blessed Lent, the meeting ended with Metropolitan Tikhon' prayer closing the meeting at 4:38 p.m.

## **SPECIAL MEETING                      Monday, April 28**

A special meeting of the Metropolitan Council was held on Monday, April 28th for the sole purpose of renewing the lease of the current property utilized as Chancery. After brief discussion, the motion to continue the lease for the next three years was passed unanimously.

Further discussions were held regarding candidacy advertising for Metropolitan Council and Pension Board. It was agreed that these candidacies should be announced by the Pre-Conciliar Commission and not the Metropolitan Council so as not to be perceived as potentially self-serving in seeking candidates.

## **FINAL NOTE**

A Special Meeting of the Metropolitan Council has been announced for May 21st for the discussion of the Office of Chancellor of the OCA.

## Department of Education Diocesan Council Report

### Accomplishments so far...

- New Facebook Page and acquired access to an old YouTube Channel formerly hosted by diocesan youth group.
- Preliminary gathering of various resources for catechesis, sunday school, adult education
- Began making contacts of noted invested diocesan individuals in pertinent areas.
- Made all call survey for education resources that was sent out via DOM website
- Began revitalizing the administrative work of St. Macrina's: nailing down workflow and beginning to insure solvency via connecting more intimately St. Macrina's administration with the treasurer of the diocese.

### Goals for the upcoming year...

- Launch new Education department page with resources
- Create and recruit an advisory team for the Department of Education
- Steady St. Macrina's finances and administrative flow and refocus its vision and mission.
- Connect camp leaders via ZOOM for a Camp Leadership Summit to share best practices and troubleshoot challenges
- Connect catechists (clergy & lay) via ZOOM for a Catechist Summit to share best practices, resources, and troubleshoot challenges
- Further identify regional contacts with the aim of hosting regional education summits to bring together church educators to share and equip each other for educational excellence in our diocese.

In Christ,  
Fr Daniel Greeson  
Director of Dept. of Education (DOM-OCA)



### **Department of Christian Service & Humanitarian Aid – Status Update**

The Department of Christian Service & Humanitarian Aid continues to build capacity to support compassionate outreach throughout the Diocese. We finalized our mission and vision statements, which now clearly express our aim to equip parishes for charitable ministry through collaboration, education, and service.

Since inception, we have:

- Initiated outreach to Orthodox nonprofit organizations, beginning with St. Herman House in Cleveland and national leadership at FOCUS North America. Both have expressed enthusiastic support, with FOCUSNA agreeing to introduce us to their Midwest partners and assist in developing parish service training.
- Begun to form a network of Christian Service Ambassadors, starting with nonprofit leaders. Outreach to deans is underway and will be followed up following our Clergy Convocation.
- Launched initial updates to our department website.
- Completed the drafting of a parish self-assessment tool in collaboration with FOCUS. This will be paired with a two-stage training initiative to be piloted in Fall 2025.
  - Our first stage training is a FOCUS-led 1.5 hour virtual training seminar for parish leaders. This seminar will offer parishes training and support on:
    - approaching the people of their city with curiosity,
    - understanding the needs of the wider community, and
    - cultivating a sense of themselves as existing without a wall between them and the wider community.

Looking ahead, we plan to:

- Expand our ambassador network to include parish leaders and volunteers.
- Finalize and post a best-practices library online.
- Finalize planning and recruit participation for the FOCUS-led the second stage training module beginning January 2026. This training will be offered in 5 modules. Our hope is that at least one parish in each deanery participates in this training.

We are grateful for your prayers and support as we continue to move forward establishing this department.

## **Department of Clergy and Clergy Family Life**

### **Report to the Diocesan Council: May 19, 2015**

Three areas of activity are at various stages of progress:

1. Planning local, small-group clergy retreats for 2026

I have identified St Gregory Palamas monastery in Ohio as a promising location for clergy in the Cleveland and Indianapolis deaneries. Fr Jan Cizmar has put me in touch with the abbot, Fr Joseph. We will talk soon to figure out feasibility and details.

I have spoken with clergy in the Minneapolis Deanery, who are helping to find a suitable northern location. Considering the prospect of a separate retreat for the Dakota district.

I also plan to hold a retreat at Holy Dormition Monastery in Michigan for clergy in the Detroit and Chicago deaneries.

2. Coordination with Clergy Wives

I have held two zoom meetings with our Diocesan reps to the OCA Clergy Wives group. They asked for a small amount of funding for two of their own initiatives: Clergy wife gatherings at the deanery level, and care packages for new clergy wives in the Diocese. We also developed an idea for clergy wife breakfasts with Vladyka during his travels, which have been blessed and will be implemented by the new year.

3. Setting up a resource page for clergy

My intention is to compile resources for new clergy (documents, policies, best practices), and for retiring clergy (financial planning help, policies, best practices). I have held one meeting with Nicholas Woog, who has offered his services as a Social Security and Medicare advisor to retiring clergy in the Diocese.

I submitted a funding request to cover the proposed retreats and Clergy Wives' activities in 2026 to the finance committee for their consideration on May 13. Once I know what funding will be approved, I can begin planning in more earnest.

Submitted in XC,

Rev. Jacob N. Van Sickle

Department of Liturgical Practice  
Diocese of the Midwest  
Report to the Diocesan Council  
Thursday, May 22, 2025

The Department of Liturgical Practice gathers under its purview the oversight of a well-established diocesan ministry in the area of church music; the review and expansion of localized training programs for minor orders and other forms of liturgical service; the formation of a new committee to assist the Archbishop in his review of liturgical art and architecture initiatives in the diocese; and the role of clearinghouse for questions in the areas of liturgical rubrics, texts, and translations.

### **1) St Andrew of Crete Music Ministry**

The ministry continues to work actively and intentionally to provide resources, events, and instruction that enrich the musical formation of choir directors, singers, and other leaders of song in our parishes, with the goal of ennobling the celebration of the divine services in a manner worthy of God. The ministry's annual workshop in Dayton, Ohio, is slated for the weekend of September 19 & 20. It is hoped that attendance at this vital event will continue to increase. Additionally, localized and private instruction and mentoring continues to be offered, and parishes are encouraged to avail themselves of this vital resource.

The ministry is also in the process of developing a trimestral outreach newsletter for all leaders and others interested in parish music ministries, as well as a public calendar of events, thus enhancing the visibility of its initiatives by broadening the scope of its communications. Moreover, a survey of choir directors that aims to discern current musical needs across the diocese is in the works, and should be ready to send our mid-summer. Internally, the ministry's educators continue to emphasize development in the technical aspect of their work, focusing on vocal technique and directing.

### **2) Training for Minor Orders & Liturgical Service**

Expanding on the recently established intake and vetting procedures for minor orders in our diocese, the department has sought to identify programs and curricula that could be used to train subdeacons, readers, and indeed even altar servers in the execution of their various forms of liturgical service more broadly. An excellent and remarkably complete curriculum has been prepared by Subdeacon Dimitri Pletz of Holy Trinity Church in Kansas City; additionally, full materials of a similar nature have been made available to the department by Peter & Susanna Tabeling of St Herman Church in Minneapolis, Fr Phillip Dage of SS Peter & Paul Cathedral in Detroit, and fragmentarily by others. Workshops utilizing these materials have been carried out this spring at least in Minneapolis and Detroit. The long-term goal is to replicate the experience across the diocesan landscape in centrally located venues as needed, and work towards a regular rotation.



### **3) Committee on Liturgical Art & Architecture**

As is well known, all initiatives to alter the plant of a church building or its iconographic program must be presented to the diocesan bishop for his approval. In order to assist His Eminence in this task, a new committee is being formed to review these proposals and advise him accordingly. Current members are Fr John Kennerk of Chicago and Fr William Rettig of Fargo; additional nominations are welcome and may be submitted to the departmental email address, [liturgy@domoca.org](mailto:liturgy@domoca.org).

### **4) Liturgical Rubrics, Texts & Translations**

Almost from the moment that the formation of the department was announced, the director has entertained a number of questions on matters great and small related to liturgical order. Questions of this sort are most warmly encouraged, and again, may be submitted via email to [liturgy@domoca.org](mailto:liturgy@domoca.org). These inquiries and answers are being tracked with the goal of providing an enriched informational page in the department's forthcoming web presence that gathers these and other frequently asked questions.

This presence on our diocesan webpage will also include an account of printed texts and supplementary services for pastoral needs, both as approved for use in the Diocese of the Midwest. Here, again, questions on either of these points should be addressed to the director at the department email address, including materials and translations proposed for the approval of the Archbishop.

Respectfully submitted,

Priest Esteban Vázquez  
Director  
Department of Liturgical Practice

**Report on the Chicago Deanery  
for the Annual Diocesan Assembly in Phoenix, AZ, July 14, 2025**

1. The Chicago Deanery is composed of 24 communities: 16 parishes, 3 Missions, and 5 chapels.
2. We presently have 26 priests, 9 retired priests, 15 deacons of which 2 have “transitioned from active liturgical service.”
3. Clergy changes:
  - a. On August 1, 2024, Protodeacon Robert Northrup was released from his attachment to St. Panteleimon parish in Argo/Summit, IL and was attached to St. Joseph parish in Wheaton.
  - b. On January 18, 2025 Deacon Nicholas Denysenko was ordained to the Holy Priesthood and assigned as second priest at Protection of the Virgin parish in Merrillville, IN.
  - c. Deacon David Kenny was released to the OCA’s Bulgarian Episcopate under Archbishop Alexander on December 31, 2024
  - d. At his request Archpriest Joseph Kopka received a blessing to retire effective January 14, 2025
  - e. Archpriest Herman Kincaid was assigned to Holy Trinity Cathedral effective April 8, 2025
  - f. Protodeacon John Coleman in his transition from active service and formerly assigned to St. Joseph parish is now attached effective on May 7, 2025
  - g. Protodeacon Thomas Keith in his transition from active service is now attached to Holy Trinity Cathedral, effective May 7, 2025
4. Holy Dormition Orthodox Mission, comprised of members of the Moldovan Community in greater Chicago has been blessed by Archbishop Daniel to be established. The community, being led by Archpriest Sergiu Prisacaru is very early in the process of establishment.
5. A presentation on Diocesan restructuring and formation of a variety of Diocesan Departments was made by our Vice-Chancellor Fr. Esteban Vasquez. Our Diocesan website is to have a page dedicated to each of the departments.
6. Fr John Segvich and Protinica Michelle Jannakos are trained facilitators for the OCA Office of Pastoral Life's Thriving in Ministry program and are forming peer-learning groups for priests and clergy wives in the Chicago Deanery.
7. Fr. Tom Mueller and Protodeacon George Potym directed the Deanery Winter and Summer Youth camps on February 15-17 and June 28-July 1 with help from lay counselors Helen Metanchuk and Pat Labun. The camps were well attended and featured a variety of activities including: Archery, cross-country skiing, team building exercised and an amateur show with religious education and worship. Youth attending these camps are forming friendships which help them to experience Orthodoxy across parish boundaries.
8. The Deanery celebrated Sunday evening Lenten Vespers on the Sundays of Great Lent, starting on the Sunday of St. Gregory Palamas. We also celebrated the first bridegroom service of Holy Week on Palm Sunday evening at Holy Trinity Cathedral in Chicago. Archbishop Daniel presided at the service and spoke. Participation of clergy was good and services were well attended. Homilies were based on the theme of the “Eight Tempting Thoughts”
9. A Paschal Deanery Clergy family gathering took place on Sunday, May 18 at St. Peter and Paul Church in Burr Ridge. This was a pot-luck affair. 25 adults and children, representing 8 parishes attended.

Respectfully submitted,  
Archpriest Alexander Kuchta, Chicago Dean

**Reports of parish rectors/priests in charge follow:**

**Holy Trinity Cathedral – Chicago – Priest Alexander Koranda**

Holy Trinity Cathedral has a robust liturgical life and is active in ministry. Over the past year we have hosted the National OCA Clergy Retreat, the Fall Session for the Holy Synod, and most recently the 20th Anniversary of the Return of the Tikhvin Icon. We continue to serve the needs of others with a warm meal and other resources every Saturday throughout the year. We continue to serve as a community center for five twelve step programs and for other neighborhood meetings. The Cathedral community continues to preserve, restore, and upgrade the holy and historical site.

**St. Makarios Mission – Hyde Park, IL – Priest Philip Maikkula**

Things continue to grow slowly and steadily at St. Makarios Mission. In the last year we had three weddings and three baptisms. We created a stipend to pay our choir director and allow greater focus on musical excellence. We completed further beautification projects including repairing walls and ceilings, painting, and commissioning and installing new iconography. A new bathroom was also repaired for use. We are expecting 5 new babies before the end of 2025 and are facing the challenge of outgrowing our space.

**St. Matthew Orthodox Church - Green Bay, WI – Priest John Thetford**

Our parish has been doing well numerically, with new record attendances of 160+ at Palm Sunday and then 170+ at Pascha midnight. We received 16 new people during Holy Week and will receive a few more around Pentecost. The increased numbers have also thankfully brought along more income, which we have used for a handful of small projects that we had been needing to do, such as interior painting, new appliances in our kitchen, and a remodel of our upstairs space into an additional hall seating for 50 people plus a new library space. Additionally, we also were able to increase our charitable efforts locally in terms of sponsoring meals at the shelters, and also in terms of financial giving, and look forward to upping that even more in the coming 12 months.

**St. Macrina the Younger Chapel - Waupaca, WI – Priest John Thetford**

Our outreach in central WI continues to see slow but gradual growth, adding a few new regular attendees in the Lenten-Paschal season, and with a baptism of a catechumen scheduled in late May. After receiving a hierarchical blessing in early 2025 to explore relocating out of Dn. Spyridon Roegner's living room by renting space from an existing church, we continue to take our time looking at options in order to make the best choice (there are a lot of little church buildings in this part of rural Wisconsin).

**St. Nicholas of Myra - McHenry, IL – Archpriest Volodymyr Kovalchuk**

Over the past year our parish has continued to serve the Ukrainian diaspora in the Chicago area by providing a spiritual refuge for them in a familiar cultural context. As a result, many young families and others continue to come to our services and participate in the life of the parish. We performed 2 weddings, 5 baptisms, 1 reception into Orthodoxy from heresy, and 2 funerals. Our choir continues to develop its skills and has added 1 tenor and 1 bass member. We have helped several people fulfill court-ordered community service obligations. We have beautified our narthex, nave, and sanctuary and altar with additional icons and furnishings from Ukraine. We installed a simple permanent zvonitsa with 3 bells from Ukraine near the entryway of our church. We progressed further on efforts to get Father Volodymyr's green card, and our finances have been improving a little.

### **Christ the Savior - Chicago, IL – Priest John Kennerk**

We have seen a steady stream of inquirers of the past year. Due to the location of our parish, we also regularly host international visitors. This year we've been especially focused on two projects. This first is the formation a master plan for the parish grounds that include necessary renovations and possible expansions. The second is a thorough review of our administrative practices and parish archives. We continue to offer a full cycle of services to our faithful. We've also continue to offer social outings and an annual pilgrimage to Dormition Monastery.

### **St Joseph - Wheaton, IL – Priest John Segvich**

In 2024 our parish community marked 35 years of proclaiming the Good News of Jesus Christ through worship, fellowship, stewardship, and discipleship in DuPage County. The highlight of our anniversary year was Divine Liturgy and a celebratory pig roast on September 8. Fr Herman Kincaid, our chancellor, joined us for the day. A new parish council was installed early in 2025 and we are tightening our focus on strategic planning for the next phase of parish life. Processes are being put into place to optimize parish operations and administration. Strengthening community life remains a priority. We launched a young adult group earlier this year that has already gathered several times for spiritual formation and fellowship. Similarly focused groups for the men and ladies of the parish are being formed. Notably, we have expanded our Christian service and humanitarian efforts by designating a parish charity of the month. Evangelization of our local community remains a priority and we now have 15 inquirers and catechumens at various stages of preparation for reception into the Church. Finally, we hope to seek Archbishop Daniel's blessing to move forward with a project to continue to beautify the temple in the coming months.

### **St. Nicholas – Joliet, IL – Archpriest Mykola Bodnarchuk**

This past year has been marked by both spiritual growth and community engagement at St. Nicholas Parish. The sacraments administered included 3 baptisms, 7 Chrismations, 7 receptions into the Orthodox Church, and 1 Wedding.

In the area of missions and community outreach, the parish raised \$310 for Thanksgiving meals at Morning Star Mission in Joliet and continued to offer regular Bible Study classes and Young Adult meetings. Our Church School program remained active, complemented by the choir, reader program, and altar server education. Parishioners benefited from access to educational resources in the parish library. To reach more faithful, Divine Liturgy was streamed online, and sermons were additionally recorded in Ukrainian.

Several seasonal and special events enriched parish life: First Confession, a Back-to-School Backpack Blessing, the St. Elijah Car Blessing, the children's St. Nicholas Day pageant performance, and a community Movie Night. High school graduates received the parish's annual scholarship, and parishioners gathered for Mother's Day and Father's Day lunches. We honored our departed loved ones through Memorial Day grave blessings. A joyous Hierarchical Liturgy and Anniversary picnic were celebrated, and our Church School children organized a Spaghetti Lunch Fundraiser, raising \$81 to donate to a local charity of their choosing. Additionally, St. Nicholas joined with sister parishes in Joliet to serve Joint Pre-Sanctified Liturgies during Great Lent, strengthening our unity and shared witness.

In terms of maintenance and improvements, the church replaced its garage door and motor, installed a new air conditioner, and upgraded the church printer. Beautification efforts included planting flowers, cleaning up the church and cemetery grounds, and removing rust and repainting pipes. Liturgical enhancements included new white altar covers and new vestments for the priest. The parish also updated the church audio/visual system and replaced the bell system.

### **Holy Apostles - Bloomington-Normal, Illinois - Priest David Gresham**

We received 11 new converts into the Church since June and currently have 8 catechumens and several serious inquirers. Average Sunday attendance has been increasing by 16% to 20% annually since 2022. The parish has been very active in charity and alms-giving since June supporting the St. Vincent DePaul Food Pantry, Home Sweet Home (homeless help), Birthright of Bloomington, and the Baby Fold (family/children services). After several failed attempts over the years, we finally now have a functioning OCF chapter at Illinois State University, with 12-15 active members meeting weekly, going on retreats, etc. Next up for the parish: multiple upcoming building improvements.

### **St. Elizabeth the New Martyr Orthodox Church - Chesterton, Indiana - Priest Anthony Saunders**

By God's grace, to the best of our ability, the Orthodox liturgical ascetical life remains the center of all our labors here at St. Elizabeth's. It is the axis around which everything at the parish turns, and the sacred culture into which our inquirers are invited to immerse themselves. In the past year the Lord has enabled us to continue to offer the divine services 5-6 days a week, bearing witness as best we can to the supreme importance of the 'one thing needful' - being with the Lord. And this humble labor is bearing fruit. Parishioners are engaging more fully in the life of repentance, Orthodox who move to our area become members of St. Elizabeth's, Orthodox students at Notre Dame drive an hour to make St. Elizabeth's their home, inquirers continue to find our parish, we have candidates who are anticipated to be received into the catechumenate this summer, and the parish's finances are stronger than ever. Every person who comes to Sunday Liturgy is offered a free, home cooked meal in the parish hall. We give thanks to God for the blessing to 'labor and serve' for yet another ye

### **Saints Cyril and Methodius – Milwaukee, WI – Archpriest Elijah Mueller**

Saints Cyril and Methodius in Milwaukee, WI is beginning to see the conversion to the Orthodox faith of people from diverse backgrounds and experiences: single men, single women, and families. In addition to the people with western European ancestry, these newcomers derive from Latino and African-American communities. The religious backgrounds include Pentecostal, Roman Catholic, Seventh Day Adventist, and some Evangelical Protestant churches. Their occupations include firemen, policemen, primary school teacher, and facilities & operations maintenance.

We have a full schedule of services and opportunities for education. We have two weekly Bible studies, one weekly Fathers study, and individual weekly instruction for newly received members who wish to receive further catechesis.

The parish has been recovering from some setbacks with establishment of a nearby ethnic parish that siphoned off many people, a decline during and after the Covid pandemic, and the growing use of English in some of the traditionally more non-Anglophone parishes.

We serve Orthodox students through our university campus chaplaincies by providing weekly vespers, education, spiritual counsel, Confession, and a monthly meal hosted by Mat. Rebecca. We have developed the choir, the director, and chanters through classes offered online and the recruitment of new members. We continue to host the St. Macrina Summer Conference and have developed a parish connection to St Herman's Seminary, through Fr. Elijah and Mat. Rebecca who are now members of the faculty, by sponsoring a showing of the Sacred Alaska movie at a university movie theater, and sending seminarian support monthly.

### **St Maria of Paris Chapels Ministry - Waukesha & Plymouth, WI - Outreach of SS Cyril & Methodius, Milwaukee, WI - Archpriest Thomas Mueller**

These two chapels were established in 2021 to serve present and former parishioners who were distanced from parish life in Milwaukee because of travel, work, or family concerns. While we have experienced slow growth, especially in Waukesha, the focus has been on caring for those who were hanging on to their Orthodox faith and practice with difficulty. We now have three Sunday Liturgies per

month in Waukesha and one in Plymouth, with other services as may be possible. Our liturgical singing is good, our finances stable, and pastoral care is committed and earnest. We observed the 80th anniversary of St Maria (Skobtsova) of Paris' Martyrdom (1945 – 2025) this spring in a little conference in Plymouth. It focused on "her witness to love in her life and death." (I am available to present this conference elsewhere if there is interest.) Our website: [stmariachapels.com](http://stmariachapels.com)

**St. Herman of Alaska Chapel – West Bend, WI, Archpriest Gregory Madlom**

The most important thing I can say is that the faithful have come to trust each other to be willing to share some of the most personal concerns of their lives. We have had several new members and another Chrismation in the next several weeks. And a wedding in the near future. We began renovations of our worship space nine months ago. While not yet completed what has been accomplished has added much beauty to our worship space.

**Holy Resurrection – Palatine, IL – Archpriest Alexander Kuchta**

Since last year, we have continued with our normal liturgical, educational, and charitable efforts. There is an excellent spirit of cooperation in our parish to accomplish parish goals. Among our programs, we have a Church Growth Team which is established to encourage growth in numbers of catechumens and to welcome Orthodox Christians from other areas both near and far. An ongoing effort has to do with improvements to our parish facilities—demolition of the oldest parts of our complex and preparations for construction of a newer educational and social area with a new kitchen, bookstore, library, and restrooms. The main challenge for us is to accommodate the requirements of Cook County Building and Zoning to obtain a permit for work. We remain hopeful for resolution of permit issues that have prevented the start of work on this project.

**Saint Peter and Saint Paul Orthodox Church - Burr Ridge, IL – Priest Daniel Greeson**

This year we had a strong class of catechumens, many of which were received on Lazarus Saturday. We continue to have a strong stream of visitors and inquirers. We now have a strong developing community of young adults, both single and married. We hosted a Canon Law Conference for the OCA in October which was attended by various clergy from all of the dioceses of the OCA. We have also been steadily working on our livestreaming and YouTube channel presence. We have been working on our audio quality, uploading sermons and catechism classes, and of course providing regular streaming services. We continue to increase our subscribers and have regular comments made for how helpful the sermons and classes are. We look forward this year to expanding adult education opportunities, networking with other young adults in nearby parishes, and developing our nascent brotherhood in order to foster Christian fellowship, mentorship, and leadership.

**Holy Theophany Mission – Walworth (Williams Bay), WI – Archpriest John Jones**

Holy Theophany continues to expand its membership and also the number of people who visit us. Note that we are located in a semi-rural area in Walworth WI. Attendance at our Sunday Divine Liturgy now averages around 40-45 people, with 50 or more at times. The age range of adults is expanding from a predominately older population when we became a mission to a greater number of young and "mid-range" adults; hence, we are developing a base of younger members of the community who can serve as leaders in future years.

We have six people who are taking are catechumenate classes. Since last September we have had 2 adult reception and 3 baptisms. We will have a baptism on Saturday May 17 and a wedding on

June 29. There has also been a significant increase in the number of people who inspect our google map info as well as our website.

There is a very strong sense of Christ-like community and mutual support among our parishioners. Participation in our outreach projects continues to be very strong.

**St. Nicholas – Kenosha, WI – Priest Joseph Whittaker**

St Nicholas is continuing on a positive trajectory. We have a new cohort of catechumens, a group of regular inquirers, and new visitors just about every weekend. We have also seen the return of a number of parishioners who had previously removed themselves from the parish community. Most encouraging has been the increase of young families and children that are now invested in the life of the parish. With the increase in children, this calendar year we have begun Sunday-School classes for elementary aged children in the parish. While St Nicholas is on a positive trajectory, there is still a lot of work to be done and room to improve. Moving forward, our parish will need to make progress in establishing a culture of parishioner involvement in the life of the church, stewardship, and community engagement.

**St Panteleimon Orthodox Church - Summit Argo, IL – Priest Estaban Vazquez**

No report received.

**Protection of the Virgin Mary – Merrillville, IN – Priest Jacob Van Sickle**

7 Chrismations, 3 baptisms

Dn Nick (Denysenko) ordained a presbyter and upgraded from attached to assigned to our parish

Reader Philip (Sokolov) attached

Orthodox Clergy Association of Northwest Indiana rebooted with historic Sunday of Orthodoxy Vespers at Sts Peter & Paul Macedonian Church in Crown Point; Fr Jacob elected Vice President of Association  
Hired a part-time parish secretary (new position)

**St. George Cathedral – Chicago, IL – Priest Nikolai Lochmatow**

In 2024, we were greatly honored to receive the Most Holy Mother of God in Her Chicago-Tikhvin Icon. Our cathedral served as the culmination point of the Cross Procession from Holy Trinity Cathedral through the streets of Chicago to Saint George, where His Beatitude Metropolitan Tikhon, along with his brother hierarchs and clergy, served a moleben and enjoyed a festive reception in our parish hall. Our parishioners were delighted to join over two hundred faithful venerating this holy icon in its first visit to Saint George!

Our parish membership is growing, thanks largely due to the current influx of Ukrainian and other Eastern European immigrants. For this reason, we are blessed by His Eminence, our Archbishop Daniel, to observe the feast days according to the Julian calendar, and to use the Church Slavonic language in our services. Our members have Russian, Ukrainian, Belarussian, Serbian, Bulgarian, Polish and Georgian heritage, in addition to local Americans who are drawn to the truth and beauty of the Orthodox faith. We have also gained a part-time deacon, Deacon Nikola Tambur, who lives on the property together with his wife Vera, and children, Sophia and Nicholas. Deacon Nikola functions as Archbishop Daniel's kileynik and is available to travel with him to local parishes. When not traveling, Deacon Nikola beautifies the Divine Services at Saint George in English, Church Slavonic and Serbian.

In 2025, our iconography project continues! We are pleased to report that John Jurewicz has completed the traditional toweling, along with a blossoming vine painted over gold leaf, around the perimeter of our temple. Additionally, our historic Pochaev Icon of the Mother of God is in process of restoration. We were further blessed to receive a reliquary, made here in the Chicago area by Ukrainian refugees, which now contains the relics of Saint Amphilochius of Pochaev, Saint Alexis Toth, and Saint

Tikhon of Zadonsk. God willing, we will continue the beautification of our temple toward the end of this year with the installation of a Pantocrator Icon of Our Lord in the dome, together with eight prophets.

**St. Luke – Palos Hills – Archpriest Paul Jannakos**

1. Adult education every Wednesday night - good response both within and without the parish.
2. Mission charity trips to Florida, North Carolina and Ghana.
- 3 Continued growth with new catechumens. Matushka Kincaid is our catechist.
4. Ministry retreat with Fr Justin Matthewes in January.
5. Women's retreat in April on staying physically and spiritual healthy.
6. Fr Paul celebrated his 40th anniversary of ordination on March 3rd.
7. Installed new etched Icons on windows in the Church.

**St. John of Chicago Chapel – New Lennox, IL – Archpriest Andrew Harrison**

St John Chapel is one of several outreach ministries of St Luke parish We have 38 attendees – 30 adults and 8 children The owners of the church building which we occupy, the New Lenox Area Historical Society, continue to refurbish the church which was built in 1898. Plans include restoring the hall. When completed, these areas will be available for our use. Our ministries include: Chapel Choir – Lynn Betsanes; Director; Greeters – Don Smith, Lead Greeter; Altar Servers – Luke Mattaliano, Lead Altar Server; Readers – Joshua Mattaliano, Lead Reader/Chanter; Prosphoro Bakers – Ashley Mattaliano, Lead Baker

**Highlights since September 2024**

Fr Andrew baptized one infant and two adults, and Chrismated one adult. Thirty people worshiped together at Paschal Liturgy, the largest number so far. Traveled to Streator, IL (where St. John served as pastor) and blessed graves at the Russian Orthodox cemetery and then gathered together for lunch. Parishioners made and served soup during Great Lent. Donations were given for IOCC missions.

**Outreach and Evangelization**

Maintained website at <https://SaintJohnofChicago.com>; Posted photos and videos to our FaceBook page at <https://Facebook.com/stlukeorthodoxchapel>; Attended IOCC mission trip to Erwin, TN to repair home damaged by Hurricane Helene; Ministered to inmates at Indiana State Prison

**Education**

Gave children's sermon and icon class; hosted weekly online Bible Study

**Upcoming Events**

Currently ministering to two adults for upcoming Chrismation and a couple in preparation for their marriage; Installing a stair lift so elderly can attend services





# The Cleveland Deanery

Orthodox Church in America - Diocese of the Midwest

*V. Rev. Nicholas Wyslutsky, Dean*  
Phone: (330) 608-2092    Email: [clevelanddeanery@gmail.com](mailto:clevelanddeanery@gmail.com)

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May 21, 2025

## **Cleveland Deanery Report - May 2025**

Your Eminence, Dear brothers and sisters in Christ,

Christ is Risen! I am happy to report that the Cleveland Deanery continues to meet the challenges and struggles that face the Church and its faithful daily. Thanks to the dedication of our deanery clergy and faithful the deanery continues to thrive and share the message of our Lord Jesus

The Lenten season provided us with the opportunity to gather together in prayer. On the Sunday of the Cross St. Nicholas in Mentor, OH hosted our annual Akathist to the Cross. The service was well attended by many of the faithful. An amazing lenten potluck was prepared by the parishioners. On the feast of St. Patriarch Tikhon the deanery gathered at St. Andrew's Parish in Maple Heights, OH. The service was held both to honor the 100<sup>th</sup> Anniversary of the Repose of St. Tikhon as well as help St. Andrew's. The Presanctified Liturgy was well attended and fellowship was shared at a lenten meal provided by the Parish. The proceeds of the collection were given to the parish to help with its financial needs. On the 5<sup>th</sup> Sunday the deanery hosted the Sacrament of Holy Unction at 2 parishes, Holy Trinity, Parma and St. Nicholas, Mogadore. Both services were well attended by both Deanery and Pan Orthodox clergy and faithful.

With the blessing of Archbishop Daniel a meeting was held to discuss the possibility of St. Nicholas, Mentor OH and St. Innocent, Olmstead Falls, OH coming together to provide support to St. Andrews Parish in Maple Heights to help them find stability and hopefully growth as it moves forward. This unique idea will provide insight and new ideas as to how thriving communities might help those struggling to grow and thrive.

Holy week and Pascha were celebrated in the deanery with much joy. The deanery clergy gathered on the Day of rejoicing for Liturgy and a deanery meeting hosted by Holy Assumption in Canton. It was a joy to gather as brothers to celebrate the Resurrection and to plot the future of the Deanery.

The deanery is planning to gather together on the 25<sup>th</sup> and 26<sup>th</sup> of June to celebrate the feast of the Chicago Tikhvin Icon of the Most Holy Theotokos. Vigil and Divine Liturgy will be hosted by Holy Trinity in Parma OH. Also plans are being made to do the same for the Feast of Patriarch Tikhon in October.

We were blessed with the ordination of two new Deacons in the deanery. Dn. Noah Klembara was ordained at St. Michaels in Broadview Heights and Deacon Matthew Gluntz was ordained at Holy Trinity, Parma. We also wish well to Fr. Emilian Hutnyan as he enters into retirement.

Work continues at St. Theodosius Cathedral, Cleveland to do the work necessary to bring the cathedral building and community to a full recovery from the tragic fire. Under the guidance of Fr. Jan as well as the Parish council much has been accomplished. Through the prayers and support of all the future of the Cathedral is bright.

The work of our Deanery Clergy wives group continues, Plans are in the works for an in person meeting of the group in August. They continue to grow and we look forward to their next gathering in the New Year.

Respectfully Submitted,

*V. Rev. Nicholas Wyslutzky*

V. Rev. Nicholas Wyslutzky, Dean

**Indianapolis Deanery**  
**Fr. Steven Kostoff, Dean**

**St. Thomas the Apostle – Kokomo, IN (Fr. Philip Lashbrook)**

St. Thomas is doing well. We had record attendance for Presanctified Liturgy, Akathist to the Theotokos, and all of Holy Week. We will be bringing three men into the church in a few weeks. We have three people wanting to be in the next catechism class. The clergy just attended the Clergy Convocation.

**St. Stephens – Crawfordsville, IN (Fr. Joel Weir)**

St. Stephens in Crawfordsville continues to thrive and grow. We gained three new catechumens on Myrrhbearers Sunday. Father Joel has been increasingly involved in jail, prison and immigration detention ministry. The parish is thriving not only with a full liturgical life and robust participation, but also in fellowship, notably the very popular soccer league which draws in people from our greater community and runs all Sunday afternoon. Plans for the rest of the year include ramping up the plan for expanding our building (desperately needed) and launching a new adult education/continuing catechism program.

**Christ the Savior/Holy Spirit – Cincinnati, OH (Fr. Steven Kostoff)**

Holy Week and Pascha went well, with great attendance all through the week. The parish continues to attract new inquirers. Our Inquirers Class has over twenty participants, and we now have ten catechumens. We served Vespers for our newly-opened parish dependency in Northern KY, drawing over thirty participants, with another Vespers scheduled for late May. Fr. Steven has retired from his position as an adjunct faculty member of Xavier University's theology department, after teaching for thirty-five years. The parish is preparing to celebrate its 50th anniversary on February 8, 2026. The Summer Bible Study will focus on the Gospel According to St. Mark. Our parishioner, Dr. Scott Kenworthy's new biographical study on St. Tikhon, Patriarch of Moscow, is available by pre-order from Oxford University Press.

**St. John the Forerunner – Indianapolis, IN (Fr. Zachariah Trent)**

We had a fruitful Lenten Season followed by a joyous Pascha. Lent began with Fr. Zachariah having finished radiation therapy a month earlier. Fatigue was an issue through the first Lenten weeks but a couple of weeks before Pascha a burst of energy occurred to carry him through Pascha. The community engaged in what has become a new tradition (two years) with a picnic at a nearby State Park preceded by Agape Vespers. We now turn our attention to preparing for the All-American Council.

**St. Paul the Apostle – Dayton, OH (Fr. Gregory Ealy)**

The theme for St Paul's in Dayton is growth. Since Sunday of the Cross we've averaged 220 on a Sunday for Divine Liturgy. We currently have 28 inquirers and 15 catechumens. Parking is an issue at St Paul's on Sundays and we're currently in initial discussion with the owner of our neighboring property (1.8 acres) to purchase it. If we successfully purchase it, it's likely we will use it to expand our current parking lot, and maybe build a new temple in the future. The very beginning of March we completed our iconostas. Adult education and catechism classes continue as necessary. We have a scheduled visit from His Eminence the first week in November to celebrate our parish's 40th anniversary.

## Kansas City Deanery Report to the Diocesan Council — May 22, 2025

### Priests

1. Fr. Timothy Sawchak, Holy Trinity—Overland Park, KS
2. Fr. Christopher Rowe, Holy Trinity—Overland Park, KS
3. Fr. Michael Kuzara, Joy of All Who Sorrow—Joplin, MO
4. Fr. Basil Ferguson, St. Thomas Church—Springfield, MO
5. Fr. Joel Wilson, Annunciation—St. James, MO
6. Fr. Ephraim Tauck, Theotokos “Unexpected Joy”—Ash Grove, MO
7. Fr. Nicholas Finley, Nativity of the Virgin Mary—Madison, IL
8. Fr. Matthew McDonald, Archangel Michael—St. Louis, MO
9. Fr. Michael Medis, St. Nicholas—Lawrence, KS
10. Fr. Justin Mathews, Holy Trinity—Overland Park, KS
11. Fr. Anthony Roeber, Archangel Michael—St. Louis, MO
12. Fr. Joseph Winsler, St. John of Kronstadt—Lincoln, NE (as of June 1, 2025)

### Deacons

1. Hierodeacon Theodore (Niklasson)
2. Deacon Stephen Brent Beasley, Holy Trinity—Overland Park, KS
3. Deacon James Mullin, Theotokos “Unexpected Joy”—Ash Grove, MO
4. Deacon John Eller, Annunciation—St. James, MO
5. Deacon Justin Hickman, St. Raphael—Quincy, IL

### Retired Clergy

1. Fr. Peter Bodnar
2. Fr. John Pawelchak
3. Fr. John Zabinko
4. Fr. Christopher Philips
5. Fr. James Dank

### Parish Highlights

- **Theotokos “Unexpected Joy”—Ash Grove, MO** (Fr. Ephraim Tauck, Dn. James Mullin)
- **Annunciation—St. James, MO** (Fr. Joel Wilson, Dn. John Eller)
- **Nativity of the Virgin Mary—Madison, IL** (Fr. Nicholas Finley)
- **St. Raphael Mission—Quincy, IL** (Dn. Justin Hickman)
  - The parish is being served by Fr. Nicholas Finley and Fr. Matthew McDonald
  - Fr. Thaddeus Nielsen (retired) was able to serve Holy Week and Pascha
- **Protection of the Virgin Mary—Royalton, IL** (served by Fr. John Pawelchak)
- **St. John of Kronstadt—Lincoln, NE (Fr. James Dank)**
  - Fr. James Dank retired January 1, 2025
  - Fr. Joseph Winsler will be assigned June 1, 2025
  - Fr. Bill Neumann from the Minneapolis Deanery was able to serve for Pascha
- **St. Thomas Church—Springfield, MO** (Fr. Basil Ferguson)
- **Joy of all Who Sorrow—Joplin, MO** (Fr. Michael Kuzara)

- **St. Nicholas Church—Lawrence, KS** (Fr. Michael Medis)
- **Holy Trinity Church—Overland Park, KS** (Fr. Timothy Sawchak, Fr. Christopher Rowe, Fr. Justin Mathews, Dn. Brent Beasley, Dn. James Kallail)
- **Archangel Michael Church—St. Louis, MO** (Fr. Matthew McDonald, Fr. Anthony Roeber)

## Michigan Dean Report May 2025

St. Demetrius Church: This past Christmas season 2024, the Christmas Basket program has adopted 15 families, providing 15 Christmas Baskets of food (a Christmas Meal) for the family and other items. Also providing gifts for the children in the families.

We also provided a Christmas 2024 Karaoke / game night and meal and Pascha 2025 Karaoke / game night and meal for CLUBLIFE, for 50 special needs adults. Our parishioners interact with our special guests with games, singing, and fellowship.

The Alaska Outreach Mission raised \$13,000 to purchase a new Honda Rubicon ATV for Native born Alaskan priest Fr. Ishmael Andrews. He had no transportation vehicle for him and his large family to do his priestly ministry in his village nor provide subsistence transportation (for fishing and hunting) or ice road transportation. He was so amazed and grateful for our gift of outreach. Our AK Mission Outreach provides assistance to our Native Orthodox clergy in AK.

Prison Ministry: We have 18 inmates (2 Orthodox) in the Jackson Correctional Facility that regularly attend weekly prayer services and catechetical instructions. It is an amazing group of individuals who are passionate about learning and practicing the Orthodox Faith and transforming their lives. It is basically a pseudo-monastery for them as they serve their time in confinement. Their new-found faith has inspired their families outside of the prison and many family members have converted to the Orthodox Faith within this past year.

Planned Parenthood in Michigan has closed down their facilities in Jackson, Cadillac, Marquette, and Petosky, and combined the two facilities into one in Ann Arbor. This is due to the freezing / defunding of the Federal money to this demonic-led organization. As part of the sidewalk ministry, we celebrated it's closing with prayers and lots of Holy Water!

Sts. Peter and Paul: Fr. Philip Dage reports everything is moving right along. O.D.O. (Orthodox Detroit Outreach) is serving 90 people every Sunday from their new kitchen and remodeled dining facility. A hairdresser (from St. Mark's) comes and cuts/styles hair for the neighbors. A Credit Repair Class will be offered for the neighbors at the end of May. This class will be offered in Spanish and in English. A Reader's Workshop will be offered. Subdeacon Matthew will conduct a four-session workshop for those interested in seeking to become a tonsured reader.

Holy Transfiguration: Fr. Michael Butler: Reported he Baptized 7, Chrismated 4 on Lazarus Saturday/Palm Sunday. The Crucifixion fresco is early completed. A record number 280

people attended Pascha Services. Protodeacon Jacob received a gramota for his 28 years of service, as he will soon retire.

Hoy Trinity: Fr. John York reported they had a full and festive Lent/Holy Week and Pascha. reincorporated Holy Saturday Liturgy and Holy Thursday Liturgy into Holy Week cycle. They will be celebrating their Feast Day Pentecost with a picnic. They will be starting a homeschool ministry from the parish beginning in the fall.

Holy Ascension: Fr. Joshua Frigerio reported that the plans for the new church has been approved and is seeking loan information, fundraising plans, and choosing a builder. They hope to break ground by next year. Please send donations to them. They have weekly Thursday Vespers service in Hillsdale, MI as an Orthodox outreach to that community. Ryan Porter (Reader Thomas) will be ordained a deacon on their feast day. They received 12 converts on Theophany and 16 converts during Holy week.

St. Mark's: Fr. John Baker reports they completed 254 food baskets, a total of 278 children received Christmas gifts in their Christmas Food and Gift Program. They partnered with St Nicholas Greek Church to use their bigger facility to facilitate the volume of food items and organization. They are active in O.D.O. serving meals on scheduled Sundays. They had 7 baptisms; 3 Chrismations; 27 Catechumens . They are putting a tile floor design by Andrew Gould and new stained glass windows also designed by him, completion by June 2025. Completed landscaping of property. Negotiating to purchase property and house next door to church property.

REPORT OF THE MINNEAPOLIS DEANERY  
To the Diocesan Council of the Midwest Diocese OCA  
Archpriest Paul Wesche, District Dean  
Thursday, May 22 2025

The Minneapolis Deanery welcomes Archpriest Andrew Jarmus. Released from the omophor of Archbishop Alexander of the Bulgarian Archdiocese, he is received by Archbishop Daniel of Chicago into the Diocese of the Midwest. He will assume his new position as Dean of St Mary's Cathedral in Minneapolis on Aug 1. He joins Archpriest Paul Hodge, who was released from the Antiochian Archdiocese and received into the OCA, and into the Diocese of the Midwest by Archbishop Daniel, in early September of 24, to serve as Rector of Holy Trinity in St Paul. And, he joins Priest Peter Ries, who, upon his graduation from St Vladimir's Orthodox Theological Seminary in Crestwood, NY, was appointed Rector of Holy Myrrhbearers in St Cloud in June of 24.

The Dakotas Mission District hosts a District-wide event on August 8 & 9. The Dean of the Minneapolis Deanery will present reflections on St Herman of Alaska and the Holy Virgin Theotokos to those assembled. Vespers and Divine Liturgy concelebrated by the DMD clergy will be the centerpiece of this gathering. Singers from throughout the District will form the choir. The DMD can now receive donations on the diocesan website. Click on the Donate Now button and enter, Dakotas Mission District, and follow the prompts. A newsletter, as one strategy for overcoming isolation and bringing the faithful of the DMD together, was launched last year. It is published quarterly and includes news of events throughout the District. The annual 'synaxis' of DMD clergy was held in Bemidji last September. The synaxis was attended by the District Dean and by our Diocesan Chancellor, Fr Herman.

We continue to seek meaningful ways to support and promote the evangelical and missionary purpose of the clergy and faithful of the DMD.



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## Parish Proportional Giving Policy

### 1. PURPOSE

The purpose of this document is to define the percentage-based parish proportional giving policy for the Diocese of the Midwest (DOM), a diocese of the Orthodox Church in America (OCA). It has been prepared for general distribution with the blessing of His Eminence, Archbishop Daniel of Chicago. This policy has been in effect since January 1, 2019, and was amended for clarity on February 1, 2023. It is further amended here to account for Chancery restructuring effective [May 23, 2025](#).

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### 2. SCOPE

- a. This policy applies to all ecclesiastical entities of the DOM, including but not limited to parishes, missions, and chapels. For the purposes of this policy, except when explicitly noted, where the term “parish” is used, it is intended to apply to the ecclesiastical entities as defined in this paragraph.
- b. This policy addresses a proportional giving plan to financially support the DOM and the OCA.
- c. This policy has been designed to work with the OCA’s financial policies.
- d. The financial obligation of all ecclesiastical entities in the DOM shall be satisfied by compliance with this policy.

### 3. POLICY STATEMENT

- a. Parishes shall remit a percentage of their last complete fiscal accounting year’s Eligible Income in twelve monthly increments to the DOM. For example, parishes shall remit a percentage of their 2024 Eligible Income for 2026. The DOM, in turn, shall remit the appropriate percentage of Diocesan income received from the parishes to the OCA.
- b. Parishes shall complete the Parish Financial Worksheet (FORM 1) and submit it to the Diocesan Chancery Office in Chicago, IL no later than March 31. For example, parishes shall submit FORM 1 [showing their 2024 income](#) by March 31, 2025. Parishes can submit FORM 1 via the Diocesan Reporting Website, located at: <https://reporting.domoca.org/>.
- c. The Parish Rector, Priest-in-Charge, Treasurer and/or Financial Secretary shall calculate their Eligible Income and proportional giving based on the formulae in Section 4.
- d. Parishes that fail to submit their Parish Financial Worksheet in a timely fashion shall remit payment based on the previous year’s rate and be referred to the Diocesan Archbishop for appropriate corrective action.

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#### 4. PROPORTIONAL GIVING PERCENTAGE

The 2018 Diocesan Assembly set the proportional giving percentage at 13% of Eligible Income. [This percentage will remain in effect until further notice.](#)

The **Eligible Income** (implemented in FORM 1) is defined as follows:

Eligible Income = Total Prior Year Gross Income from all sources minus the sum of the following:

- Donor Restricted Contributions (not for normal operations)
- Pass-Through Recorded Income (only if recorded to income)
- Charitable Expenses
- Investment income recorded to respective Restricted Fund (noted above)

(See **Section 5 DEFINITIONS** for a further explanation of these terms).

**NOTE:** Parishes may seek **relief from their financial obligations** on the grounds of financial hardship. Parishes seeking such relief must contact the Diocesan Archbishop as soon as possible with evidence supporting their concerns and a proposed financial recovery plan to achieve 13% of their eligible income for tithing. Starting in 2025 and for future years, parishes shall file their requests for relief by March 31. The Diocesan Archbishop shall request the Diocesan Finance Committee conduct a thorough review and make a recommendation [to the Diocesan Archbishop](#). The Diocesan Archbishop will make the final decision on relief from financial obligations and inform the Diocesan Council. All relief from financial support obligations are valid for one year and shall be put in writing and filed with the Diocesan Chancery. Requests for relief shall be sent to the Diocesan Archbishop via the Diocesan Reporting Website, located at: <https://reporting.domoca.org>.

#### 5. DEFINITIONS

**Gross Income** – All forms of income received by the parish, whether donations or dues, including stocks and bonds valued as of the date of being sold. Other examples include net income from cemetery, fundraising, [bookstore](#), rental activities, [interest from unrestricted sources](#), and all other sources of income such as the proceeds from the sale of property; structure(s) or land. In-kind donations (non-cash) are excluded. Funds received from a loan are not considered to be part of gross income.

**Capital Campaign Contributions** – Contributions to the parish for the acquisition of land or buildings, or the MAJOR restoration (at least 40% of the cost of the asset) of current worship or fellowship facilities. Mortgage payments are excluded (considered to be normal operating expense); however, restricted donations specifically to pay down a mortgage are eligible capital campaign contributions.

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**Commented [A1]:** Capital Campaign Contributions can be included into Donor Restricted Funds. Cap Campaign funds are designated by the donor for a specific purpose (and are not for normal day-to-day operations) and therefore meet the same definition as Donor Restricted Funds.

**Donor Restricted Contributions** – Contributions to the parish for the acquisition of donor specified items (e.g., to beautify the church) and for specific items or activities, including donor contributions for an external charity. Although donated funds may be specified for utilities, repairs, or other operating expenses, these donations are NOT considered Donor Restricted Contributions under this policy.

**Board Directed Fund** – The transfer of funds from general operating resources in support of any restricted fund or project are NOT considered Donor Restricted Contributions under this policy.

**Pass Through Income** – The reception of monies not intended to remain with the parish but are received and held by the parish temporarily and soon disbursed to their intended final destination. Examples of this are some fundraisers, seminarian scholarship campaigns, and other collections for 3<sup>rd</sup> party charities.

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**Charitable Expenses** – Expenses paid out to an external charity over and above any amount collected for the charity. These are monies that come out of operating income.

**Investment Income Recorded to Respective Restricted Fund** – Income received from Stocks or bonds that have already been designated to a specific restricted fund. If an investment is unrestricted in nature, the interest received is considered gross income and is not subject to exemption from the 13% proportional giving. This only applies to any realized income.

**Unrealized Investment Gains** – This phrase refers to an increase in the value of an investment that has yet to be sold for cash. Unrealized investment gains are not considered part of Gross Income for purposes of this policy. An unrealized investment gain becomes realized once the investment is sold for cash. When the investment is sold, the income generated by the sale is considered Gross Income for purposes of this policy and is subject to the Eligible Income analysis in Section 4.

## 6. RESPONSIBILITIES

### a) DOM Diocesan Council

- i. Takes official note of financial issues brought to its attention by the Archbishop, Treasurer, and/or Finance Committee, including archpastoral grants of financial relief.
- ii. Reviews the effect of this policy on Diocesan income and the support of the OCA.
- iii. Initiates revisions to this policy, as needed.

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### b) DOM Finance Committee

- i. Reviews and modifies, as required, proportional giving percentages as the program evolves.

- ii. Prepares a payment proposal to present to the Archbishop, who will make the final decision, for parishes seeking relief from their specific financial obligations.
- iii. Monitors the impact of the program on parishes.

**c) DOM Treasurer**

- i. Coordinates and implements this policy in a consistent manner.
- ii. Supports and trains parish treasurers on this policy.
- iii. Reviews parish financial reports for compliance with this policy.
  - a. Inform the DOM Chancery of parish non-compliance with this policy.
- iv. Remits financial support to the OCA monthly.

**d) DOM Bookkeeper**

- e) Records and monitors the collection of parish financial obligations. DOM Chancery
  - i) Consult with DOM Area Deans on parishes within their deanery of non-compliance.
  - ii) Involve the Diocesan Chancellor if parishes continue to be non-compliant to find a reasonable remedy and/or potential disciplinary measures.

**f) DOM Area Dean**

- i. Confers with parish rectors when financial obligations are not remitted in a timely manner. Works in conjunction with the DOM Treasurer and DOM Chancellor to provide guidance to the parishes on financial compliance matters.

**jj) Parish Rector or Priest in Charge, Treasurer and /or Financial Secretary**

- i. Completes:
  - o The Parish Financial Worksheet (FORM 1)
- ii. If requesting Tithing Relief, the following must be submitted, or the request will not be considered:
  - o Submit the Parish Financial Worksheet (FORM 1).
  - o Submit letter with financial evidence supporting your request for relief.
  - o Submit a proposed financial recovery plan to achieve 13% of your eligible income for tithing.
- iii. Submit all applicable documents to the DOM Treasurer no later than March 31 to the Diocesan Reporting Website, located at: <https://reporting.domoca.org/>.
- iv. Remit the monthly financial obligation to the Diocesan Bookkeeper before the 15<sup>th</sup> day of the month.

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**Commented [A2]:** This is a "money out" activity, and should not be handled by the bookkeeper, who has a strictly "money in" role.

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**Commented [A3]:** Best this be done by the bookkeeper, with Secretary as backup in his absence, as he will be monitoring it and keeping a pulse on who has paid and who hasn't.

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**Commented [A5]:** This will make the terms Net 15. They will have 15 days from issuance date to pay. Some parishes pay an invoice a month later, which is understandable. Parishes should know what their monthly amount to pay is each month, as they receive this information before the new year.

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**FORM 1**  
**Diocese of the Midwest**  
**Parish Financial Assessment Worksheet 2024**  
**Proportional Giving: 13% of Eligible Income**

Parish Name: \_\_\_\_\_ City: \_\_\_\_\_

	Description	FY 2024 Income
Line 1	Gross Income (from all sources) <u>including net income from ministries such as bookstore, cemetery, fundraising, etc. (see section 5 of Proportional Giving Policy)</u>	
	Less:	
Line 2	Donor Restricted Contributions (donor has specified use) <u>including Capital Campaign contributions, major facility repair contributions, plus Investment income recorded into the Restricted Fund</u>	
Line 3	Pass-Through amount recorded for convenience of parishioners and not intended for Parish expenses (only if recorded in Gross Income)	
Line 4	<b>Total Adjustments to Income (Lines 2 through 3) Calculation</b>	
Line 5	<b>Net Operating Income (Line 1 less Line 4) Calculation</b>	
	Less:	
Line 6	Charitable Expenses over and above donor contributions	
Line 7	<b>Eligible Income for Assessment Calculation</b>	
Line 8	Parish requests assessment relief due to hardship. (Circle Yes or No)	Yes / No
Line 9	If YES, submit this FORM 1 with a letter providing <b>financial evidence supporting your request for relief and a proposed financial recovery plan</b> to the Diocesan <u>Chancery Office</u> . See Section 6.f.	

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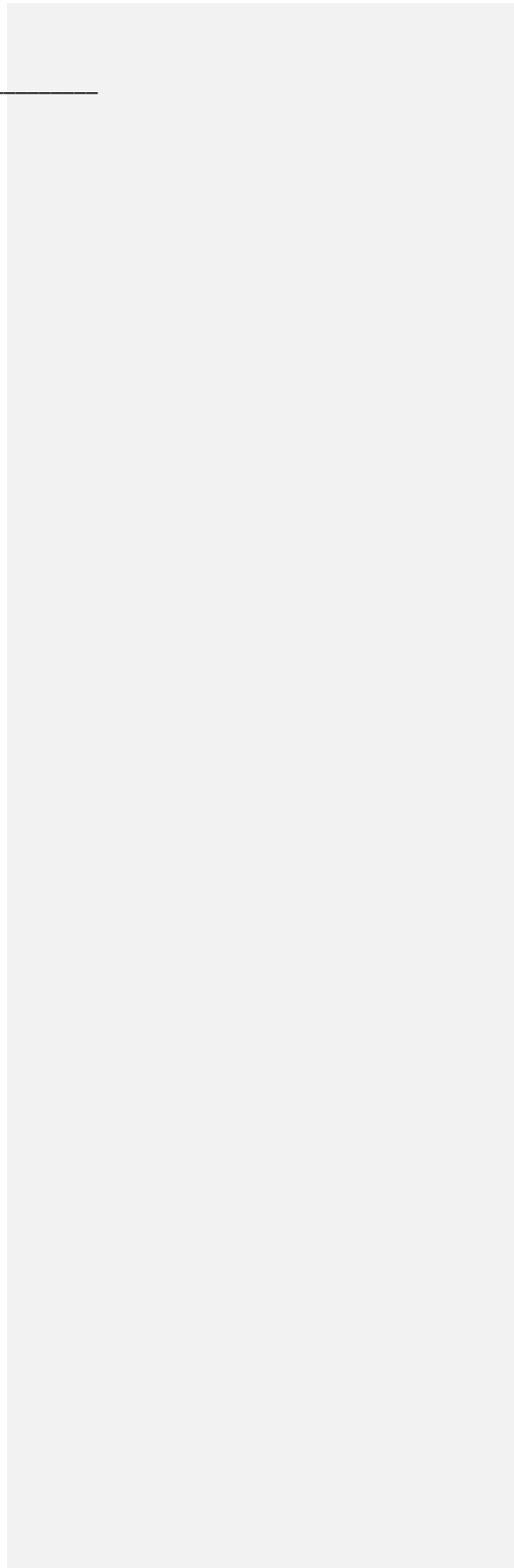
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Parish Rector or Priest-in-Charge  
Signature

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Date

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Parish Treasurer  
Signature

\_\_\_\_\_  
Date

**SUBMIT DOCUMENT(S) VIA THE DIOCESAN REPORTING WEBSITE, LOCATED AT:  
<https://reporting.domoca.org/>**



## **2025 Diocesan Assembly – Proposed Appointments & Committees**

### **Presidium (Statute IX.11, Bylaws V.5.1-2)**

Archbishop Daniel, Presiding Officer

Archpriest Herman Kincaid, Appointed Meeting Runner

Priest Esteban Vázquez, Clergy Vice-Chair (Nominating Committee Lead)

Dr Angela Zekios, Lay Vice-Chair (Credentials Committee Lead)

### **Secretariat (3; Statute IX.12-13, Bylaws V.E3: Secretary+2)**

Priest Nikolai Lochmatow (Diocesan Secretary)

Two delegates chosen from registrants

### **Credentials Committee (2 needed; Statute IX.8, no specifications)**

Dr Angela Zekios

One delegate chosen from registrants

### **Nominating Committee (3; Bylaws V.I.1, IV.D)**

Priest Esteban Vázquez

Two delegates chosen from registrants

### **Board of Tellers**

All deacons present