



GREEK ORTHODOX METROPOLIS OF SAN FRANCISCO

ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΑΓΙΟΥ ΦΡΑΓΚΙΣΚΟΥ

Report of the Greek Orthodox Metropolis of San Francisco Arts and Architecture Committee
Metropolis Council Meeting
San Francisco Metropolis Zoom
April 6, 2021

With the blessings of His Eminence Metropolitan Gerasimos of San Francisco, the Greek Orthodox Metropolis of San Francisco Arts and Architecture Committee (MSFAA) continues to work with parishes seeking to beautify their church structures with appropriate iconography, develop a Master Plan for new building structures on existing sites, as well as remodel or modify existing parish facilities.

The Greek Orthodox MSFAA Committee continues to monitor the progress of parishes and their projects to build, upgrade, remodel or improve their campus structures:

- Construction continues on The Greek Orthodox Cathedral of the Annunciation in San Francisco, CA. A construction manager has been retained for phase two of the interior.
- Construction of the Greek Orthodox Church of Saint Anna in Roseville, CA. will begin shortly after months of delays due to unexpected construction cost increases.
- Iconographic proposals are under review from iconographers for the Greek Orthodox Church of Saint Sophia in Bellingham, WA. In addition, wood carvings for a new iconostasion, bishop's throne, etc., are being finalized.
- The Greek Orthodox Church of The Resurrection of Christ in Castro Valley continues to work with MSFAA Committee reviewing design considerations before final submittal for approval.

The Greek Orthodox MSFAA Committee notes that submittals, with few exceptions, continue to follow the guidelines of the Greek Orthodox Archdiocesan of America UPR. This allows for a proper review by the committee before forwarding recommendations to His Eminence for approval.

Respectfully submitted,
Father Peter G. Salmas
Chair
fpeter@goholycross.org

Report of the Internal Audit Committee to the Metropolis Council

December 16, 2020

The stated purpose of the Internal Audit is “to conduct internal audits, review internal financial statements, and verify the existence of accounting procedures,” as noted in the Metropolis Council Committees definition. As such, the Audit Committee may recommend implementation and enforcement of such internal controls that ensure compliance with good management and accounting practices.

We identified and reported to the January 16, 2012 meeting of the Metropolis Council, and following, that the organizations to be examined, from time to time, by the Internal Auditors are: The Metropolis of San Francisco, St. Nicholas Ranch, the Folk Dance Festival (FDF), and any other entities as may be assigned to the purview of this Internal Audit Committee.

We were unable to do an audit of the St. Nicholas Ranch due to the Pandemic. We need to add a couple of new members to assist with this task. In the near future, we will include the Choir Federation as it too is a ministry of the Metropolis.

As the ministries of the Metropolis continue to grow and expand and as a result, we may need to further assess whether there are other ministries within the Metropolis that may need an audit.

Respectfully submitted,

The Internal Audit Committee of the Greek Orthodox Metropolis of San Francisco

Rev. Thomas Zaferes (frathanz@gmail.com Tel: 510 531-3400)

Philippos Athanasiades (philippos1cy@yahoo.com Tel: 650-534-7357)



Fundraising and Development Report

April 6, 2021

The Fundraising and Development Committee is an important component of the Metropolis infrastructure. Our efforts provide financial support for our operations and for the growth of our ministries.

Faith Forward

We initiated the Faith Forward annual fundraising campaign in 2007, and has been steadily growing since that time. From those early years of generating perhaps \$10,000, the response to this effort has increased tremendously, especially since consolidating our fundraising appeals and shifted to only focus on Faith Forward. The results for the past four years speak for themselves:

<u>YEAR</u>	<u># OF DONORS</u>	<u>TOTAL CONTRIBUTIONS</u>
2017	128	\$110,105
2018	154	\$219,035*
2019	201	\$309,875**
2020	272	\$340,672***

*Includes a \$100,000 donation from the George and Judy Marcus Family Foundation

**Includes a \$125,000 matching grant from the George and Judy Marcus Family Foundation.

***This year we worked hard to send out the Faith Forward materials six weeks earlier than in the past to give our donors more time to support this important campaign. Knowing that this year had additional challenges, we wanted to give our faithful ample time to contribute and help us achieve our matching grant of \$125,000 from the George and Judy Marcus Family Foundation. While we were optimistic about achieving our goal when the 2020 budget was prepared, the pandemic brought forth a level of uncertainty.

We will be promoting Faith Forward in the coming months, and encouraging the support of our faithful so that we can meet our financial obligations as a Metropolis and in support of our ministries. The ongoing and full support of the Metropolis Council as Faith Forward stewardship is sincerely requested and appreciated.

A Bridge for a Brighter Tomorrow

Through the generosity of a small group of donors, the Metropolis was able to offer some financial assistance to our parishes to help them fulfill their National Ministries Allocation, as well as address any extenuating financial concerns from our parishes. The committee reviewed 13 applications which were submitted in December by our parishes and they were informed of our decision prior to the end of the year. The members working with me on this committee are: His Eminence Metropolitan Gerasimos, His Grace Bishop-elect Ioannis, Fanis Economidis, Gerry Ranglas, Jeannie Ranglas, George Psefteas, Philippos Athanasiades, and Kristen Bruskas.

Saint Nicholas Ranch and Retreat Center

The fundraising committee is also working with members of the Ranch Board on a fundraising appeal – A Day at the Ranch – to help cover their operational shortfall. It takes \$1,000 a day to maintain basic operations for this facility. We are pleased to report that people are beginning to respond generously, but we have a long way to go to reach our goal of a full year of sponsorships. Please join us in this effort with your donation, and by spreading the word of this worthwhile cause.

Thank you again for your support!

Sincerely,

Isidoros Garifalakis

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360-901-4637

INSURANCE & REAL ESTATE COMMITTEE REPORT

Greek Orthodox Metropolis of San Francisco Metropolis Council Meeting

April 6, 2021

Insurance:

Bill Marutsos

Real Estate:

Transaction Requests:

The Insurance and Real Estate committee has been working with many parishes on multiple Real Estate Transactions. Presently, there are no files ready to be presented to His Eminence for approval and this report.

A reminder that all Metropolis Real Estate Transactions, require the Metropolitan's blessings for Approval and should be sent to the Insurance and Real Estate committee for review.

Respectfully Submitted,
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On behalf of:
Paul Sogotis
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April 4, 2021

To: His Eminence, Metropolitan Gerasimos,
Vice-Chairman Fanis Economidis, Clergy,
Members of the Metropolis Council, and Laity
of the Greek Orthodox Metropolis of San Francisco

REPORT OF THE LEGAL COMMITTEE

I have served as Chair of the Metropolis Legal Committee at the request of His Eminence, Metropolitan Gerasimos and Fanis Economidis for the past nine (9) years. Prior to my appointment, I had served on the Metropolis Legal Committee for several years along with Elenie Huszagh. Elenie not only founded the Metropolis Legal Committee in 2007 but she also very capably chaired the committee since its inception with great wisdom and distinction. At the time of its formation our Metropolis' Legal Committee was believed to be the first of its kind in the entire Archdiocese. Initially, the only other standing Legal Committee was part of the Archdiocesan Council.

The Mission and Purpose of the Legal Committee is:

1. To Provide legal services and advice to His Eminence and the Metropolis as they may be needed.
2. To assist in matters involving real estate, estate planning, employment issues and other legal risk management matters not necessarily involving litigation.
3. To assist in matters of Parish Administration when requested by His Eminence.
4. To assist in matters of Claims and Litigation when necessary; and refer such matters to the Archdiocese as appropriate.
5. To prepare forms and guides which may be used by Parishes in meeting the requirements of the UPRs.
6. To provide appropriate referrals to other attorneys when needed for matters which may not be within the expertise of a member(s) of the Metropolis of San Francisco Legal Committee.
7. Attorneys of each of the jurisdictions (States) in which a Parish of the Metropolis of San Francisco is located have been contacted and have agreed to serve on the Legal Committee pro bono.

The Legal Committee has completed work on various legal issues including but not limited to:

1. Model bequest and estate planning documents formatted to be used for individuals for consideration and use in making gifts to the Metropolis of San Francisco.
2. Liability Releases for Parishes to use in connection with parish events and off premises trips as well as for other purposes.
3. Employment questionnaires as well as acceptable pre-employment inquiry checklists.
4. Documents for by the Real Estate/Insurance Committees and Parishes working on matters involving mainly real estate and construction issues (contracts, purchase and sale documents, mortgages etc.) as specified in the UPRs.

Recent and pending activities of the Metropolis Legal Committee include:

California Board of Equalization Sales Tax Exemptions: (Interface with venues by providing Customized Attorney Opinion Letters and Resale Certificate Preparation). Result: Sales Tax Exemption for **all** Meals and Food Products Served at religious events according to Board of Equalization (BOE) regulations.

Metropolis of San Francisco Gala(s) resulting in several Tax Exemptions.

FDf: In past years, the BOE Sales Tax Exemption achieved for all meals and food products served during the **FDf providing the ministry with approximate \$30,000.00+ of yearly savings to their bottom-line.**

Further Examples of past BOE Sales Tax Exemption achieved for:

Light the Path: Bishop Anthony Annual Luncheon to benefit The Bishop Anthony Seminarian Scholarship Fund.

PAOI Event: Los Angeles event resulted in approximately \$4,000.00 of savings.

Saint Sophia Philoptochos Debutant Ball at the Beverly Wilshire with approximately \$10,000.00 in savings and **Saint Sophia Philoptochos Annual Mother's Day Luncheon** with similar annual savings.

Saint Anthony Philoptochos Christmas Annual Fashion Show and Luncheon Fundraiser.

...and many others.

Partial (past) List of specific services/examples that the Legal Committee provided are:

- **Advised and assisted two Parishes (St. Demetrios, Tucson, Arizona, and St Gregory, El Cajon, CA) that suffered fire damage and losses during their recovery periods to make appropriate claims and during their replacement, repair, construction, and/or relocation decisions.**
- **Advised St. Katherine, Chandler Arizona in their efforts to select a lender to refinance the Parish debt at more favorable rates.**
- **Assisted in the refinance process with St. Nicholas, Temecula, CA during their acquisition of a new church site and building in Murrieta, California.**
- **At the Metropolitan and Chancellor's request met with Parish Council to address community issues in an advisory capacity.**
- **Ongoing Parish By-Law Review: Additional Legal Volunteers are being sought who are familiar with Parish By-Law drafting and content review to assist in this very time-consuming process). A special committee has been established to assist parishes to create or review by-laws submitted to the committee for approval.**
- **Reviewed and Assisted in a Property Line issues for Saint Anna Parish, Roseville, CA culminating in an agreed upon License Agreement.**
- **Eminent Domain assistance and referrals to appropriate professional.**
- **Liability Release Modifications (Individual Parish Requests).**
- **St. Nicholas Ranch IRS Audit for Employee Withholdings with Metropolis CPA.**
- **Interfacing and communicating with the Metropolitan, Chancellor and supporting personnel at the Metropolis level to provide legal counsel on an "on call basis".**
- **Review and Track estate bequests to the Metropolis. Assign local attorneys in the jurisdiction where the estate is being administered to take lead responsibility with periodic reporting to the Metropolis Legal Committee.**

Regional members of the Metropolis Legal Committee:

All the attorneys who have been appointed to serve accepted on the Legal Committee have agreed to do so "pro bono".

The Members of the Legal Committee are:

Alaska	Pending
Arizona	Alexander Poulos
California	(Northern) Peter A. Bagatelos
California	(Southern) John S. Buzas, Metropolis Legal Counsel
Hawaii	Pending
Nevada	Gus W. Flangas – Flangas, McMillan Law Group
Oregon	George Gregores – Holland & Knight
Washington	Zachary H. Stoumbos – Landerholm, Memovich, Lansverk & Whitesides, P.S.

Employment Law
Counsel at Large:

Maria Anastas, Shareholder, Ogletree Deakins
Dean Pappas – Goodwin Proctor, Los Angeles, California (Real Estate
Specialist)

Report of the Total Commitment and Benefits Committee to the Metropolis Council and

2021 Clergy Laity Congress of the Metropolis of San Francisco

1. 2020 Final TC Update

As at February 5th 2021 our Parishes contributed \$3,664,704 towards our 2020 commitment. This is 102% of our 2020 target of \$3,523,871

2. 2021 Supreme Number and Allocations

Our Metropolis' Supreme Number for the year 2021 remains unchanged at \$3,523,871. Including a 6% cushion, total amount allocated to our Parishes for 2020 is \$3,735,303. Letters informing our Parishes of their 2021 commitment have been mailed and a list of all Parishes and their commitment for next year has been published on the Metropolis website.

3. Appeals

No appeals have been entertained as the TC has remained unchanged.

4. Process for 2021/2022 Allocations

We anticipate and hope that we will open the window for submissions on April 20st 2021. Per the Archdiocese's instructions, no submission will be accepted without accompanying full financial statements. In the absence of these, there will be an automatic 10% increase from the prior year's assessment, per the Archdiocese's Finance Committee instructions.

5. Benefits

A new process has been adopted regarding Pension Fund contributions, similar to the TC allocation process and taking into regard the status of each Parish and the number of Clergy serving. TC numbers have been used as an approximation of Parishes' financial status and ability to contribute. Our Metropolis has been allocated the amount of \$743,400 (\$805,135 with cushion). Appeals have been entertained and granted as deemed appropriate by His Eminence.

In general, our Parishes need to be congratulated for their efforts in meeting our commitment goals under very difficult circumstances.

Respectfully submitted

On behalf of the Total Commitment and Benefits Committee

Philippos Athanasiades, Chair

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April 2, 2021