



The Order of Saint Ignatius of Antioch

2023 Antiochian Archdiocese Convention Report
Friday, July 28, 2023

Challenges & Solutions

Challenge: Aging Membership

In 2015 an actuarial study was done on the Order membership, and it was estimated that The Order could experience about a 30% loss in annual revenue between 2025 and 2030 due to an aging membership. The *average age* of the membership was estimated to be around 62 years old. This trend is a reality as we are experiencing a drop in annual giving because of members unable to continue their annual gifts due to financial reasons (living longer and medical expense increases) as well as from death.

Solution: In 2017, we introduced the Metropolitan level of \$30,000 one-time gift and we permanently put in place the Lifetime and Metropolitan Upgrade programs. The Life Member and Metropolitan Member Upgrade programs have brought in approximately **\$690,000** in 6 ½ years to help build the endowment which was our focus. The full-Lifetime and full-Metropolitan memberships from 2017 to now have brought in **\$930,000** to help build the endowment and help raise the annual earnings. The increase in the investable assets helps increase the annual income that is used to help fund the projects, departments and grants of the Archdiocese. The Lifetime and Metropolitan memberships are deposited into the endowment investment portfolio and not used for annual needs directly. The annual income/earnings from the endowment each year is used toward funding the annual needs of the Order's ministry.

Challenge: Annual Gifts, Albeit Generous, Don't Go As Far As They Did Since The Order's Inception

The math is simple. It takes \$1,557 today to maintain the purchasing power of \$500 in 1976. It takes \$3,114 today to maintain the purchasing power of \$1,000 in 1976. The Order and the ministries it supports are not exempt from rising costs from increased needs and inflation.

Solution: In 2023 we have begun a new upgrade campaign. That campaign is targeting upgrades from the Knight and Dame level (\$500 per year) to the Knight Commander and Dame Commander level (\$1,000 per year). This campaign will help increase our annual revenue from annual gifts along with our continued requests of new member gifts/memberships. Our goal is to increase our revenue from existing Knight and Dame members by \$150,000 in 30 months. This would require that 300 of the existing Knight and Dame members would need to upgrade. That is about 9.1% of our total membership. We believe this is an achievable goal and will help increase annual income more quickly along with new induction efforts.

Challenge: Attracting Volunteers For Order Governing Council & Parish Ambassadors

The Order, since its inception, has always relied on the generosity of the Governing Council members, officers, Diocesan Chairs and Vice-Chairs to complete the ministry of The Order of Saint Ignatius of Antioch. This has meant that over the years, that all expenses related to travel, lodging and even event sponsorships have come from these volunteers personally. It is how The Order has been able to limit its administrative expenses to a range between 7.2% to 7.7%. Providing travel and lodging reimbursement in the future may be necessary to attract younger, volunteer leaders of the Order.

Solution: Since February 2023, we have been focused on active recruitment of Ambassadors throughout the Archdiocese. Just a little over 18 months ago we had just over 50



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Ambassadors. Currently we have recruited 120 Ambassadors at the parish level. This will help The Order become more efficient with communications and education about The Order. This network of Ambassadors will help in scheduling visits to parishes with the sole focus of Order education and invitations to become part of the ministry by becoming an Order member. It will also help us facilitate on a personal basis the upgrade programs with existing members and most importantly provide an expression of gratitude to existing members. We hope that members will read this report and be inclined to help us by scheduling a visit.

Challenge: Membership Database Continues To Need Updating

Since 2015, we have been working on cleaning up The Order database. The membership was not maintained in a consistent manner to keep up with critical member communication information like, current addresses, current email addresses, phone numbers (cell phones). It placed a major challenge on The Order to communicate effectively with its membership. In addition, due to privacy rules and regulations, The Order cannot simply access information from the Department of Conventions and Conferences to get that data updated. The Order is also not able to access the data from the Archdiocese to communicate to non-members due to certain privacy rules and regulations.

Solution: We are always focused on improving the accuracy of The Order membership database. Zlata Ryan, The Order administrator, has done an amazing job updating the database since she was hired to be The Order administrator in 2017. In 2022, we conducted a meeting during the Clergy Symposium at the Antiochian Village with the attending clergy. During that time, we were able to dramatically update The Order database like never before in a matter of 45 minutes. We had the attending priests review each of their Order membership lists and help us determine who had passed away, and who would also be a good Ambassador from their parish for us to contact. We asked that they take a separate list back to their parish and send us updated contact information. Some priests followed through but not as many as we would have hoped. However, this was the fastest and most accurate update method we have ever implemented.

Challenge: Events And Exposure During Parish Life Conferences Is Out-Dated & Limited

The model of luncheons or dinners during parish life conferences does not provide enough opportunity to reach new members and update current members. There also isn't a formal, scheduled time for The Order to present at any of the other major events or after services during "peak" attendance days of the conferences. The luncheons are lightly attended due to the time of day and the dinners or evening receptions may have a heavier attendance, but most of the attendees are current members. This may be effective for membership updates and reinforcement, but not as effective to attract new members.

Solution: The Order's first solution was to discontinue the placement of Order ads in the PLC ad books and sponsor the Conference app. We still have some work to do to improve our content for this strategy. We are also beginning to work with Raed Sweis and Carol Jazar of the Department Convention and Conference Planning to formally schedule Order presentations during PLC widely attended PLC events (Bible Bowl or Youth Awards



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Ceremonies) and after a Vespers Service on Friday or Saturday evening. Scheduling a presentation during the Bible Bowl or the Youth Awards ceremonies is appropriate because of the support The Order provides to many youth programs in the Archdiocese. We are also trying to figure out how to possibly have an Order reception before a Friday night event or the usual Saturday night Grand Banquet and Hafli. That is being worked on for 2024 and beyond.

Challenge: Hierarchal Visits Don't Always Allow For A Formal, Focused Opportunity To Introduce The Order

The Order has traditionally followed a model that a member of the Governing Council accompany a Hierarch to a parish visit. The problem that comes with this is that our Hierarchs visit our parishes on a more regular basis and as a result there isn't a formal banquet reception or event with the entire parish during that weekend visit that allows for a presentation to be shared. In addition, when there is a formal event by a parish during a Hierarchal visit, The Order or a Governing Council member is not always invited and sometimes seen as more of a distraction to the celebration and our message sometimes gets lost. It is also difficult to coordinate an Order representative's travel availability with our Hierarchs' and that also results in a lost opportunity.

Solution: In the fall of 2021, His Eminence Metropolitan Joseph gave approval for The Order to conduct parish visits without a Hierarchal visit. The structure of the visits would ideally be a town hall discussion with members and non-members on Saturday evening after Vespers and a presentation after Divine Liturgy on that Sunday. This is already being done and we have experienced great success. The Saturday evening town hall discussions and presentations are much more effective than a banquet speech. It gives us an opportunity to "get to know" and express our gratitude to members in a sincere and quite environment. It also provides for a more focused conversation, not a "sales pitch", about The Order and the importance of its ministry. Inductions can either be done by the priest or at another time when the Hierarch visits the parish. The idea is to allow people to say yes and accept their gift immediately and not only when the Hierarch is in town or there is a future celebration. This will help the membership grow at a faster rate than our old model of recruitment.



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Membership Tracking & Trends Update

Below is the updated chart showing members changes going back to 2017.

Membership Tracking Since Archdiocese Convention 2017								
	2017	2018	2019	2020	2021	2022	2023	Total
	7/29/2017-12/31/2017**	1/1/2018-12/31/2018	1/1/2019-12/31/2019	1/1/2020-12/31/2020	1/1/2021-12/31/2021	1/1/2022-12/31/2022	1/1/2023-7/10/2023	1/1/2017-7/10/2023
Inducted*	71	80	48	17	51	72*	40	379
Upgraded	21	12	15	4	14	23*	17	106
TOTAL	91	86	63	21	66	95	57	485
Deceased	24	56	14	28	36	175**	20	353
Resigned	12	26	15	20	23	34	11	141
Sabbatical	7	17	7	24	7	22***	14	98
Inactive	7	12	12	17	8	50**	15	121
TOTAL	50	111	48	89	74	281	60	421
Active to date Dec 31,2020/July 10, 2023								2721/2744
<p>*We see most inductions and upgrades at PLCs and in December/St. Ignatius month.</p> <p>** The number of Inactive and Deceased in 2022 rose because of two database cleanups. One in April 2022, and the other one after Clergy Symposium in August 2022. There were Order members who were not counted historically until April database cleanup, and all of them were either deceased or inactive. In July 2022, the priests who attended The Order meeting during Clergy Symposium gave the updated lists of The Order members in their parishes who were deceased (most of them for several years). The DOD may not have happened in 2022, we just found out that they were deceased in 2022,</p> <p>*** Sabbatical – 16 out of 22 are on Sabbatical due to financial reasons – illness, business setback; 3 have problems with the Archdiocese and want to take a break, 3 are misc. for other reasons.</p> <p>Note: January 1, 2021 to December 31, 2022: 50 members reinstated - Knight, Dame & Commanders, includes 2 Upgrades to Life & 1 Metropolitan Upgrade</p>								



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New Inductions Tracking Update

Below is the updated chart showing inductions YTD 2023, annually for each year going back to 2017 and in total since 1/1/2017 through 7/10/2023

RANK	New Inductions Since Archdiocese Convention In 2017								Revenue	Frequency
	2017	2018	2019	2020	2021	2022	2023	Total		
	1/1/17-12/31/17	1/1/18-12/31/18	1/1/19-12/31/19	1/1/20-12/31/20	1/1/21-12/31/21	1/1/22-12/31/22	1/1/23-7/10/23	1/1/17-7/10/23		
Inducted										
Junior	2	2	6	1	1	1	1	14	\$4,200	Annually
Knight/Dame	62	66	25	15	39	47	35	289	\$144,500	Annually
Commander	5	2	4	0	4	9	3	31	\$31,000	Annually
	Total Recurring Revenue								\$179,700	Annually
Life	2	4	10	0	5	10	1	32	\$480,000	One-Time
Metropolitan	0	6	3	1	2	3	0	15	\$450,000	One-Time
	Total One-Time Revenue								\$930,000	One-Time
Total Induct.	71	80	48	17	51	74	40	381		
Upgraded										
Commander	2	2	0	2	3	13	14	36	\$36,000	Annually
	Total Recurring Upgrade Revenue								\$36,000	Annually
Life	4	4	3	1	8	4	1	25	\$250,000	One-Time
Metropolitan	15	6	12	1	3	6	1	44	\$440,000	One-Time
	Total One-Time Upgrade Revenue								\$690,000	One-Time
Total Upgrades	21	12	15	4	14	23	2	91		
	Total Metropolitan & Life Member Upgrades & Full Inductions Capital To Endowment									\$1,620,000
	Not all the \$1,620,000 has reached the endowment. In part the money has been received and pmts. being made.									

The following chart is a historical view of the Order Endowment total values for each year end listed below and the YTD through June 30, 2023. The efforts of the Archdiocese Investment Committee, led by Dr. Elias Hebeke until May 2022, helped grow the Endowment substantially over past 6 ½ years. Dr. Hebeke and his committee's efforts along with the Order programs to build the Order Endowment have helped to increase the endowment to almost **\$9.0M**. This is even after the 2022 bear market in both the bond and stock markets in which stocks fell more than **-24%** within 2022 (Benchmark: S&P 500 Index) and the bond market fell over **-16.5%** within 2022 (Benchmark: iShares US Agg. Bd ETF). Our goal is to get the endowment to **\$11.0M** by the end of 2025. This has been changed from the end of 2024 given current market conditions and allowable risk with the Order Endowment portfolio. **The numbers in the "Endowment History & Projection" Chart below do not reflect the Money Market balance, or the checking and savings balances held outside of Merrill Lynch.**



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Endowment History & Projection Analysis As Of July 7, 2023	
Year	Endowment Value
2023 (YTD July 7, 2023)	\$8,871,438
2022	\$8,540,059
2021	\$9,758,437
2020	\$8,677,709
2019	\$7,476,909
2018	\$6,472,793
2017	\$7,009,439
2016	\$6,315,135

Estimated Organic Growth Needed To Meet \$11.0M Goal By End Of 2025 \$925,816 Estimated Shortfall After Estimated Returns Listed in Column Below	
Membership Level	3% (2 nd Half 2023) and 5% (2024), 5% (2025) Portfolio Growth July 7, 2023 Report
Full Metropolitan Members (New)	31
Full Life Members (New)	62
Metropolitan Or Life Member Upgrades	93

New Initiatives

New Initiative: Annual or Semi-Annual Order of St. Ignatius Virtual Workshop

In a recent Governing Council meeting, we decided to host a North American virtual meeting for The Order of St. Ignatius. This meeting will feature guest speakers or a guest speaker from one or more of the departments The Order funds. We will also feature a guest speaker from one of the organizations The Order provided a grant to in recent years. This will be promoted in The Word and may be done twice a year. The Governing Council is working on the details of this event which we are planning to host the first one in the 4th quarter of 2023 or 1st quarter 2024 or during Lent of 2024. Date for this is to be determined and a chairperson is to be assigned by the Governing Council.



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Membership Objectives Goals

New Membership Objectives For Next 2 years and 6 months

Annual Contributions	New Members & Upgrades By End Of 2025	Additional Revenue By End Of 2025
Junior	25	\$7,500
Knight/Dame	100	\$50,000
Commander	30	\$30,000
Commander Upgrades	200	\$100,000
Total New Inductions & Commander Upgrades (Annual Membership)	355	\$187,500
Full Membership	New Members & Upgrades By End Of 2025	Additional Organic Endowment Deposits By End Of 2025
Life	15	\$225,000
Metropolitan	4	\$120,000
Upgrades		
Life	15	\$150,000
Metropolitan	7	\$105,000
Total New Inductions & Upgrades (Endowment Funding)	406	\$600,000

Milestones: Quarterly Measurable Objectives

Category - Annual	Quarterly Goals - Next 10 Quarters
Junior	2
Knight/Dame	10
Commander	3
Commander Upgrades	20
Annual Gift Membership: Quarterly Total	35

Category - Lump Sum Full Membership	
Life	2
Metropolitan	1 - every 6 months
Full Lump-Sum Members	2.5
Category - Lump Sum Upgrades	
Life	3 Every 6 Months
Metropolitan	.7
Full Lump-Sum Upgrades	2.2



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Updated Recruitment & Education Materials For Use & Distribution With OSIA Network	
4 th Quarter 2023	Deadline
Completely Create Additional Materials & Brochures	October 1, 2023
Distribution To All Appointed Ambassadors & Parishes	October 1, 2023
Letter For Parishes For Camp Scholarships – Camping Leadership	December 15, 2023
1 st Quarter 2024	
Update Materials With New Numbers From 2022	March 31, 2023

Saint Ignatius Month – Highlight The Commander Upgrade Campaign (Inflation Approach)	
Spending Power Sheet	November 30, 2023
St. Ignatius Month Letter Sent To Ambassadors & Parishes	November 30, 2023

Ambassador Recruiting & Appointment – 85% Of Parishes Appointed	
Overall Goal Achievement	December 31, 2023
2 nd Quarter 2023 End	110 Cumulative
3 rd Quarter 2023 End	185 Cumulative
4 th Quarter 2023 End	215 Cumulative

Non-Hierarchal Visits Completed – 35 Over 18 Months	
Overall Goal Achievement	December 31, 2024
End of 2023	10 Cumulative, 10 Visits Completed
End of 2 nd Quarter 2024	25 Cumulative, 15 Visits Completed
End of 4 th Quarter 2024	35 Cumulative, 10 Visits Completed
2 nd Quarter 2024 as part of the visit schedule, a visit to the host parishes for each PLC	Visits Completed By May 1, 2024, this would be part of the 15 for the quarter.

Overhauled Order Website - Partnering With Archdiocese Communications & Wired Impact?

Item To Complete	Date To Be Completed By
Meeting To Discuss Complete Redesign Of Order Website & Requirements/Restrictions From Archdiocese Communications – Peter Samore & Committee	September 1, 2023
Gather Data For Website & Submit To Web Designer	October 1, 2023
1 st Round Website Adjustments To Initial Design	December 1, 2023
Meeting To Review OSIA New Site With Governing Council	October 31, 2023
Final Website Version Goes Live	February 1, 2024



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Structure OSIA Social Media Presence - Partnering With Archdiocese Communications Department

Item To Complete	Date To Be Completed By
Meeting To Discuss Content & Schedule For OSIA Social Media Presence Requirements/Restrictions From Archdiocese Communications – Peter Samore & Department	October 1, 2023
Gather Initial Data For Social Media Posts	September 1, 2023
Schedule Social Media Posts For 6 Months	October 1, 2023
Gather Additional Data For Remaining Posts For Next 6 Months	December 1, 2023
Schedule Next Posts For 2 nd & 3 rd Quarter 2023	March 1, 2024

Redesign Constant Contact Email Communication Template

Item To Complete	Date To Be Completed By
Meeting To Discuss Content & Schedule For OSIA Email Campaign - Requirements/Restrictions From Archdiocese Communications – Peter Samore & Department	August 1, 2023
Newly Designed Email Template	September 1, 2023
Content & Video Greeting For December, St. Ignatius Month Email	November 15, 2023
Initial Email With Video Greeting & Department/Project Highlight	October 1, 2023
Scheduled Quarterly Email & Video Greeting.	February 1, 2024
Scheduled Quarterly Email & Video Greeting.	May 1, 2024
Scheduled Quarterly Email & Video Greeting.	August 1, 2024
Scheduled Quarterly Email & Video Greeting.	December 1, 2024

Develop & Schedule Virtual Order Workshop

Item To Complete	Date To Be Completed By
Meeting To Discuss Content & Schedule A Date	July 28, 2023
Meeting To Discuss Content, Schedule & Logistics With Archdiocese Communications – Peter Samore & Department	August 15, 2023
Create & Finalize Invite	December 1, 2023
Begin 2 Month Invite & Save The Date Campaign	January 15, 2024
Final Count & Attendees Closing	March 1, 2024
Hold Workshop	Month of March 2024



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Governing Council Or Order Member Personal Reflection Of The Order For WORD Magazine

Item To Complete	Content Complete - Submission
Submission	August 2023 - October 2023
Submission	January 2024 - March 2024

PLC Convention App Redesign & Content For 2023 PLCs

Item To Complete	Date To Be Completed By
Meeting With Department of Conference & Convention Planning For Content & Functionality Changes - Meeting 1	October 15, 2023
Meeting With Department of Conference & Convention Planning For Content & Functionality Changes - Meeting 2	September 1, 2023
Final Approval Of Content & Functionality	October 1, 2023

PLC Convention Structured/Mandatory Education Time & Event Changes

Item To Complete	Date To Be Completed By
Meeting To Discuss Set Times For Scheduled Order Education & Presentations – Events With High Traffic/Attendance & After Worship Services (Not Just Luncheons) – For 2024 PLCs?	September 15, 2023
Set New Events For PLCs By Diocese For 2024	October 1, 2023
Send communications outlining new event structure for The Order to 2024 host parishes	October 1, 2023

Order Budget Submission For 2024

Item To Complete	Date To Be Completed By
Meeting With Salim, Father Tassos, Fawaz &/or New Metropolitan To Establish Preliminary Budget Projections & Expectations For 2024	July 15, 2023
Finalize 2024 Budget With Salim & Committee	September 30, 2023
Review 2023YTD Status	Monthly
Review & Approve Final 2023 Actual Numbers For Use In Updated Communications/Education	February 28, 2024

In HIS Service,

Roger J. David
North American Chairperson
The Order of St. Ignatius of Antioch