



St. Mary Orthodox Christian Church (Wichita, KS) - Financial Overview and SROI: 2019-2024 and 2025 Budget

The Financial Overviews are educational tools for leadership and community learning. **Step #1:** Analyze five years of historical and budget data to extract key lessons learned. **Step #2:** Build an ambitious, achievable five-year Financial Overview with projections, and compare results to both budgets and prior projections.

	Actual						Budget	2019 to 2024			2024 Comparison to Peers		
	2019	2020	2021	2022	2023	2024	2025	\$ Change	% Change	CAGR	Peer Avg.	% of Peer Avg.	Difference
SROI (Social Return on Investment)	9.5x	9.3x	8.5x	7.2x	7.5x	7.3x	8.3x	-2.2x	-23%	-5%	4.1x	179%	3.2x

Observations:

1. SROI from 2019 to 2024 decreased from 9.5x to 7.3x, and is 179% of peer average in 2024.
2. Financial Assets from 2019 to 2024 had a CAGR of -9%, a decrease of \$126,276, or -36%.
3. Church Related Income from 2019 to 2024 had a marginal increase of \$467.
4. Total Spending from 2019 to 2024 had a CAGR of 4%, an increase of 24%.
5. Church Related Income % of Total Income stayed flat at approximately 100%.
6. Church Related Income per Faithful from 2019 to 2024 increased by \$120, and per Member by \$10.
7. Total Spending per Faithful from 2019 to 2024 increased by \$637, and per Member by \$330.
8. Faithful % of Members from 2019 to 2024 decreased from 63% to 61%.
9. See Comparison to Peers in the bottom-right box.

Balance Sheet	Actual						Budget	2019 to 2024			2024 to 2025 Budget	
	2019	2020	2021	2022	2023	2024	2025	\$ Change	% Change	CAGR	\$ Change	% Change
Financial Assets	\$348,930	\$238,837	\$295,586	\$261,126	\$257,884	\$222,654	\$245,189	-\$126,276	-36%	-9%	\$22,535	10%
Non-Financial Assets	\$2,318,943	\$2,439,540	\$2,459,406	\$2,516,999	\$2,530,505	\$2,542,770	\$2,542,770	\$223,827	10%	2%	\$0	0%
Total Assets	\$2,667,874	\$2,678,377	\$2,754,992	\$2,778,125	\$2,788,389	\$2,765,424	\$2,787,959	\$97,550	4%	1%	\$22,535	1%
Financial Debts	\$0	\$22,900	\$0	\$0	\$0	\$0	\$0	\$0	0%	0%	\$0	0%
Non-Financial Debts	\$6,172	\$945	\$3,285	\$958	\$1,018	\$1,507	\$1,507	-\$4,665	-76%	-25%	\$0	0%
Total Debts	\$6,172	\$23,845	\$3,285	\$958	\$1,018	\$1,507	\$1,507	-\$4,665	-76%	-25%	\$0	0%
Net Worth	\$2,661,702	\$2,654,532	\$2,751,707	\$2,777,167	\$2,787,370	\$2,763,917	\$2,786,452	\$102,215	4%	1%	\$22,535	1%

Income Statement	Actual						Budget	2019 to 2024			2024 to 2025 Budget	
	2019	2020	2021	2022	2023	2024	2025	\$ Change	% Change	CAGR	\$ Change	% Change
Income:												
Church Related - CR (a)	\$308,494	\$260,517	\$335,124	\$335,825	\$309,809	\$308,961	\$337,208	\$467	0%	0%	\$28,247	9%
Non-Church Related (b)	\$541	\$223	\$29,294	\$523	\$13,119	\$4,392	\$1,600	\$3,851	712%	52%	-\$2,792	-64%
Total Income	\$309,035	\$260,740	\$364,418	\$336,348	\$322,928	\$313,353	\$338,808	\$4,318	1%	0%	\$25,455	8%
Total Spending	\$271,044	\$267,909	\$267,243	\$310,888	\$312,725	\$336,806	\$316,273	\$65,762	24%	4%	-\$20,533	-6%
Net Income / Loss	\$37,991	-\$7,169	\$97,175	\$25,460	\$10,203	-\$23,453	\$22,535	-\$61,444	-162%	n.m.	\$45,988	-196%
CR % of Total Income	100%	100%	92%	100%	96%	99%	100%					

Ratio of Church Related Income CAGR to Expenses CAGR: 0x

Per Faithful and Members

Church Related Income:												
Per Faithful	\$2,391	\$2,084	\$2,940	\$2,998	\$2,626	\$2,512	\$2,555	\$120	5%	1%		
Per Member	\$1,512	\$1,283	\$1,651	\$1,654	\$1,455	\$1,522	\$1,606	\$10	1%	0%		
Total Spending:												
Per Faithful	\$2,101	\$2,143	\$2,344	\$2,776	\$2,650	\$2,738	\$2,396	\$637	30%	5%		
Per Member	\$1,329	\$1,320	\$1,316	\$1,531	\$1,468	\$1,659	\$1,506	\$330	25%	5%		
								# Change	% Change	CAGR		
Number of Faithful	129	125	114	112	118	123	132	-6	-5%	-1%	106	116%
Number of Members	204	203	203	203	213	203	210	-1	0%	0%	324	63%
Capacity	190	190	190	190	190	190	190	0	0%	0%	209	91%
Faithful % of Members	63%	62%	56%	55%	55%	61%	63%	-3 pps.	-4%	-1%	39%	157%
Faithful % of Capacity	68%	66%	60%	59%	62%	65%	69%	-3 pps.	-5%	-1%	56%	116%

2024 Comparison to Peers		
Peer Avg.	% of Peer Avg.	Difference
\$3,866	65%	-\$1,354
\$1,428	107%	\$94
\$5,821	47%	-\$3,083
\$2,267	73%	-\$608
106	116%	17
324	63%	-121
209	91%	-19
39%	157%	22 pps.
56%	116%	9 pps.

Notes:

(a) Includes stewardship givings, donations, fundraisings, and sacraments. (b) Include financial income, e.g. interest income and financial gains and losses, and rental income. (c) CAGR: Compound annual growth rate; n.a.: not available; n.m.: not meaningful. (d) For additional information on SROI, see Khachkar Studios Briefing Packet #5.