

# Delegate Handbook

## Volume 3

Ver July 15th, 2022

# Department, Institution, and Financial Reports



**Diocese of the West  
Orthodox Church in America  
2022 Diocesan Assembly  
July 20<sup>th</sup>, 2022**

**Meeting Held in Conjunction With**

**The 20<sup>th</sup> All American Council  
Hilton Baltimore Inner Harbor Hotel  
Baltimore, MD**

Ver July 15<sup>th</sup>, 2022

This is an updated version of this document

## Table of Contents Volume 3

### DEPARTMENT REPORTS

Charity Department.....	*
Communications Department .....	*
Education .....	4
Diaconal Vocations.....	5
Liturgical Music Department.....	*
Metropolitan Council.....	6
Youth Ministry.....	*

### INSTITUTION REPORTS

Monastery of St. John of Shanghai and San Francisco.....	9
Protection of the Holy Virgin Monastery .....	*
Our Lady of Kazan Skete.....	*
St. Barbara Monastery .....	*
Holy Assumption Monastery .....	11
St Peter Monastery .....	*
St John the Baptist Monastery .....	14
The Church of the Synaxis of the Holy Theotokos.....	*
St Peter the Aleut (Lake Havasu City Property).....	*
Parish Growth Over Past Five Years .....	*
Parish Financial Life Reports.....	*
Home of Mercy .....	15

\*No written reports this year.

# EDUCATION

Any number of excellent educational materials are available for use via TOCA, OCEC, and other canonical jurisdiction websites, thus it is redundant and presumptuous for this department to create more curriculum and ways to structure a parish education program.

That being said, it cannot be overstated that ***an educator's personal spiritual growth and organic participation in the Church's life is the single most critical factor in passing on the Orthodox faith to our youth and children.*** Even the best religious education curriculum remains "dead" if it is not incarnated in the life and experience of the educator... If a teacher is instructing a class on the significance of the Baptism of Christ, but is not present at the feast of Theophany, for example, the teaching is near all for naught (c.f. "what thank have ye, even sinners to the same" i.e. passing on mere information)! Parish educators are exhorted to first instruct by example, deed, and participation, then to give word "to that which we have seen and heard" (I Jn. 1:3), lest our Holy Orthodox faith be reduced to mere data points that children can get at any "church" in town, often in a much more entertaining format.

We must strive to lead our children, youth, and catechumens into ***participation*** in the life of Christ and the Church. This is the beauty and depth of what the Church offers the world.... our children can find Bible stories elsewhere, but no where else can they participate in the events of the Scriptures, and come to know the Saints as extended family in Christ. Parish educators, vested fully in the sacramental and liturgical life of the Church, pass on our Living Water, not merely information.

***Yet more essential is that parents take responsibility to lead their children*** in religious education and participation. A teacher can encourage, exhort, explain, and themselves participate in the Church's life before their students... but a teacher is rarely in a position to bring their students to a Feast or event of the Church (though this is always an option!). For this reason, religious education is ultimately effective when it takes place in the context of the family. This does not mean that traditional Sunday School classes should be eliminated, but that ***parents are to be encouraged and empowered to see themselves as the primary religious educators of their children.***

There is an ever growing amount of quality Orthodox children's books on the market. These ought be readily available to families via parish bookstores, given as gifts to children in the parish, etc..... By empowering parents to educate their children, the parents themselves are educated!

- a goal of this department is to encourage and exhort educators and parents to an ever fuller participation in the life of the Church.
- a second goal is to encourage purchasing and reading of the ever-growing amount of quality children's books on Orthodoxy.

Archpriest Anthony Karbo

**Diaconal Vocations Program**  
**Report to the Diocesan Assembly of the Diocese of the West**  
**Archpriest Kirill Sokolov, Director**  
**July 1, 2022**

The Diaconal Vocations Program of the Orthodox Church in America continues to prepare men through a process of academic training, spiritual preparation, and practical liturgical training. We are blessed that under the leadership of His Eminence, Archbishop Benjamin, candidates in the Diaconal Vocations process are guided by a “team” that includes the Hierarchs, Deans, the parish priests as primary mentors, and experienced deacons.

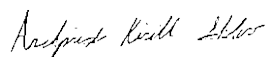
At this time, there are twelve registered participants from the Diocese of the West in the Diaconal Vocations Program of the Orthodox Church in America (OCA); about five of those are actively working on their programs. We are grateful to God for the ordinations of several of our “graduates” in the last few years.

It was very exciting to host the 2019 and 2021 churchwide Diaconal Liturgical Practicums in the Diocese of the West. In 2022, the Practicum returned to the campus of St. Vladimir’s Orthodox Theological Seminary. Next year’s location is to be determined. One beautiful result of hosting the Practicum at the Santa Rosa St. Seraphim Cathedral / Protection Parish was receiving the blessing of His Eminence, Archbishop Kyrill and the participation of students and deacons from the Diocese of Western America, Russian Orthodox Church Outside of Russia. We pray that this collaboration on a local level may continue and grow with God’s help.

Calling a deacon out of the midst of our parishes is a responsibility that requires discernment, prayer, and extra work for any parish priest and support from the entire parish community. Having recently lost our cathedral parish deacon to relocation, I know and am experiencing that it is not necessarily easy to find a man – usually a busy husband and father – who is suited to this calling to then encourage in this project. I am always very happy to have a conversation about the process and the blessings and pitfalls that, experience shows, might lie ahead for anyone pursuing diaconal ministry. May God strengthen us all as we seek to build up the diaconate in Christ!

At the present time, due to my responsibilities with the churchwide Diaconal Vocations Program, most of the resources a potential candidate will need to start with can be accessed directly at [oca.org/dvp](http://oca.org/dvp). Thank you for the opportunity to serve in this ministry at both the churchwide and diocesan level. Again, I am happy for any questions or suggestions.

Respectfully submitted, in Christ,



Archpriest Kirill Sokolov, Ed.D.  
Director, Diaconal and Late Vocations Programs  
Orthodox Church in America  
[dvp@oca.org](mailto:dvp@oca.org); <http://www.oca.org/dvp>

## METROPOLITAN COUNCIL REPORT

### SPRING SPECIAL MEETING 2

The second special Spring meeting was a Zoom meeting on June 27, 2022. In attendance were Diocesan Clergy member, Fr. Michael Anderson, Diocesan lay member David Lane, and members at-large Fr. Kirill Sokolov and Lynnell Brunswig.

**Metropolitan Report:** His Beatitude reported on the passing of Archbishop Paul and the funeral services at which he presided.

He briefly discussed the issuance of the Dobbs decision by the Supreme Court and he will be preparing a message regarding it which will be available.

He discussed the progress toward the relocation of the chancery, the chancellor and the secretary. He has rented a home in Falls Church VA, effective June 2 and moved into the residence on June 15. This is a very good location as he is within 15 -25 minutes to two airports and the majority of his parishes. He is also approximately 15 minutes from the proposed chancery office.

He is recommending the proposed chancery office.

**Meeting Resolution:** The New York law regarding remote, online meetings has been changed so a resolution was adopted which authorized His Beatitude or his agent to call for and notice a solely online meeting.

**Chancery Lease:** The Secretary reported on the proposed three year lease commencing July 1, 2022 for the new temporary chancery in VA. There was substantial discussion regarding it, the cost was within the budget, and the lease was approved with a vote of 23 affirmative and 5 negative.

**Archive agreement:** The secretary reported on the negotiations and proposed agreement with SVOTS for the transfer of the archives to SVOTS. The agreement keeps the ownership of the archives with the OCA who continues to have access to it while putting the archives in a protective environment for their preservation.

There was a letter from the Chancellor to SVOTS regarding the transfer of two restricted funds for (1) the construction of a building for the archives and (2) the digital conversion.

There was substantial discussion regarding these and they were approved unanimously.

**Pension Plan report:** The Metropolitan Council had previously authorized the employment of the Cheiron pension plan company to audit the OCA Pension Plan and the report from the Milliman Company, the long-term company for the Plan. An extensive report was presented by them, both with an executive summary and a verbal report. The written reports are available online.

The primary conclusions were that the January 2021 report from Milliman was deficit in many particulars among them being: (1) it did not report on the plan risks, (2) minimized the report that the plan was only funded to 48.8%, (3) did not explain that the 76% claimed funding was the future projection which meant that the plan, if the assumptions were correct, would never be fully funded, (4) the projections were based upon a 7% annual investment return whereas the 10 year average

return was 4.75%, (5) the plan has an actual negative 6% between the contributions and current retirement payouts (which would mean that even if the 7% was accurate, there would only be a net 1% increase, (6) the assumed administrative expense of 1.5% ignored the actual administrative expense of 2%. All of which meant that the Milliman report did not discuss the negative aspects, overstated the assumptions to present an improper projection and picture of the plan's vitality, and did not accurately portray the vitality of the plan which prevents immediate steps which are needed to preserve it.

The end result is that the plan is in serious danger but that it can be saved.

The Metropolitan Council adopted the following resolution which was presented to the Holy Synod as follows:

*The Metropolitan Council, meeting today under the presidency of His Beatitude Metropolitan Tikhon, resolved the following:*

The Metropolitan Council offers its gratitude to Andrew Smith and the members of the Metropolitan Council Pension subcommittee that worked for many hours on addressing the concerns raised by the bishops and dioceses of the Church, and recommended that an external pension audit be performed.

The Metropolitan Council receives with gratitude the requested external audit report and supporting documentation which were provided by Cheiron, Inc, and accepts their careful analysis and recommendations.

The Metropolitan Council has reviewed and recommends that the following action plan be implemented:

1. The report and supporting documentation will be forwarded to the Holy Synod, the Chancellors, and the Treasurers of all the Dioceses of the Orthodox Church in America with a request for support and collaboration from the Holy Synod.
2. That the report and supporting documentation also be provided to the OCA Pension Plan Board and that further collaboration occur.
3. The Metropolitan Council recommends to the Holy Synod and their Dioceses that improvements to the administration of the Pension Plan be implemented:
  - a. That the Pension Plan Board report at each semi-annual meeting of the Metropolitan Council and that comprehensive data and reporting be routinely shared to include all future performance, perceived risks, participation, and funding by providing the requested information not limited to but including assets, liabilities, actuarial funding ratio, market value funding ratio, surplus / deficit, and plan participation.
  - b. That the capability of the Pension Plan Board be ensured by participation of qualified members with subject matter expertise.
  - c. That the Church obtain a new actuarial firm and Plan legal counsel to increase

confidence in the guidance received, and that consultants are regularly evaluated to ensure optimum Plan performance.

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The second part of the special Spring meeting was a Zoom meeting on July 13, 2022. In attendance were Diocesan Clergy member, Fr. Michael Anderson, Diocesan lay member David Lane, and members at-large Fr. Kirill Sokolov and Lynnell Brunswig.

**METROPOLITAN Report:** His Beatitude mentioned that he was settled into his new residence and busy preparing for the AAC. He pointed out that the matters to be discussed were important to be presented at the AAC for the benefit of all of the church.

**Property Committee Report:** The Property committee proposed a resolution modifying the prior authorization for \$40,000 to hire experts to explore matters regarding the sale of the chancery property. The prior resolution had specified specific expenditures for the money and the facts had been obtained without spending the money. An offer had been received for the purchase of the property for \$5,500,000 upon conditions including a rent for perhaps three years while the prospective purchaser clarified some issues with the assessed valuation/property taxes. These conditions needed to be explored to determine the effect that it would have on the OCA. The resolution was approved providing that the funds could be used for attorneys or other experts.

**Treasurer's Report:** The treasurer presented the proposed funding resolution to be presented for adoption at the AAC. There was significant discussion regarding it and it was adopted.

There was a proposal to present a resolution requiring that each diocese remit an additional 2% with the funds earmarked and restricted to support the OCA Pension Plan's administrative costs. The intent of the resolution was to make progress in systemically resolving the challenges facing our Pension Plan, since funding resolutions can only be adopted at the level of the triennial All-American Council. The resolution was not moved forward on a narrow vote.

**Pension Plan:** There was an extended discussion regarding the plan, the Pension Board's communications regarding the proposed Statute Amendment, and different methods of preserving the Plan. It was reported that there would be a meeting with the Subcommittee, Finance Committee, Metropolitan, Chancellor, Secretary, and the Pension Board on July 14. It was noted that requests for such a meeting had been made to the Pension Board on June 28. However, no response was received until July 11 so it was not possible to have meeting prior to the MC meeting. There was hopes that the meeting would be productive and lead toward a resolution.

Respectfully submitted,

For the DOW members of the Metropolitan Council  
David Lane, DOW lay member

**The Monastery of St. John**  
of Shanghai and San Francisco  
Orthodox Church in America, Diocese of the West



**Diocesan Report for 2021-2022**

The Brotherhood of St John of Shanghai is grateful for the continued prayer and financial support of the diocese and many other faithful friends. We continue to celebrate the monastic cycle of services, as well as the Divine Liturgy several times in the week. The brothers continue their efforts to improve our monastery facility and offer hospitality to the visitors, as well as laboring in our industries to support ourselves by the work of our own hands.

Projects of the last year included the completion of the repairs of a two decks and continued wildfire prevention efforts, including weed abatement, and the felling of trees to establish a fire break around the chapel and guesthouse.

Over the past year, we hosted groups of parishioners from Elevation of the Holy Cross (Sacramento), Archangel Gabriel Mission (Ashland, OR), and Ss Cyril and Methodius Mission (Chico, CA). These were joyous weekends of worship, spiritual instruction, fellowship, and work projects. We also hosted various other pilgrims, including the youth choir of the local St Andrew Anglican Academy as well as the 50+ Club of the local Roman Catholic parish of St Joseph.

In February of this year, Hieromonk Andrew (Letten), a member of our brotherhood reposed. We were able to attend his funeral at Annunciation in Milwaukie, OR. May he inherit Paradise.

Due to the increasing demands of work, we hired two monastery workers in 2022. One assists half-time with beeswax candle production and the other with tree falling, brush-clearing, fire-prevention and general maintenance. It has helped immeasurably to have more people on staff to help manage our large facility and important industries.

In June of this year, once again, we hosted the Orthodox LIFE School—a week long retreat for Orthodox young adults. This year, we had 12 participants. Several Orthodox speakers came to give talks and answer questions on the spiritual life following the theme of “Being in the world, but not of the world”. It was a positive experience and all participants left edified and encouraged.

Our brotherhood currently consists of 5 monastics. Igumen Innocent (Superior), Monk John, and Novice Jason reside at St John's, while Hieromonk Photios and R-Monk Valentine reside in Cape Coral, FL and Atherton, CA, respectively, for health reasons.

In the coming year, with God's help, we expect to invite more parishes and volunteers to assist on various projects. We plan to continue treating the decks attached to several of our buildings. We will endeavor host a young adult retreat over a weekend in December as well as the Orthodox LIFE School for the same age category for a week in June.

The Brotherhood continues to support itself by producing and selling beeswax candles, running a bookstore (on location and online), publishing Orthodox literature through Divine Ascent Press, and offering hospitality to visiting pilgrims.

Respectfully submitted,

Igumen Innocent, Superior

**Monastery of St John, Manton, CA; Diocese of the West, OCA  
Summary Financial Report, 1 August 2021 through 30 June 2022**

Balance Forward:	<b>\$76,556.37</b>
Income	
Donations:	\$71,198.81
Candle Sales:	\$135,525.56
Bookstore Sales Revenue:	\$9,172.91
Shipping Income:	\$17,065.73
Divine Ascent Press:	\$19,968.22
Divine Ascent Audio/Visual:	\$1,416.14
Total Customer Discounts:	\$(9,616.12)
Other Income:	\$750.00
Total Income:	<b>\$245,481.25</b>
Expenses	
Operations, Insurance, Household, Utilities, Mortgage, and Business Expenses:	<b>\$266,396.59</b>
Net Income:	<b>\$(20,915.34)</b>
Final Balance:	<b>\$55,641.03</b>

## **Holy Assumption Monastery, Calistoga – Annual Report for 2021-2022**

Currently living at the monastery are Abbess Melania; Stavrophor nuns Tabitha, Macrina, Monica, Angelina, and Ioanna; Ryassaphor nuns Marie, Hannah, and Theodosia; and Laywomen Isidora and Gwyn.

We have raised over \$700,000 towards the new St. Nicholas House (total cost is now closer to \$1.3 million than the original \$1 million, due to rising costs). Demolition of the old St. Nicholas House is planned to begin in mid-July. If all goes well, the project should be complete in the summer of 2023. Although we are still in the process of securing a loan for the remainder of the building costs, we followed the advice of our contractor to take advantage of the current stabilization of material costs and begin work now. We will continue fundraising to cover the remaining cost and pay back the loan.

COVID restrictions have lightened considerably, but we continue to livestream our services, for those who find them helpful. Our monthly Zoom meetings continue to bring encouraging feedback. Mother Melania has given several in-person retreats this year. She also continues to teach online Christian education courses with the Classical Resource Learning Center.

Our financial situation is strong due to the combination of our various ventures (e.g. gift store, children's books, chalice wine, and caskets) and support from faithful friends. The sisters remain healthy. Our relationship with our Calistoga neighbors and the larger Orthodox community remains good. We are grateful to all our friends and to God, Who continues to bless us in these challenging days.

**Holy Assumption Monastery**  
**Profit & Loss by Class**  
 August 2021 through June 2022

5:35 PM  
 07/14/22  
 Accrual Basis

	Operating	SNH & Outbldg Renovations (Restricted)	Restricted - Other (Restricted)	Total Restricted	Unclassified	TOTAL
Ordinary Income/Expense						
Income	329,672.14	188,307.98	55,750.60	244,058.58	1,244.79	574,975.51
Cost of Goods Sold	46,348.33	0.00	0.00	0.00	0.00	46,348.33
Gross Profit	283,323.81	188,307.98	55,750.60	244,058.58	1,244.79	528,627.18
Expense	282,897.87	41,422.97	7,357.81	48,780.78	715.59	312,394.24
Net Ordinary Income	20,425.94	146,885.01	48,392.79	195,277.80	529.20	216,232.94
Other Income/Expense						
Other Expense	9,061.07	0.00	0.00	0.00	0.00	9,061.07
66800 - Government Taxes & Fees	9,061.07	0.00	0.00	0.00	0.00	9,061.07
Total Other Expense	-9,061.07	0.00	0.00	0.00	0.00	-9,061.07
Net Income	11,364.87	146,885.01	48,392.79	195,277.80	529.20	207,171.87

**Holy Assumption Monastery**  
**Summary Balance Sheet**  
 As of June 30, 2022

	Jun 30, 22
<b>ASSETS</b>	
<b>Current Assets</b>	
Checking/Savings	759,957.25
Accounts Receivable	4,577.18
Other Current Assets	5,164.33
<b>Total Current Assets</b>	769,698.76
<b>Fixed Assets</b>	375,241.80
<b>TOTAL ASSETS</b>	<b>1,144,940.56</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Other Current Liabilities	1,578.02
<b>Total Current Liabilities</b>	1,578.02
<b>Total Liabilities</b>	1,578.02
<b>Equity</b>	1,143,362.54
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>1,144,940.56</b>

# The Orthodox Monastery of St. John the Baptist

stjohnthebaptistaz.org | sjb.brotherhood@gmail.com | (520) 200-7322

## Diocesan Report for 2021–2022

With thanksgiving to God, we respectfully submit this report regarding the past year of life in our monastery for the 2022 diocesan assembly. By God’s mercy and grace our monastery has been blessed during the past year. We were able to continue our daily cycle of services including the Midnight Office, Matins, or 3rd Hour, 6th Hour, & Typica, on Monday–Thursday; Vespers or Compline on Sunday–Thursday; Vigil Saturday; and Divine Liturgy on Sundays and feast days. We persisted in daily intercession for those suffering and in need due to the pandemic, war in Ukraine, and other trials befalling our country and world.

We continue to sell a wide selection of icons, prayer ropes, and other items through online channels to bring income and hopefully bless those who purchase and pray with these items. In recent months we purchased new equipment and tools which will help us expand our production capacity and add new products to our catalog.

Our monastery currently consists of eight monks: Monk-Superior Macarius, Monk Zephaniah, Monk Paul, Monk Moses, Monk Cyril, Monk Stephen, Hieromonk Michel, and Monk Silouan, along with two postulants. There are a few others as well who are prayerfully considering pursuing the monastic life in our monastery.

In the coming year we look forward to further growth in the work of intercession as our world is in such great need for the cries of our suffering brothers and sisters to be lifted up to our merciful Lord. We are also hard at work in learning new skills in order to increase our income so that we can raise the funds necessary for the construction of the permanent home for our monastery as we continue to live in temporary dwellings for the time being.

### Summary Financial Report:

Balance forward (w/ building fund): \$201,895.10

Income: \$194,632.60

Expenses: \$64,684.69

Final balance: \$331,843.01

Respectfully submitted,

Hieromonk Michel

2022 DOW Assembly

**The Russian Women's  
Home of Mercy of the Holy Virgin's Protection  
2040 Anza St, San Francisco, CA 94118**

Report to the Assembly of the Diocese of the West  
July 1, 2022

The Home of Mercy of the Holy Virgin's Protection is the eldest charitable institution of the Diocese of the West, established in 1936 by San Francisco Orthodox Christians. In the late nineties, the non-profit sold its "Home" due to challenges in San Francisco real estate law. Working closely with the Diocese, under the direction of the Hierarch and Chancellor, the Home helped Diocesan institutions and parishes with the proceeds of that sale, with the goal of purchasing a new Home to continue its mission after a time. In 2000, the Home resolved to provide financial support to the diocese' effort to acquire Wellspring with a check of \$600,000. Subsequently, investment in that retreat center continued, and individual clergy and other institutions were supported.

In 2021, a revitalized Board of Directors desired to continue the Home's Mission to directly provide housing. With increases in capital from stock market gains, it seemed possible to act for a brief moment. With the support of the Archbishop, a goal was to have a property conveniently located near a church so that elderly clergy, widows, etc. might have access to divine services and community. An opportunity emerged to privately purchase a 2.5 acre property immediately adjacent to the Santa Rosa St. Seraphim Cathedral. The Home was able to act on this excellently maintained, updated home, with a purchase price of approximately 1.2 million dollars, with an advance from the Diocese of \$350,000.

At the current moment, the property in Santa Rosa is being rented on the private market to build back reserves while we await potential mission-driven clients to move in. In fact, His Eminence has expressed an interest in locating at the Home following retirement in God's time. The Home is currently repaying the advance from its Diocese at an amount of \$1,000/month while awaiting the appropriate moment to reconsider a more permanent arrangement depending on move-in dates, etc.

We are very grateful to His Eminence, Archbishop Benjamin for his support and guidance as we navigated a time-sensitive opportunity to revitalize this Diocesan Institution which operates as an independent 501c3 non-profit non-profit. The current board includes Archpriest Philip Halliwell, President; Archpriest Lawrence Margitich, Vice-President; Archpriest Kirill Sokolov, Corporate Secretary; Johann Morse; Susan Dechant. We would love to be introduced to interested persons, particularly those with financial or property acumen, that may like to explore working with our board.

If you yourself, or someone you love, particularly clergy and clergy widows, will someday be in need of housing and would like to consider working with the Home of Mercy, please reach out to a board member. We could expand our mission with your gift or bequest – we have 2.5 acres of room to dream! Your prayers and interest are cherished and appreciated.

Respectfully Submitted,



Archpriest Philip Halliwell  
President, Home of Mercy of the Holy Virgin's Protection

Statement of Accounts

\$145,264.71	Fidelity
\$10,979.18	Bank of America

Total: \$156,243.89