OnTarget CONSULTING inc.

DIOCESE OF NORTHERN CALIFORNIA

Mission Apportionment Survey

Capstone Synthesis Report

A single, integrated read of everything the survey found

124	55	213	30
SURVEYS	CONGREGATIONS	RESPONDENTS	QUESTIONS

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All survey responses were collected anonymously.
Quotations in this report are reproduced accurately from respondents' own words but are presented without attribution to any individual, role, or congregation to preserve anonymity.

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Background

At the 2025 Diocesan Convention, a resolution (R2-2025) was put forward proposing a reduction in apportionment, a simplification of the process by which apportionment is calculated and defined support for congregations who find themselves unable to pay their full apportionment. This resolution was referred to the Board of Trustees for further study and action, establishing the Missional Apportionment (MAP) team.

The MAP team's mandate is to thoughtfully assess the impacts of reducing apportionment on mission and sustainability, explore alternative models to apportionment, listen deeply to the experience of congressional leaders and bring forward a progress report to the 2026 Diocesan Convention and clear recommendations to the 2027 Diocesan Convention.

The MAP subgroup in charge of assessing the impact of apportionment chose to create a survey as a means of better understanding the lived realities of the diocese's congregations and leaders and invited all 60 churches' paid clergy (if present), senior wardens and treasurer to respond.

Fifty-five of the 60 churches in the diocese submitted at least one response, with 50 churches submitting responses from paid clergy (if present), a senior warden and a treasurer. Other lay leaders and staff also responded resulting in a total of 124 surveys being collected from 213 respondents. This report analyzes and highlights the responses in those surveys.

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Executive Summary

The 124 responses submitted by 55 congregations paint a picture of a diocese that is financially stressed but not despairing. Although the strain is widespread, a clear majority of congregations rate their overall vitality as very strong or generally healthy with over 80% categorizing themselves as very or cautiously hopeful. The thoroughness of the responses indicates thoughtful engagement with the survey process and a deep desire to help the Office of the Bishop & Board of Trustees understand the lived realities of its congregations and leaders.

Three findings anchor everything else in this report:

1. Apportionment concern scales sharply with congregation size — although this complaint is not uniform.
Only 13.8% of small congregations cite the overall apportionment amount as a top challenge, compared with 52.9% of medium and 70.0% of large congregations. Small congregations struggle to understand how the amount is calculated (for 34.5%, it is their top concern). This means a single formula fix aimed at lowering the amount would address the loudest complaint from medium and larger congregations while leaving small congregations' need for greater clarity untouched.

2. The qualitative and quantitative pictures agree almost perfectly on the two dominant financial asks.
Across all data analysis, the same two requests surface independently, in both the numbers and the open-ended text. Rather than being isolated complaints, they are the most repeated, more specific and most consistently phrased points in the entire dataset:

- calculate apportionment on income rather than expenses (and stop penalizing congregations for drawing on reserves)
- apply the same budget discipline to the diocese's own staff and overhead that congregations have already applied to theirs.

3. Respondents distinguish sharply between diocesan people and diocesan process — with HR/administrative support as a notable exception.
The diocesan treasurer, canon, and chancellor's office draw warm, specific praise with almost no negative countersignal. Diocesan convention logistics, Safe Church/Live Scan administration, the Racial Justice Audit, and the Congregational Vitality Survey (FaithX) drew specific criticism and almost no positive counterpoint. The HR/administrative function in the Office of the Bishop breaks this otherwise clean split: praise for it is real but brief and general, while criticism is detailed and describes unresolved, recurring problems — a lack of responsiveness, incorrect information or guidance, and frustration that congregations are being left to shoulder legal risks the diocese should be addressing or preventing.

Beneath these three findings, an aging membership base and the resulting financial consequences is the single most pervasive condition in the survey, mentioned in some form in nearly every open-ended answer regardless of which question was asked. Financial stability, congregational vitality, and outlook track closely together at the individual congregation level. Worth noting is the distinct minority of respondents who caution against assuming that lower apportionment is the right answer, warning that doing so without a plan could reduce the diocese's capacity to support its most vulnerable congregations.

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Who Responded

Fifty-five congregations submitted 124 surveys with many submitting more than one. One survey was submitted anonymously and cannot be matched to a congregation. Roughly two-thirds of the surveys (63.7%) were completed by a single respondent; the remaining third were completed jointly by two or more congregation leaders, as indicated by multiple roles checked on the same survey.

How the survey was completed	n	% of responses
Single respondent — Clergy	20	16.1%
Single respondent — Senior Warden	24	19.4%
Single respondent — Treasurer	13	10.5%
Single respondent — Staff/Lay Leader	22	17.7%
Jointly completed (2–4 roles represented)	44	35.5%
No role indicated	1	0.8%

n = 124 responses.

For the purposes of this analysis, the 55 congregations were divided into three roughly equal tertiles by 2025 average Sunday attendance (ASA): *Small* (18 congregations), *Medium* (18 congregations), and *Large* (19 congregations).

	Small	Medium	Large
Congregations responding	18	18	19
2025 ASA range	5–25	27–63	78–281
2025 operating budget range	$12,975–$121,868	$48,624–$460,182	$250,578–$1,620,199

Size bands and ASA ranges per the Quantitative Findings Report; budget ranges calculated from the same underlying congregation-level survey data using the identical size bands.

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Financial Health, Vitality & Outlook

Just over half of the congregations describe their financial situation as very stable or generally stable (53.2% combined) with 36.3% managing with difficulty and 9.7% under significant strain. Vitality tracks a similar pattern: 67.7% describe themselves as very strong or generally healthy, 17.7% as mixed, and 8.9% as struggling. When looking three to five years out, 83.0% of respondents describe themselves as very hopeful or cautiously hopeful, with only 8.0% concerned or very concerned.

These three measures are not independent — congregations reporting significant financial strain are far more likely to report struggling vitality and a less hopeful outlook, and vice versa. Among congregations under significant strain, only 9.1% describe their vitality as very strong versus 64.3% among the most stable. The pattern holds for outlook too: strained congregations are the only group with a meaningful concentration in concerned and very concerned responses.

Financial situation	Struggling vitality (%)	Very strong vitality (%)	Very hopeful outlook (%)
Very stable	7.1%	64.3%	35.7%
Generally stable	0.0%	16.3%	43.9%
Managing with difficulty	12.5%	32.5%	25.6%
Under significant strain	27.3%	9.1%	0.0%

As financial situation worsens, the share reporting struggling vitality and less-hopeful outlook rises, and the share reporting very strong vitality and very hopeful outlook falls. n = 108 (financial × vitality), 106 (financial × outlook).

Note: since each respondent defined terms like "very hopeful" and "cautiously hopeful" themselves, the numbers in the vitality and outlook columns don't descend in a straight line. But when the top two categories for "very stable" and "generally stable" are taken together, a clearer picture emerges.

Why does the data trend this way? An aging, shrinking donor and volunteer base is the single most pervasive condition in the survey, surfacing not only in vitality questions but repeatedly in answers about financial situation, missional life, and future outlook. Respondents describe a self-reinforcing cycle — they are losing long-time pledging members, newer members aren't able to give at the same level and this revenue gap compounds just as facilities and programs need more investment, not less.

> *"We have many new people in the pews on any given Sunday. Many are younger and less affluent than our typical member, which is exciting but also means that they aren't able to contribute as much financially."*
>
> *"Older financially stable members who are habitual pledgers moving away or dying. We have new folks coming in and from an ASA standpoint are actually outpacing decline, but most of our newer folks are not as financially stable or accustomed to pledging."*

In a related, equally pervasive pattern, a substantial number of congregations describe routinely running deficit budgets, sustained by reserves or one-time gifts, with several noting this is workable only in the near term before the reserves run out.

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The Apportionment Experience

When asked to name what is most challenging about apportionment (respondents could choose more than one option), the overall amount is the most cited at 51.6%, followed by understanding how the amount is calculated (32.3%), the timing and amount of reporting required (28.2%) and the impact on cashflow (27.5%). Only 15.3% of the respondents identified predictability year to year, with 8.1% selecting the timing of assessments. This suggests that the amount and clarity of the calculation are larger concerns than the payment schedule itself.

The Concern Is Not Evenly Distributed by Size

This is one of the most operationally important findings in the entire survey. Broken out by congregation size, the concern about the overall amount rises sharply with size, while understanding the calculation is the dominant concern for small congregations. That said, 26.5% of medium congregations and 35.0% of large congregations also said that understanding the calculation was a challenge.

> *"I am exhausted by having diocesan staff repeatedly tell me that it isn't hard and shouldn't be taking us any significant time."*

Congregation size	Overall amount	Understanding the calc.	Cash-flow impact
Small (n=29)	13.8%	34.5%	13.8%
Medium (n=34)	52.9%	26.5%	35.3%
Large (n=60)	70.0%	35.0%	30.0%

Percent of responses within each size tertile selecting each challenge as a top concern (multi-select).

Put another way, small congregations are not complaining primarily about how much they pay; they are struggling with understanding why they pay what they do. Large and medium congregations, in contrast, are focused on the overall dollar amount. Thus, any single fix to apportionment will leave one or more segments' issues unresolved.

Medium congregations find themselves squeezed in a unique way. They report running deficit budgets or drawing on reserves at the highest rate of any tier (35.3% vs. 25.0% for large and 3.4% for small), and they are the tier most likely to flag the impact on cash flow. This pressure traces to a specific structural bind — they often carry the cost of full-time paid clergy and pay a significant amount in apportionment on a revenue base that isn't big enough to comfortably support both.

Understanding, TMR Experience, and the Income-vs-Expense Objection

45.9% of respondents describe the apportionment calculation as very or generally clear, but 32.2% describe it as very unclear or not sure/not engaged — meaning roughly a third of respondents cannot confidently explain the calculation that determines one of their congregation's largest expenses. Experience completing the Treasurer's Monthly Report (TMR) is similarly split: 47.6% describe it as clear and manageable or manageable but time-consuming, while 25.8% describe it as difficult or unclear, and a quarter of respondents (25.0%) are not directly involved in it at all.

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The qualitative data gives this quantitative split its texture. The single most consistent, specific piece of technical advice across the entire survey — repeated independently by respondents across every respondent role and every congregation size — is to calculate apportionment on income rather than expenses, and specifically to stop counting reserve withdrawals as income subject to further apportionment. Respondents describe this current mechanic as penalizing congregations exactly at the time they can least afford it.

> *"Find a way to stop punishing a parish for withdrawing from reserves because that is not actually new income and results in increased assessment at precisely the moment a church is in trouble."*
>
> *"Why isn't the apportionment like a tithe based on income?"*

Treasurers in particular — who are responsible for completing the TMR — give the most technically specific version of this critique, down to disputes over how individual line items like mortgage principal payments are treated on audit, and a clear, recurring preference for the prior version of the TMR form over the current one.

> *"The new form is too long and the formula is faulty. Sometimes we take in less but pay more. The old form was much simpler and easier to understand."*
>
> *"Go back to the old form, which was simpler, clearer, and covered all aspects very well."*

The Diocese Should Apply the Same Discipline It Asks of Congregations

The second dominant, independently repeated theme across the qualitative data — nearly as frequent as the income-versus-expense request — is that the diocese should reduce its own staffing and overhead in proportion to what congregations have already had to cut, rather than treating apportionment as the variable that absorbs whatever the diocese chooses to spend.

> *"The Office of the Bishop needs to learn how to do more with less. There are some functions that can be done by consultants without having staff positions."*
>
> *"Stop building the budget from the top down and start building it from what the congregation base can actually sustain — then cut the diocese to fit."*

A Minority Caution Against Assuming Cuts Are the Answer

Set against this majority sentiment, a smaller but clear and consistent minority of respondents affirm the value of apportionment as it functions today or specifically warn that reducing it without a plan could reduce the diocese's capacity to support its most vulnerable congregations. This counternarrative is important to note because it complicates a simple "lower the amount" response to the majority view.

> *"The money problems of the churches will not be solved by reducing the apportionment. Even though we use limited resources from the diocese, we fully support the work the diocese does."*
>
> *"What is impactful is if the diocese has to reduce its operational capacity and financial support for mission churches as a result of the apportionment decrease."*
>
> *"Please keep in mind the help that small parishes now receive through grants and diocesan staff. It would not be helpful if the grants and personal assistance were cut back."*

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How Location and Size Shape the Apportionment Picture

By self-reported community setting, respondents describe their location as 33.1% rural, 29.8% suburban, and 13.7% urban, with the remainder not specified via checkbox.

Response option	n	% of respondents
Urban	17	13.7%
Suburban	37	29.8%
Rural	41	33.1%
Not specified via checkbox (described in free text or left blank)	32	25.8%

n = 124 responses

Segmenting the data by community setting (urban, suburban, rural) surfaces a pattern with respect to apportionment that reinforces the size-based finding above, since larger congregations skew urban and suburban. Urban congregations report the highest concern with overall apportionment amount (70.6%) and the highest rate of paid clergy (82.4%); rural congregations report the lowest concern with overall amount (42.1%) and the lowest rate of paid clergy (55.3%), consistent with rural congregations' greater reliance on part-time, supply, or volunteer clergy.

Setting	n responses	Overall amount a top challenge	Paid clergy
Urban	17	70.6%	82.4%
Suburban	34	50.0%	76.5%
Rural	38	42.1%	55.3%

When each of the diocese's 55 congregations is weighted equally — rather than weighting by the number of surveys a congregation happened to submit — the overall pattern holds, though the edges soften slightly: the church-weighted share citing overall amount as a top challenge is 46.1% (versus 51.6% response-weighted), and church-weighted rural representation rises from 33.1% to 42.7% of congregations, reflecting that rural congregations were somewhat less likely to submit multiple surveys per congregation than urban and suburban ones. This confirms the size- and setting-based patterns above are not an artifact of which congregations happened to respond more than once.

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How Perspectives Differ by Role

Restricting the data to the 57 surveys completed by a single respondent in one role only — 20 clergy, 24 senior wardens, and 13 treasurers — shows that all three roles diagnose the same underlying conditions but engage with them through different vantage points.

	Clergy (n=20)	Senior Warden (n=24)	Treasurer (n=13)
Primary lens	Mission and ministry capacity	Congregation and community	Financial mechanics and process
Apportionment framed mainly as	A competing claim on clergy time and a direct constraint on staffing	A fairness and predictability question	A line-item and calculation-accuracy question
Most detailed critique of	Diocesan convention logistics and communication	Feeling unseen by a one-size-fits-all approach	The TMR form's mechanics and formula
Most valued diocesan support	Individual pastoral relationships with Bishop's office staff	Vestry/warden-specific training	Direct help from the diocesan treasurer
Distinctive concern	Time diverted from mission by administration	Existential strain in the most fragile congregations	Whether the smallest congregations remain viable

Table reflects patterns observed among single-respondent surveys only; it is a qualitative summary of emphasis, not exclusivity.

Two points from this comparison are worth noting. First, senior wardens are markedly more likely than clergy or treasurers to defer apportionment questions to someone else entirely ("this would be better answered by the Treasurer and Rector") — meaning any communication strategy aimed at the full diocese may need to be simpler and more self-contained than communication aimed at clergy or treasurers. Second, treasurers raise a structural question that appears nowhere else as explicitly: whether the diocese should concentrate support on its strongest, fastest-growing congregations and openly ask whether some of its smallest, most financially strained congregations have reached the natural end of their mission — a minority view, but a distinctive one worth calling out.

> *"At some point, like responsible gardeners, we are going to have to look at our very small, struggling churches and recognize they have fulfilled their mission and it's time for them to close."*

It is worth noting what the three roles agree on, since consensus is arguably more actionable than differences.

- all three want the apportionment calculation simplified and made more predictable
- all three describe an aging membership and volunteer base as the central long-term challenge facing their congregation
- all three pair genuine appreciation for specific diocesan staff relationships with real frustration at slower or less reliable institutional processes and responsiveness

There are also some key differences. Clergy are more likely to frame apportionment and diocesan reporting requirements in terms of the time they consume, time that pulls them away from pastoral care, evangelism and

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program leadership. They are also most likely to name positions they had to eliminate, salary reductions or programmatic cuts when describing the impact of apportionment. Senior wardens ask for the same core changes clergy and treasurers ask for — simplification, predictability and a formula that accounts for congregations of different sizes — but tend to frame the request in terms of fairness and feeling understood by the diocese. Treasurers focus on the mechanics of calculating apportionment and their desire to revert back to the old form.

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Ministries & Diocesan Support: What's Working, What Isn't?

Across the survey's questions about specific diocesan ministries and programs, three named offerings draw consistently positive, essentially uncontested reactions

- Clergy Conference (valued for fellowship and peer connection)
- Episcopal Community Services (ECS) grants (repeatedly cited as useful, with no negative mentions)
- The diocesan bookkeeper/treasurer support service (praised everywhere it is used, with strong recurring requests to expand it further)

> *"Diocesan Bookkeeper–almost an essential support service for our church Treasurer and Bookkeeper."*

At the other end of the spectrum, four programs draw consistent, specific criticism. Diocesan Convention logistics — registration, check-in, scheduling, and voting procedure — are criticized more consistently than any other single program. Safe Church training's purpose is broadly accepted, but its administration and Live Scan background-check tracking are described as confusing and poorly communicated. The Racial Justice Audit and the Congregational Vitality Survey (FaithX) drew no positive comments and a handful of critical ones with most respondents not mentioning either program as worthwhile or valuable.

> *"Diocesan convention was very unorganized—from registration to schedule to voting."*
>
> *“The staff person in the Office of the Bishop has not responded to repeated emails asking for her to tell us who has done the Live Scan. This has taken up a lot of staff time trying to follow up and makes the Live Scan process useless because we cannot find out if people have done it or not. This is a repeated pattern of behavior which we have complained about to her supervisor multiple times and seen no change.”*
>
> *"The results of the Racial Justice Audit failed to indicate the work we have accomplished. The method proved ineffective, in my opinion."*
>
> *"We found the Congregational Vitality survey lacking and of no value."*
>
> *“Programs provide lifelines to churches but must be cost effective. A good gardener sees the future and prunes judiciously for new growth.”*

Caveat: given the size of the sample, these results should not been seen as a mandate to eliminate certain programs but rather an invitation to deeper consideration and discernment as to which programs are working well, which are not and which are of lower or no value to the congregations and why.

The Curacy Program Paradox

The Curacy Program, which subsidizes shared clergy positions for smaller congregations, is described positively wherever it is accessible — but several congregations report that even the subsidized financial contribution required to participate is more than they can absorb. A program built specifically to help the diocese's most financially strained congregations access shared clergy support is, in its current form, least accessible to some of those congregations.

> *"We wanted to apply to the curacy program as a sponsoring congregation, but we could not afford our share of the cost."*

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HR & Administrative Support: A Polarized Function

The HR/Administrative function in the Office of the Bishop generated 24 responses, more than any single named ministry program. The pattern, however, differs from the other programs discussed above. Praise for HR/Administrative support is real, but it tends to be brief (i.e., phrases and short sentences) or single issue focused, while the criticism is longer (i.e., multiple sentences or paragraphs), more specific and describes unresolved, recurring problems.

On the positive side, respondents cite the availability of staff to answer questions or help with leases, use agreements and benefits questions. But respondents describe, in far more lengthy answers, unanswered emails, repeated unresponsiveness, months-long delays, and the provision of missing or incorrect information as a source of keen, ongoing frustration.

> *"I appreciate Kati Braak's energy and enthusiasm."*
>
> *“Kati Braak has been helpful in the development of use agreements and leases that we need for the partnerships we are developing with outside agencies who will be co-occupants of our building.”*
>
> *“We would appreciate better responses from the diocese when questions or concerns are voiced. Please get back to us ASAP when you say you will. Our concern may not seem urgent to the diocese, but it is to us.”*
>
> *“There are moments when we ask ourselves, why are we paying a large apportionment and still have to hire a consultant. The Office of the Bishop needs to have the necessary expertise to advise parishes.”*
>
> *“We would like the Office of the Bishop (OOB) to focus on congregational development instead of new initiatives which are often distracting and extraneous. We also ask that the OOB work on customer service and HR leadership/resources in support of the efficiency and morale of our congregations.”*

Read together, these findings sharpen the Executive Summary's people/process distinction: unlike the diocesan treasurer, canon, and chancellor’s office, whose praise carries essentially no negative countersignal, the HR/administrative function shows a genuine split — and the negative comments carry more specific, escalated detail than the positive ones. A brief, generic "has been helpful" is not the same evidentiary weight as a specific, repeated or ongoing pattern of behavior.

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The Ministry Scorecard

The table below organizes responses by each ministry or program named in respondents' answers and includes the overall reaction (positive, mixed, negative) and a note as to why it is viewed that way.

Program	Overall Signal	Note
Clergy Conference	Consistently positive	Valued for fellowship and peer connection; a minority want a smaller-cohort format
Episcopal Community Services (ECS) grants	Consistently positive	No negative mentions found; repeatedly cited as directly useful
Diocesan Bookkeeper / Treasurer support	Consistently positive, high demand	Praised where used; recurring requests to expand it
Deanery / Clericus gatherings	Positive, high demand	Valued; multiple requests for more, smaller, regional gatherings
Disaster Preparedness / Project ReStart	Mostly positive	Valued overall; some logistics complaints and a recent lull noted
Sacred Ground / Racial Reconciliation	Mixed-positive	Valued but described by some as "getting stale"
Fresh Start	Mostly positive	Valued; timing conflicts with other new clergy requirements noted
Congregational Development (CCD)	Mixed	Valued by some for leadership development; called low value by others
Commission on the Environment / Carbon Neutral	Mixed	Valued in principle; goals seen as unrealistic for small congregations
Camp Living Waters / Pathways (youth)	Mixed, situational	Valued when a congregation has youth; the logistics are challenging (e.g., distance, transportation)
The Curacy Program	Valued in concept, inaccessible in practice	The clearest paradox in this data — see p. 12
Best Skills / Best Churches	Consistently criticized	Execution called weak; some attendees didn't find the content useful; cost cited as a barrier
Safe Church Training	Mandatory but consistently criticized	Valued in principle but the logistics, tracking and poor execution are repeatedly criticized
Diocesan Convention	Consistently criticized (logistics)	Valued as a gathering, the execution and logistics were criticized almost every time it's mentioned
Racial Justice Audit	Negatively reviewed	No positive mentions; criticized for failing to recognize work accomplished and workshops becoming stale
Congregational Vitality Survey / FaithX	Negatively reviewed	No positive mentions; respondents didn't find it to be worthwhile

A small group of respondents asked the diocese to evaluate, streamline and be more transparent about its offerings as well as avoid duplicating what is already happening at the local level.

> *"Given our apportionment pays for these ministries, we would like a more transparent decision-making system of how which ministries get funded and why."*

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Ministry Scorecards by Congregation Size: Where are the differences?

Four programs show the sharpest divergence based on congregation size.

The diocesan bookkeeper/treasurer support is consistently positive and in high demand among small congregations. Larger congregations appear to have their own internal resources and expertise.

The Commission on the Environment/Carbon Neutral initiative is consistently negative among small congregations, who find its goals unrealistic for older buildings and smaller budgets. Feedback is mixed among larger congregations.

The curacy program is valued where accessible, but medium congregations say the cost creates a barrier that makes the program inaccessible in practice . Several congregations said they wanted to participate and could not afford it.

Safe Church training is consistently criticized by small congregations based on the cost, confusion about what's required and the difficulty of tracking Live Scan completion status. Large congregations value the training itself but criticize the administration of Live Scan and express frustration about getting answers from diocesan staff.

With respect to Diocesan Convention, small churches cite cost and distance as barriers to attending while larger congregations point to frustrations with logistics and execution.

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Small Congregations (18 congregations)

Program	Overall Signal	Note
Clergy Conference	Consistently positive	Every evaluative comment was positive; valued for fellowship and disaster-recovery-era connection.
Episcopal Community Services (ECS) grants	Insufficient data	Listed as something engaged with, but no small congregation evaluated it directly.
Diocesan Bookkeeper / Treasurer support	Consistently positive, high demand	The most consistently praised support in this band — "almost essential," "excellent service for small churches" — but flagged as a limited, high-demand resource.
Deanery / Clericus gatherings	Positive	Valued for fellowship and mutual support among small congregation leaders.
Disaster Preparedness / Project ReStart	Mixed	Valued in concept and praised for past disaster recovery, but recent complaints about coordination lulls and bin-storage logistics.
Sacred Ground / Racial Reconciliation	Mixed	One respondent called it "awesome"; another called the trainings "pointless." Too little data to generalize.
Fresh Start	No data	No small congregation mentions found.
Congregational Development (CCD)	No data	Only one neutral listing; no evaluation found.
Commission on the Environment / Carbon Neutral	Consistently negative	The sharpest complaint of any program in this band: goals like solar conversion and carbon-neutral-by-2030 are called unrealistic for older buildings and small budgets, with little follow-through reported.
Camp Living Waters / Pathways (youth)	Positive, limited relevance	Valued where used, but few small congregations have youth to send.
The Curacy Program	Positive	The one small-congregation respondent using it credits it with making a priest-in-charge affordable.
Best Skills / Best Churches	Negative	Cost cited as a barrier to sending additional lay leaders.
Safe Church Training	Consistently negative	The most-criticized program in this band: called confusing, costly, hard to track, and of doubtful value.
Diocesan Convention	Mixed	Cost and distance — not logistics — are the main barrier small congregations cite.
Racial Justice Audit	No data	No small congregation mentions found.
Congregational Vitality Survey / FaithX	No data	No small congregation mentions found.

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Medium Congregations (18 congregations)

Program	Overall Signal	Note
Clergy Conference	Positive	Valued for fellowship; one respondent flagged the registration fee as a cost barrier.
Episcopal Community Services (ECS) grants	Positive	Credited with directly supporting mission and values through grants.
Diocesan Bookkeeper / Treasurer support	No data	Listed but not evaluated by medium congregations.
Deanery / Clericus gatherings	No clear signal	Mentioned mainly as the vehicle for other trainings; not evaluated on its own.
Disaster Preparedness / Project ReStart	Positive	Praised for hands-on help during local fires.
Sacred Ground / Racial Reconciliation	Neutral	No direct praise or criticism of the content; one respondent named it as part of an overwhelming first-year workload for a new rector.
Fresh Start	Mixed	Same first year workload complaint as Sacred Ground; not criticized on its own merits.
Congregational Development (CCD)	Negative	"Required way too much commitment and not of a lot of value."
Commission on the Environment / Carbon Neutral	Negative	Participation stalled after the lead volunteer moved away; larger changes (e.g., solar) seen as out of reach.
Camp Living Waters / Pathways (youth)	Mixed	Valued when accessible, but turnover in the diocesan point of contact caused unanswered questions and falling participation; several congregations have no youth to send.
The Curacy Program	Negative	The clearest pain point in this band: two respondents wanted to participate — as recipient or sponsor — but could not afford the required contribution even when subsidized.
Best Skills / Best Churches	Negative	Folded into the same first-year-overload complaint as Sacred Ground and Fresh Start.
Safe Church Training	Negative	No positive mentions found; the complaint is the administrative burden of stacking background-check and training requirements into a single ask.
Diocesan Convention	No clear signal	Only neutral listings; no direct evaluation found.
Racial Justice Audit	No data	No medium congregation mentions found.
Congregational Vitality Survey / FaithX	Negative	Both mentions in this band named it directly as not meeting expectations.

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Large Congregations (19 congregations)

Program	Overall Signal	Note
Clergy Conference	Consistently positive	The most positively and frequently cited program in this band; named worth keeping even by respondents who want to cut other diocesan initiatives.
Episcopal Community Services (ECS) grants	Positive	Called "very helpful"; no negative mentions.
Diocesan Bookkeeper / Treasurer support	Not used / not needed	The one mention lists it among programs not engaged with, consistent with large congregations having their own bookkeeping capacity.
Deanery / Clericus gatherings	Positive, format questioned	Valued for connection, but at least one respondent wants smaller, more focused cohort gatherings rather than large, mixed-background groups.
Disaster Preparedness / Project ReStart	Mostly positive	Valued and financially supported, though the same bin-storage logistics limitation noted by small congregations affects some large churches too.
Sacred Ground / Racial Reconciliation	Mixed-positive	The most frequently praised program in this band, but multiple respondents say the required repeat trainings are "getting stale" and need new material.
Fresh Start	Positive	Limited data, but the one direct mention is positive.
Congregational Development (CCD)	Positive (historical)	Valued as more substantive than Best Skills/Best Churches; several respondents want it to return even though it is not currently offered.
Commission on the Environment / Carbon Neutral	Mixed	Valued in principle and for its educational role. Complaints about being pressured over unaffordable upgrades after an energy audit &meeting frequency.
Camp Living Waters / Pathways (youth)	Mixed	Valued where used, but logistics and last-minute planning criticized.
The Curacy Program	Mixed	Valued in concept, but even large congregations cite the financial contribution as a barrier, and one respondent is "wary of the diocesan office's ability to administer this program."
Best Skills / Best Churches	Consistently criticized	The clearest negative signal in this band: content called oversimplified, format "less impactful," execution "not well executed."
Safe Church Training	Mixed	More positive mentions than negative — the training is valued, but detailed complaints about Live Scan administration and diocesan staff responsiveness.
Diocesan Convention	Consistently criticized (logistics)	The most-criticized program in this band. Registration, scheduling, voting, and speaker relevance drew repeated complaints, even as several respondents still value it as a gathering.
Racial Justice Audit	Consistently negative	Criticized for failing to recognize work accomplished and workshops becoming stale
Congregational Vitality Survey / FaithX	Negative	Both mentions call it "not worthwhile" or "lacking… value."

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Key Takeaways

Bringing the quantitative and qualitative findings together, five points stand out as most directly relevant to the work going forward.

Any formula change should solve two different problems, not one.

Small congregations need clarity; medium and large congregations need relief on the amount. A single change aimed only at the dollar figure will not address the confusion driving small congregations' concerns, and a single change aimed only at demystifying the calculation will not satisfy larger congregations' concern about the size of the payment itself.

The income-versus-expense objection is close to a consensus position.

This is the most specific, most repeated, most technically detailed piece of advice in the entire dataset, raised independently by clergy, wardens, and treasurers alike, and echoed in the quantitative finding that cash-flow impact and understanding of the calculation are both top challenges.

Diocesan overhead reduction is not a peripheral request — it is one of the two dominant asks.

Respondents consistently frame this as a matter of proportionality and shared sacrifice, not hostility toward the diocese. Several respondents who are otherwise positive about the diocese's work still raise this point, suggesting it functions as a precondition for trust in any apportionment reform.

All diocesan programs warrant direct review along with the HR and administrative support provided by the Office of the Bishop.

Several programs received no positive mentions. The Curacy Program needs its cost structure redesigned. The frustration with certain diocesan staff centered around a lack of responsiveness, the provision of inconsistent or inaccurate information and a feeling that the parishes are being left to shoulder (and in some cases pay for) the HR/employment law risk the diocese is better positioned to carry.

Communication should be tailored by audience, not one-size-fits-all.

Clergy engage with canon-level and mission-strategic detail; treasurers engage with line-item mechanics; senior wardens with the impact on membership and volunteers. A single explanatory document pitched at one of these levels will underserve the other two audiences.

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The Twelve Cross-Cutting Themes

A reading of all the responses to the 27 open-ended questions reveals twelve themes that recur throughout the survey regardless of which individual question prompted them — a stronger signal of what matters most to respondents than any single question taken in isolation.

1. Aging Congregations & Generational Transition — the most frequently mentioned condition in the survey, it surfaced across nearly every open-ended question, often coupled with a comment about the inability of newer, younger members to give at the same level.

> *"We are losing our aging parishioners, and they provide a large fraction of our financial support."*
>
> *"The church has grown by nearly 20% in the last year. Many of our older and more financially stable members have passed away and the newer members are often younger and have less financial means. At the same time, expenses (insurance, utilities, etc.) are rising and doing just what we were doing before costs more."*

2. Volunteer Capacity & Leadership Burnout — a small core of volunteers carries governance, ministry, and financial administration together.

> *"Participation is difficult due to burnout of the same people doing things & an older congregation."*
>
> *"We are a very active congregation with many wonderful ministries, but our staff is stretched thin to support them."*
>
> *"More parishioners would make a big difference. Plate and pledge offerings have tapered off since COVID, along with membership. There are some terrific people in leadership, but most of them have been giving their time and talents for a long time, and there are not enough members "waiting in the wings" to start preparing to rotate in as new leaders, let alone to fully engage with current ministries or start new ones."*

3. Small & Rural Congregations Feel Sized Out and Misunderstood — forms, programs, and expectations are frequently described as built for larger, better-staffed parishes.

> *"It's not a one size fits all, or even one chart fits all. Each and every church or mission has unique needs and strengths."*
>
> *"Local churches is where the ministry is often taking place. So, it is not about what the diocese can provide, but how can the diocese not make it more difficult for local churches to do the work they are called to do."*
>
> *"We are in a rural community. Hours away from Sacramento. It is hard to feel connected to the community with the physical distance and the messages that are received that don't seem to understand or reflect our situation. We often feel disconnected with expectations, thoughts about expansion and generally wonder if the greater diocese understands or even knows our situation."*

4. Structural Deficits & Reliance on Reserves — a substantial number of congregations run deficits as a matter of course instead of experiencing them as an occasional setback.

> *"We're operating at a deficit that can only be sustained for so long."*
>
> *"We are running at a $20,000 to $30,000 annual deficit budget, even though we have a barebones budget. We use our savings to balance the budget."*
>
> *"The amount we pay in apportionment is a huge strain on the church's finances and is the reason we have been operating at a deficit in the past few years, requiring us to take significant amounts from our reserves each year. This is unsustainable and presents a serious issue for our present and future financial and missional life."*

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5. The Apportionment Amount's Basis in Expenses, Not Income — the desire to have apportionment calculated based on income instead of expenses is the single most common financial grievance in the survey, described by many as a "tax on a tax."

> *"Assess excess income when it is put into reserves to begin with (when a church is flush enough to add to their reserves) and not when they are withdrawn (usually at a moment of financial peril)."*
>
> *"…we pay apportionment on apportionment. That needs to change."*

6. Valued Diocesan Staff, Alongside Systemic Frustration — individual staff are praised specifically and repeatedly even as the systems around them draw frustration.

> *"The focus of this survey seems to be on the value of the various programs offered by the Office of the Bishop. We request that there be a thorough investigation of the ways the office might provide more effective administrative support, especially in areas requiring specialized knowledge and where the risks of getting things wrong are significant."*
>
> *"I regularly get mixed or no communication from the diocesan staff. Yearly, I receive an email saying I have not turned in the forms required when they have already been mailed in."*
>
> *"John Nycamp has been amazing helping with our accounting problems." "I appreciate how calm and nonjudgemental he is."*
>
> *"I appreciate Jacqi Seppi's responsiveness and competence a lot, especially around episcopal visitations, as well as her long history with EDNC."*

7. The Curacy Program Paradox — a program built to help the diocese's most financially strained congregations access shared clergy is, in its current form, least accessible to those congregations.

> *"We wanted to apply to the curacy program as a sponsoring congregation, but we could not afford our share of the cost."*
>
> *"A program designed in part to support smaller congregations, and new clergy was inaccessible to us precisely because of the financial strain that makes us candidates for apportionment relief in the first place."*

8. Calls to Simplify & Right-Size the Diocesan Structure — a recurring, largely unprompted request that appears to stem from a desire for diocesan overhead to track the same downward trend congregations are managing locally.

> *"The Office of the Bishop needs to learn how to do more with less. There are some functions that can be done by consultants without having staff positions."*
>
> *"We are happy to support the work of God on a diocesan level, but the ask is too high. We understand that a change in how much is given to the diocese means changes in staffing, but that is what we are facing on the ground as well."*
>
> *"Stop building the budget from the top down and start building it from what the congregation base can actually sustain — then cut the diocese to fit."*

9. Grants & Capital Cost-Sharing are Concretely Valued — specific diocesan grants are cited by name with real gratitude for the tangible, effective support.

> *"The grant for our project has gone a long way to show that the Office of the Bishop supports our dream."*
>
> *"The most helpful has been the co-sponsorship of much-needed repairs."*

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10. A Desire for Lateral Connection Between Congregations — multiple respondents ask for more peer-to-peer sharing among similar congregations, not just top-down programming.

> *"Ready-to-use templates and opportunities for peer learning can help congregations strengthen ministry without recreating systems independently."*
>
> *"I would like to see the diocese reorient its ministry to support what is going on locally rather than offer its own ministries. Where local churches are doing something well, help bring it to the attention of the wider diocese."*

11. Community-Facing Ministry is Where Hope Lives — daycare programs, cafes, meal ministries, and gardens are the clearest bright spots in the survey.

> *"We now have hundreds of people a week on our property for the café and for music classes … we have so much opportunity to build relationships and trust and engage further with our community."*
>
> *"Nearly every time I have conversations with folks on our property, they either express interest in attending church, express their gratitude and love for this place, or share with me about their own spiritual journey."*

12. Goodwill & Gratitude Toward the MAP Process Itself — despite substantial frustration on specific points, many respondents close with explicit thanks for being asked to share their thoughts and perspective.

> *"Thank you for doing this work and especially for seeking feedback from every congregation in our diocese."*
>
> *"We appreciate this process and pray for change."*
>
> *“As a committed Episcopalian, I appreciate the Diocese has offered this survey. In particular, I applaud your interest in ‘seeking to better understand the lived realities of our congregations and our leader.’”*

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