

# MSP Task Force Report

**Final Report of the Mission Share Task Force  
Presented to the 42<sup>nd</sup> Convention of the  
Episcopal Diocese of San Diego  
November 7, 2015  
Prepared by: The Mission Share Task Force**

## **1.0 Introduction**

At our Diocesan Convention in February 2014, convention delegates enacted a resolution brought forward by the Mission Pledge Stewardship Committee. Resolution 14-01 enacted by convention reads as follows:

*Resolved that the 40<sup>th</sup> Convention of the Episcopal Diocese of San Diego authorize the establishment of a commission to be appointed by the Bishop to study and evaluate Mission Share Pledges of churches in this diocese as they relate to the diocesan budget and report with recommendations to Convention 2015.*

The Mission Share Pledge (MSP) Task Force was commissioned by Bishop Mathes the following July. Six clergy and four laypersons began the task of evaluating our current Mission Share Pledge strategy, researching Mission Share Pledge strategies of other dioceses, and soliciting input regarding the understanding of Mission Share Pledge from lay and clergy within our diocese. As the committee considered specific areas of research, it became clear the work would not be completed by the February 2015 Convention. Consequently, an extension was requested and received to complete the work by and report at the November Convention.

During the last two years, the MSP task force met to discern what modifications might be made to our current Mission Share Pledge requirement and how participation in the diocese might be strengthened so that we all work together as a diocese to spread the Kingdom of God and to support each other as the Body of Christ.

The Task Force engaged in conversations about the theological rationale of the Mission Share Pledge, an assessment of the diocesan understanding of Mission Share Pledge, evaluation of various Mission Share Pledge Strategies throughout the Episcopal Church, and the need for greater communication and participation of parishes in the missions and ministries of the diocese as a whole. Our work is organized in the following four categories:

**Charity within Community** –the theological rationale for giving that originated in the Old Testament and continued through the Acts of the Apostles clearly informs us of the duty of all Christian communities, to share all things in common.

**Survey Results** – assessing the current understanding of Mission Share Pledge began with an eight-question survey sent out to all church rectors/vicars and wardens in the Diocese to learn what they knew about the diocesan budget, their idea of the Mission Share Pledge, programs that needed funding, and suggestions for changes to the current pledge percentage. Data from the survey pointed out the need for more dialogue between the diocese and the individual church and between neighboring churches.

**Rationale for the New Formula and New Name** – the financial research included the income and expense side of our own diocesan budget, as well as the assessment formulas from dioceses across the country. These formulae ranged from fixed/multi-tiered formula to voluntary rates, to added assessments

applied toward endowment funds. With the findings of the theological rationale and our survey to the churches, we came to the conclusion that we needed a new formula and a new name for the Mission Share Pledge.

**Strengthening a Diocesan Identity** – the final piece is understanding that financial support is an essential part of our life together as a Diocese. To strengthen this understanding, suggestions for sharing the vision, sharing the mission and serving in mutual support are included.

This report concludes with a resolution drafted by the MSP Task Force for consideration at the 42nd Diocesan Convention in November 2015.

## **2.0 Theological Rationale for Diocesan Giving: *Charity within Community***

Saint Teresa of Avila has been quoted to say, “Christ has no body now but yours.” As the Episcopal Diocese of San Diego, how are we the body of Christ? How does our shared ministry also affect our mutual financial commitment to be the body of Christ?

The Catechism in the Book of Common Prayer asks the following questions.

What is the Church?

Answer: The Church is the community of the New Covenant.

Through whom does the Church carry out its mission?

Answer: The Church carries out its mission through the ministry of all its members.

What is the duty of all Christians?

Answer: The duty is to follow Christ; to come together week by week for corporate worship; and to work, pray, and give for the spread of the Kingdom of God.

This catechetical framework has its origins in the people of the Hebrew Scriptures (Old Testament), through the Day of Pentecost in the Book of Acts, and beyond.

Eight hundred years before the birth of Jesus, the Temple of Solomon stood as the focal point of the entire Israelite community. It was the symbol and sign of the reign of God in their midst and it served as a reminder that the surrounding land had been promised to them by God. The natural and communal response in thanks for the land and the presence of God was to give the first fruit of the land to the Temple. Observant followers also attended Temple festivals. During those celebrations, offerings were given in thanks to the living and giving God. Lastly, the faithful were called on to give alms for the poor and to care for resident aliens because they too were once aliens in the land.

Shortly after the Day of Pentecost, the early Christian community gathered all they had and shared and distributed to any who had need. (Acts 2:44) Nearly a generation later, communal giving and sharing was still going on. Saint Paul wrote to the community in Rome and informed them that communities in Macedonia and Achaia had shared their resources with the community in Jerusalem. He said they had been pleased to share and indeed owed it to them to do so. (Romans 15:26, 27)

The first American Bishop, Samuel Seabury, believed God designed the world in a manner that its proper functioning required individual and corporate self-giving on a constant basis. As Seabury understood the world, it was ordered to enable charity within community. (One Catholic, and Apostolic, Marshall, Church Publishing, pg. 74)

In the 21<sup>st</sup> century, Episcopalians are living into the very same call to free giving exemplified by the Israelites as they supported the Temple and the early Christian communities who supported one another through prayer and offerings. We are living Bishop Seabury’s example of enabling charity within community through the call to congregations to support and nurture one another, through our shared diocesan work and diocesan budget that continues the episcopate, our central identity and ecclesiology,

which lead and cultivate our spirituality and outward lives of faith. Seabury's "charity" within our Episcopal community is also one of common prayer, shared resources like the Diocesan Service Coalition and diocesan youth, and financial support to needy congregations, seminary support, and in the governance of our diocese.

Not unlike the early Israelite community, which saw the Temple as the focal point of their spiritual life, we see the diocese as our shared hands resembling the very hands of Christ. As our catechism states, our united duty is to work, pray, and give for the spread of the Kingdom of God And to that end, our duty is charity to God and to the Church to share all things in common.

### **3.0 Survey of Parish and Mission Churches of the Episcopal Diocese of San Diego on the subject of Mission Share**

In mid-November 2014, a questionnaire was distributed electronically by the Mission Share Task Force to all congregations in the Episcopal Diocese of San Diego to gain a sense of how Mission Share is perceived throughout the Diocese. A total of 57 responses were received, but only about 44 completed the entire survey. This lower number represents about one-third of the 150 potential responses. The questionnaire included eight questions: Six were open-ended questions concerning the respondent's views on various aspects of Mission Share, and two were "demographic" questions to identify the location of the respondent within the Diocese and whether the respondent was lay or ordained.

A more complete analysis of the survey responses is provided in Appendix A and the complete set of responses and comments are available upon request. In brief, the following observations can be made regarding how Mission Share is perceived at the parish level:

1. About twice as many respondents consider Mission Share to be a parish-level obligation as compared to those who view it as support for diocesan mission. Some responses referred to the Diocese using the terms "they" and "their", which suggests that the Diocese is seen as separate from the parish point-of-view.
2. Most people learn about the diocesan budget and spending at the Convention, though many also receive information through the diocesan newsletter and other publications, and some identified various committees on which they serve (including their local Vestry) as sources of information. However, the largest response group stated that they do not recall receiving information about Diocesan budget and spending. From many of the comments, it appears that the communication links between the diocesan office and parishes about diocesan spending need strengthening.
3. Most respondents could not identify what diocesan programs should receive more financial support. Many could not identify the programs, while others believed that more information on program effectiveness would be needed to answer the question. For those who provided a response, many programs were listed as warranting additional support, especially youth and campus ministries, outreach and evangelism, parish and mission support. Only a few identified programs that should receive less funding, including central staff and unviable congregations.
4. A significant majority considered a level of ten percent (or less) to be a reasonable percentage of parish income to share with the diocese. Of these, most stated ten percent, while some identified amounts as low as five percent. Others offered percentage amounts ranging from 10 to 15 percent. To support their response, many respondents cited their own parish's giving pattern, or referenced the traditional tithing amount.
5. When allowed to suggest changes to the current Mission Share formula, a variety of responses were offered, including modifications to how the formula is applied (exclude long-term debt, for

example) or using a “sliding scale”. There was also concern expressed about the challenge of using two-year old data that may be too old to reflect a parish’s current conditions. Several comments raised the need for flexibility in response to local circumstances, especially regarding mission churches. Lastly, a few respondents suggested allowing parishes to make direct pledges to particular missions of the diocese.

6. In finding a role for the diocese to strengthen one’s own parish, many respondents identified specific, favored diocesan programs (Future Church, youth ministry, Leadership Academy, among others). Several others stated a need for closer communications, networking, and idea-sharing among parishes and between parishes and the diocese. There was also expressed a perception that there are inefficiencies within the diocese as a whole that could be reduced through greater cooperation, streamlining of decision-making and sharing of best practices.
7. The two demographic questions revealed that most respondents came from Diocesan Areas 1, 4, 5 and 6; and that slightly less than 3 out of 4 of the respondents were lay and a little more than one quarter were ordained.

## **4.0 MSP Taskforce Rationale: A “Common Life Share” Pledge of 10.5%**

### **4.1 What problem are we trying to solve?**

Alternatives to the *status quo* cannot be assessed without naming the problems we seek to solve. The current “10% minimum/20% desired” statement does not give sufficient guidance to congregations about how to provide a fair share toward the expenses of the diocese. Both pieces of the standard are flawed. The 10% minimum can give comfort to a congregation with sufficient resources to give more. The “20% desired” part of the standard can encourage those who take it seriously to starve local ministries unduly.

Statistical analysis suggests that to some extent both are happening, even though no one is near the 20% desired. Overall, MSP commitments for 2014 represent 10.45% of NDI. The nine congregations serving communities with average household incomes over \$100,000 are collectively at 10.37%. (This computation excludes St. Timothy’s, San Diego from that group, since it has faced special challenges leading to a 7.38% MSP this year, which could skew the group percentage down a bit.) Obviously, this means those serving the remaining communities are collectively giving at a higher rate, namely, 10.5%. (This number *includes* seven congregations unable to reach 10% currently; their exclusion would bring the average for the others up even higher.) These results seem to be backwards from what fairness would dictate.

Since representatives of the largest and financially strongest congregations of the diocese took the floor at convention to pledge their commitment to sharing, this upside down MSP result warrants attention.

### **4.2 Formula Options:**

Many other dioceses use some form of graduated system, with income up to a set level treated differently than income above that level. This recognizes that a given sum is needed for core operational costs for any congregation with a building and a priest. Some dioceses have multiple levels with different suggested percentages. Two factors counsel against crafting a tier system: 1) complexity in administration and 2) messaging—such systems do not enhance our sense of equally shared stake in a common enterprise. Nonetheless, we have looked at the particulars of graduated systems to assess their utility for EDSD.

The Diocese of El Camino Real adopted a formula in 2006 calling for 10% of NDI up to \$178,000, and 20% of anything above that number. A jump this dramatic would not be advisable for EDSD. This formula would nearly double the MSP of congregations such as St. Margaret's and St. Paul's Cathedral. No case has been made for shifting resources so substantially to central deployment. Indeed, it is more logical to suppose that each community is better able to fund local ministry strategically with knowledge of local needs and opportunities.

A less extreme graduated system is possible. The Taskforce analyzed a possible system with the first \$25,000 of NDI multiplied times 5% to begin the MSP calculation. To guard against any decline in total MSP receipts with this beginning point, the MSP rate for congregational NDI above \$25,000 would need to be 11% (%10.88, to come out exactly the same).

The NDI level at which this computation ceases to afford an advantage over 10% across the board is \$150,000. Thus it arguably addresses the challenge smaller congregations have in meeting core operating costs. However, the following observation counsels against its adoption: Of the 16 congregations with NDI below \$150,000 (excluding St. John's Fallbrook, which is right at the break point), 7 are currently contributing above the 10% minimum. It does not appear that there is a hue and cry to build a system specifically around the needs of this whole group. Five of the seven congregations currently unable to contribute 10% of NDI are in this group, but their circumstances might be best addressed individually rather than through a systemic change, given the wide disparity within the group. A graduated system affording relief through a number higher than \$25,000 could be considered, but that would necessitate building in a rate well over 11% for NDI above that number to prevent adverse revenue consequences. Such would significantly boost the MSP of larger congregations.

A very simple, non-graduated approach better addresses the identified problems. Since current MSP is just less than 10.5% of collective NDI, 10.5% could be made the minimum, with some guidance to help congregations assess whether their comparative blessings warrant an upward adjustment. This system would include four components:

1. The minimum "Common Life Share" is 10.5% of NDI.
2. All congregations are encouraged to keep their "Common Life Share" at no less than current MSP levels, which reflect some discernment about ability to contribute.
3. When setting CLS, congregations should intentionally consider their relative financial blessings and adjust upward by .5 to 1% or more, as warranted.
4. The Executive Council will invite congregations making a CLS greater than 10.5% into conversation to determine the use of the surplus CLS.

#### **4.3 Consequences of 10.5% option**

29 congregations would experience at least some increase in their MSP (before application of step 3). Seven of those are congregations not making the current minimum. Of the remaining 22, the increase for 10 would be under \$1,000. Of the 12 with an increase to their minimum MSP greater than \$1,000, five are in communities with an average household income over \$90,000. Adoption of this system would give better guidance and lead to more equitable participation in "Common Life Share."

### **5.0 Strengthening a Diocesan Identity**

As our new name for congregational financial support of the diocese, "Common Life Share," implies, we understand that financial support is an essential part of our life together as a diocese. But this understanding remains only a theory if the leaders of congregations do not share it. With that in mind, we make the following suggestions for communicating and strengthening diocesan identity.

## **5.1 Share the Vision**

- Publicize Diocesan mission priorities by promoting the current goals and achievements of the Diocesan Strategic Plan through all communication means.
- Make the Diocesan Strategic Plan and other diocesan mission priorities prominent on the website.
- Make the current diocesan budget and balance sheet available on the diocesan website.
- Demonstrate transparency about all diocesan finances, including the expenditures of capital and special funds.
- Use the categories of the Diocesan Mission Plan to show how diocesan spending supports the mission.
- Adjust Diocesan Mission Plan as needed to integrate new projects such as Future Church and Area Missions, creating one vision of priorities.
- Use diocesan communications (*Messenger*, e-mails, blogs) to tell stories of ministries and mission, highlighting how financial giving makes them possible.
- Communicate on a regular basis how the diocesan budget is being spent and supported.
- Communicate decisions made by Council and other diocesan bodies that affect priorities in mission.

## **5.2 Share the Mission**

- Engage all diocesan stakeholders (clergy, vestries, delegates, congregational leaders, as well as members of diocesan boards) in the process of creating the budget. This could be done by asking for feedback about diocesan priorities via workshop conversations or online surveys prior to the budget process.
- Host workshops on the budget well ahead of diocesan convention for the purpose of explaining priorities and getting buy-in.
- Identify particular diocesan ministries that could be funded by congregational giving beyond the required 10.5%. Share specific financial needs. Create a speakers bureau of Diocesan Council members and ministry leaders to speak to interested vestries about giving at a higher rate and what their gifts would fund.
- Create ownership of diocesan priorities and ministries by inviting congregations giving beyond 10.5% share into dialog with Executive Council to determine the use of the surplus.

## **5.3 Serve in Mutual Support**

- Develop stronger links between diocesan staff, clergy, and congregations in support of our shared and individual ministries.
- Publish information about staff responsibilities: who can help with what issues.
- Communicate decisions made by diocesan bodies that impact congregations.
- Use website to make connections between ministry needs and relevant staff.
- Schedule visits by diocesan staff to vestry meetings in order to communicate what the staff can do.
- Tell stories in the diocesan *Messenger* and e-mails about the work of staff members and how that work has supported the ministries of particular congregations.
- Create systems so that diocesan staff can help Area Missioners and Area Missions.
- Create systems for Area Missioners to receive support, training, and share ideas with each other.
- Receive feedback on Area Missions from participants to strengthen the program.
- Demonstrate gratitude.

## 6.0 Resolution to the 42<sup>nd</sup> Convention of the Episcopal Diocese of San Diego

### RESOLUTION 15.2-01

THE EPISCOPAL DIOCESE OF SAN DIEGO  
42<sup>nd</sup> ANNUAL DIOCESAN CONVENTION, November 7, 2015

**Title:** Amend Title IV, Canon 2.03 – Pledge and Payment of Diocesan Contribution

**Proposed By:** The Rev. Joseph Dirbas and the Mission Share Pledge Task Force

**Name, Address, Phone Number of Delegate:** 1475 Catalina Blvd, San Diego, CA 92107; 619-223-6394

**Date:** August 13, 2015

**RESOLVED:** That Title IV, Canon 2.03 of The Canons of The Episcopal Diocese of San Diego be amended to read as follows:

2.03 **Pledge and Payment of Diocesan Contribution.** Each congregation is expected to pledge and contribute to The Diocesan Fund, as the minimum mandatory level of giving, ten and one half percent (10.5%) of its Net Disposable Income. ~~as the target level of giving, twenty percent (20%) of its Net Disposal Income, and each congregation is required to pledge and contribute to the Diocesan Fund, as the minimum mandatory level of giving, ten percent (10%) of its Net Disposable Income.~~ Congregations are encouraged to contribute greater than ten and one half percent (10.5%) to the Diocesan Fund. Each congregation contributing greater than the minimum mandatory pledge can, in consultation with a subcommittee of executive council, designate a destination of their contribution above the mandatory minimum. Any congregation proposing to pledge less than the mandatory ten and one half percent (10.5%) of Net Disposable Income may, before submitting its pledge, seek a waiver from the Committee on Financial Review, as approved by the Bishop, of the minimum required pledge amount. Unless another payment schedule is arranged with the approval of the Bishop, the congregation shall pay its Diocesan contribution to the Treasurer of the Diocese in 12 equal installments, remittance to be made no later than the 15th of each month. For purposes of representation at Convention, a congregation will be deemed to have met its "Minimum Diocesan Contribution" only when the congregation has both (i) actually paid to the Diocesan Fund at least ten and one half percent (10.5%) of its Net Disposable Income for the second year immediately preceding the year in which the Convention is held, and (ii) pledged at least ten and one half percent (10.5%) of its Net Disposable Income as reported in its parochial report for the year immediately preceding the year in which the Convention is held. "Net Disposable Income," for purposes of this Canon, means a congregation's unrestricted income, as determined in accordance with guidelines from time to time by the Diocesan Executive Council.

**BE IT FURTHER RESOLVED:** that this 42<sup>nd</sup> convention of The Episcopal Diocese of San Diego endorse the phrase "Common Life Share" to replace "Mission Share Pledge."

**BE IT FURTHER RESOLVED:** That this 42<sup>nd</sup> convention request the bishop and the Executive Council, in following the recommendations for "Strengthening the Diocesan Identity" as submitted in the Mission Share Pledge Task Force final report:

- 1) Report to the diocese, each quarter, on diocesan budget expenditures and identify how the expenditures support Diocesan Mission Priorities
- 2) Report to the diocese, each quarter, on ministry and mission successes and how those successes are supported by Common Life Share giving
- 3) Conduct an on-line diocesan-wide budget workshop to explain the budget and its priorities at least three weeks before Diocesan Convention
- 4) Identify specific Diocesan Ministries that could be funded by congregational giving beyond the mandatory 10.5% when requesting the Common Life Share pledge.

## **6.1 Explanation of Resolution:**

The Mission Share Pledge Task Force has convened over the last two years. In summary, the task force determined that the current diocesan request for Mission Share Pledge (MSP) (a requested 20% of Net Disposable Income (NDI) from all congregations with a minimum of 10% NDI for representation at diocesan convention) has not worked effectively. The current system has not inspired congregations to give more than the minimum 10%. It has also created difficulty for the diocese in its budget process as the diocese is unable to accurately project income from congregation mission share pledges. The MSP Task Force also determined that there is a lack in understanding of what the Mission Share Pledge is and how it is actually used by the diocese. Additionally, the MSP Task Force determined that there are several parishes that would gladly contribute to our diocesan life above any minimum assessment (as they are able) to assist with diocesan ministry (as evidenced by the response from clergy of several larger parishes at our February 2015 Diocesan Convention).

In response, and after much prayerful consideration and conversation, the MSP Task force recommends:

- 1) Changing the name of the Mission Share Pledge to Common Life Share (CLS) more accurately projecting the goal of this offering. As we are a church of Common Prayer, so also are we a church which pledges our resources for the sake of our Common Life.
- 2) Eliminating the current diocesan mission share policy and replacing it with a 10.5% of NDI Common Life Share. All congregations will be required to give 10.5% of their NDI in order to receive representation at Diocesan Convention. (Based upon analysis the Mission Share Task Force, the 10.5% NDI is expected to be revenue neutral.)
- 3) Encouraging congregations who currently give more than 10.5% of their NDI as their Common Life Share to continue to do so and also requests that other congregations prayerfully consider the opportunity to pledge an amount greater than 10.5% NDI. The Executive Council will invite congregations making a CLS greater than 10.5% into conversation to determine the use of the surplus CLS.
- 4) Taking steps in our community toward communicating and strengthening our diocesan identity including increased transparency, engaging all stakeholders in the budget process, and developing stronger links between diocesan staff, clergy, and congregations in support of our shared and individual ministries.

The MSP Task force believes that these changes enhance our diocesan sense of purpose and mission and invites congregations to approach their CLS as a pledge as opposed to an assessment. The change from 10% minimum to 10.5% minimum from all congregations is a small impact on congregation's budgets. In addition, the MSP task force believes that our diocese is strengthened by inviting parishes pledging above the diocesan requirement to be involved in conversations of mission and ministry.

## **7.0 Conclusion and Acknowledgements**

The Mission Share Task Force undertook this work in a collegial and prayerful environment. Our objective was to address the current Mission Share Pledge structure and suggest modifications that would strengthen our diocesan life and result in suggested formulation that would be revenue neutral to the diocese. Our work here has resulted in a resolution to change our diocesan canons to reflect new requirements for Common Life Share pledges. However, we also recognize that the work toward a greater diocesan understanding of our Common Life Share and strengthening our diocesan identity does not end here. Rather, this change to our canons is a beginning to our diocese becoming united in mission as we seek to do God's will in San Diego, Riverside, Imperial, and Yuma Counties.

The work completed herein could not have been achieved without the dedication of the members of the Mission Share Task Force. Each member of this committee dedicated significant time and effort in completing our work together. Specifically,



The Rev. Joseph Dirbas, Co-Chair,  
Ms. Donna Watson, Co-Chair,  
The Very Rev. Penelope Bridges,  
The Rev. Meg Decker,  
Mr. Craig Ewing,  
The Rev. Edward Hulbert,  
The Rev. Kathleen Kelly,  
The Rev. Dave Marshall,  
Ms. Erin Sacco Pineda,  
and Mr. Allen Sweet.

Of these, the co-chairs offer special thanks to The Very Rev. Penelope Bridges, the Rev. Meg Decker, Mr. Craig Ewing, The Rev. Kathleen Kelly, The Rev. David Marshall, and Mr. Allen Sweet for their contributions to this final report.

In addition, members of Diocesan Staff were instrumental in gathering data for our analysis and assisting our work together including:

Ms. Bobbi Hoff,  
Ms. Hannah Wilder,  
and Ms. Julie Young.

Finally, the Co-chairs of this committee would like to extend their deepest gratitude for the atmosphere of collegiality and common purpose, and the friendships made or strengthened as a result of our work together.

## Appendix A

### Analysis of Survey of Parish and Mission Churches of the Episcopal Diocese of San Diego on the subject of Mission Share

Overview. In mid-November 2014, a questionnaire was distributed electronically by the Mission Share Task Force (MSTF) to all parishes in the Episcopal Diocese of San Diego to gain a sense of how Mission Share is perceived throughout the diocese. Instructions included a request that both lay and ordained leadership of the parish individually complete the survey. Assuming 47 parish / mission churches in the diocese and at least three leaders per church (rector, senior warden and junior warden – or equivalent positions) a total of at least 150 responses was possible. This would be the universe of respondents. The instructions also included a request that the survey be returned by December 15, 2014. However, the initial low response caused the MSTF to allow additional time and the last response was received on January 20, 2015.

The questionnaire included eight questions. The first and last questions were demographic questions aimed at identifying the respondent's location and status as either lay or ordained. The remaining six questions were open-ended questions concerning the respondent's views on various aspects of Mission Share. Each question is discussed below, including an analysis of the responses. The full set of responses to all questions is attached to this report.

A total of 57 responses were received, but only about 44 completed the entire survey. This lower number represents about one-third or less of the potential. Nevertheless, the actual number of responses and the percentage number are high enough to make the survey a reasonably reliable predictor of the entire universe of possible respondents.

**Question 1. In order to assure that we are hearing from all parts of the diocese, please mark an X in the Mission Area in which you are located. Use the map as a reference.**

This question was intended to achieve two purposes. First, it was aimed at engaging the respondent with an opening question that was both easy and attractive (looking at a map). It was hoped that this would help assure that the questionnaire was completed; that is, once the first question was answered, there would be a greater chance of answering the rest. Second, it was intended to indicate whether the total respondents were geographically dispersed or concentrated in one or more areas.

Area 1 – Downtown SD	13 (22.8%)	Area 4 – North SD County	7 (12.3%)
Area 2 – I-8 West	1 (1.8%)	Area 5 – I-15 Corridor	23 (40.4%)
Area 3 – La Jolla	4 (7.0%)	Area 6 – Coachella Valley	9 (15.8%)
		Area 7 – Imperial County	0 (0%)

Fifty-seven respondents answered this question. However, the remaining questions only garnered 43 to 45 responses, so about 12 to 14 people did not complete the entire survey.

Nearly half of the responses to Question 1 (23 of 57) were provided by the churches in Area 5 (I-15 Corridor – from Poway and Escondido to Menifee and Lake Elsinore). Area 1 (Downtown San Diego) was the second largest group (13 responses) followed by Area 6 (Coachella Valley) with 9 responses. Area 4 (North SD County – Vista, San Marcos, Carlsbad, etc.) provided with 7 responses. No responses were received from Area 7 (Imperial County). Based on the distribution of the responses, the survey cannot be said to fully capture the diversity of the Diocese; however, there are sufficient responses from Areas 1, 4, 5 and 6 to indicate that voices of many parts of the Diocese were captured by the survey.

### **Question 2. What is your understanding of the Mission Share Pledge?**

A review of the 44 responses to Question 2 suggests a division among three categories:

- 1) Mission Share Pledge is an obligation or requirement of the parish – 27 responses (61.4%)
- 2) Mission Share Pledge supports diocesan programs, goals, mission – 14 responses (31.8%)
- 3) I don't know – 2 responses (4.5%)

One response (2.3%) did not fit in any of these categories: *I know a lot about it.*

This question was to obtain an overall impression that local leaders have of the concept of the Mission Share Pledge. Several responses included a recognition of both Diocesan mission AND parish obligation. The decision to place an answer into one category (and not the other) was an interpretation of the reviewer. It was based on if the response appeared to place greater emphasis on either diocesan use or local contribution. For example, one respondent stated:

*It is our parish's contribution to the diocese to support its overall mission with a guideline that it should be between 10% and 20% of income as defined in the annual parochial report to the diocese.*

While the response provided information about the formula for calculating a parish's mission share, the focus appeared to be on the diocese's mission and this response was placed in Category 1, above. Another respondent stated, *they want 20% from each church to accomplish their goals.* This response was placed in Category 2 because of the use of the words "they want" and "their goals."

Using the above interpretive analysis, nearly two-thirds of the respondents understood the Mission Share as more of a local obligation while about one-third perceived it primarily as support for the diocese's missions. If accurate, it may suggest that respondents have a stronger identity with their parish than with the diocese. Further, it may indicate that there is insufficient understanding or appreciation for diocesan use of the Mission Share. This is treated in other questions, below.

### **Question 3. What information do you receive about the diocesan budget and spending?**

A review of the 44 responses to Question 3 suggests a division among four categories:

- 1) I receive very little or no information – 16 responses (36.7%)
- 2) I primarily receive reports at the Diocesan Convention – 14 responses (31.8%)

- 3) I primarily receive reports from other sources – 12 responses (27.3%)
- 4) I don't know – 2 responses (4.5%)

The purpose of this question was to gauge how informed local leaders believe they are regarding diocesan finances. The largest response group stated that they receive little to no information. Answers included, *not too much, None, Zero, and I honestly do not recall. Most likely a letter.* Other comments:

- *Really nothing until diocesan convention, and even there the budget information is incomplete. I really do not know what the diocese spends money on or what the priorities are.*
- *Mainly information about how much we're giving and what the diocese would like us to give. Not much information on how the diocese uses their percentage.*

In short, a large portion of the respondents do not have a recollection of receiving information about diocesan budget and spending. Several responses suggest that the information was available at one time, but it was not easily recalled or was not memorable.

A slightly smaller group identified the diocesan convention as the primary or sole source of reports on diocesan budgets and spending. Answers included, *I hear about it at convention, I receive a budget in advance of or at Diocesan Convention and A good summary letter from the diocese when our suggested MSP is sought and a thorough diocesan budget in the convention materials.* For this group the annual diocesan convention is the source of information; however, some respondents also note that while they have seen the information at convention, they may not necessarily avail themselves of it: *Not sure if I have looked for it, but I have seen it during the annual convention and Not very much; just whatever is distributed at diocesan convention.*

A third group representing about a quarter of the responses identified other sources for information about diocesan budgets and spending. Five (11.4%) found it in the diocesan newsletter, *magazine or publications.* Others stated that diocesan spending was discussed at vestry meetings or by the rector. Others identified various committees on which they serve where the issues are discussed. Finally, two respondents noted that they *don't know* or are *not sure.*

Overall, there is not a strong sense that information about the diocese's budget or spending is readily available or easily recalled. With the convention being the primary source of information, its annual occurrence may be too infrequent for people to consider it a sufficient means by which a strong or memorable understanding of diocesan finances may be obtained. While diocesan publications are more frequently distributed, they were a source of information for only a few.

#### **Question 4. Which diocesan programs should get more money and which, if any, should get less?**

A review of the 44 responses to Question 4 suggests a division among three categories:

- 1) I don't know or have enough information to answer this – 24 responses (54.6%)
- 2) Certain programs should get more funding – 19 responses (43.2%)
- 3) Certain programs should get less funding – 4 responses (9.1%)

Three of the responses identified both increases and decreases, so the total of the three categories represents 107% of 44 responses.

This question sought the local opinion on diocesan spending priorities, and the largest number of respondents concluded that they could not adequately identify increases or decreases to diocesan programs. Responses included, *No opinion, Unsure, Unknown* and *No comment*. Other comments:

- *I'm not familiar with the diocesan programs, really. The majority of my efforts go into the operations of our own church; I can't really comment on this question.*
- *I have no idea. I do know that diocesan program; do not reach over the mountains so there is no benefit to our community.*

Seven respondents noted that there would be more information needed to answer the question; for example:

- *That would be difficult to discuss without having a list of programs and a detailed discussion of the amounts received, the needs of each program, the effectiveness of each program, and the roles of each program in the Diocesan goals.*

For those who identified one or more programs that should receive increased funding, the following were named by individual respondents:

- Youth / young adults / Latino ministry
- Outreach / diocesan day-to-day administrative functions / support for clergy / training and education for churches / assistance and guidance
- Mission / Missions
- Youth / increasing membership in parishes
- Mission congregation
- Help parishes become stronger / lay and clergy education / diocesan staff
- Campus ministries
- Parish missional needs
- Expertise and support for parishes
- Financial support to a specific parish
- The bishop and canon / congregational vitality
- Strategically identify three or four areas of mission
- Cursillo / communities in need / immigrants who are not legal
- Church growth / evangelism / mission and church starts / campus ministry / advertising
- Churches in need of fiscal support / children and young adults / outreach at Ocean Beach
- Campus ministry
- Homeless / those in need
- Outreach
- Leadership workshops / youth and children's ministry

Those who identified areas to receive less funds specifically named the following:

- Mission churches
- Central offices
- Diocesan staff
- TEC / congregations too small to be viable

It should be noted that a list of individual items identified for more or less funding can mask the underlying message from the majority: There is too little information in this survey for most people to make an informed recommendation on changes to the diocese's spending plans.

**Question 5. What would you consider a reasonable percentage of your parish income to be given to the diocese and wider church?**

A review of the 44 responses to Question 5 suggests a division among three categories:

- 1) Ten percent (or less) – 31 responses (70.5%)
- 2) 10 to 12 percent – 5 responses (11.4%)
- 3) More than 12 percent – 6 responses (13.6%)

Two responses (4.5%) had other answers, discussed below.

This question attempted to assess local experiences and expectations regarding the actual contribution amount for Mission Share. However, the question does not answer whether the responses are based on past behavior (experience), future desires (expectations) or other factors. Nevertheless, more than two-thirds of respondents identified a Mission Share amount of 10% with a few respondents suggesting less. Eleven respondents (25%) simply noted 10% with no other qualifiers or comments. Others stated, *10%, as directed by the Biblical tithe, 10% of our collection plate and pledges, 10% of Parish Income after expenses and a tithe. 10%.* Other comments:

- *I think 10% is a fair amount, given that our parish is not very big. We have struggled from year to year with even the 10%. That being said, I think it's a fair goal.*
- *10% is fine. If I could see that how that money helps our congregation, we would probably give more. If we could see that money building the Episcopal Church presence in San Diego, my church would probably give more. But without knowing results, 10% is fine.*

Three respondents (6.8%) suggested less; one noted that *...8-10% is reasonable*, while two others suggested 5%.

Among those suggesting something above 10%, two respondents stated, *10 – 12%*, and one noted, *12%*. Others offered additional comment:

- *The current formula is equitable and fair. However, many of our congregations are on a shoestring budget and anything above 10-11% is not reasonable to expect.*

Higher amounts were suggested by a few, including, *10-15%*, *15%*, and *I think 15% is reasonable*. One respondent stated:

- *15% is what my church contributes. It would depend on the specific needs of the parish as to how much they would be able to contribute.*

At the highest amount, one respondent noted:

- *Our parish has targeted 20% and given that the past number of years. We have had to re-assess that for next year and reduced the percentage because of a projected deficit budget. A reasonable % depends on the project budget (10%-20% is OK)*

As noted above, it is not clear how or why respondents identified the amounts they indicated as the “reasonable” percentage, although several noted their own parish's recent giving pattern. Consequently, the issue of pledge amount may depend on local history and the value of the Mission Share contribution to the parish than on a given number. It must also be noted, however,

that a few respondents identified their selection of a 10% pledge as reflecting the traditional tithing amount.

**Question 6. What alternatives or modifications to a flat percentage of Total Operating Revenue should be considered?**

Out of the 44 responses to Question 6, a large group (10 responses or 22.7%) stated “I don’t know” or its equivalent (*no ideas, no opinion, etc.*) The remaining responses might be categorized, as follows:

- 1) Changes to the formula itself – 11 responses (25.0%)
- 2) Providing flexibility or taking consideration for special circumstances – 7 responses (15.9%)
- 3) Addressing the needs of a particular situation, including Mission Churches – 7 responses (15.9%)
- 4) Providing direct parish support for specific diocesan ministries – 3 responses (6.8%)
- 5) General comments – 6 comments (13.6%)

This open-ended question attempts to foster some creative thinking about the formula used to establish the Mission Share and it generated a wide variety of responses. The above categories are subjective and do not fully acknowledge the overlap that occurred in several responses. However, they represent the most dominant patterns of ideas and provide a framework for further discussion.

In recommending changes to the formula, four comments (9.1%) discussed what to include in the calculation:

- *...reduce the total operating revenue by mortgage payments and other loan re-payments. Also, need to allow a baseline amount to be put into savings (reserves)... Special circumstances need to be taken into consideration, which change the current year’s income from the prior years. For example if a significant income source is no longer in effect...*
- *Maybe a percentage of net income?*
- *Percentage should not include designated fund donations*
- *Some consideration for the cost of operations – a truer net disposable number than what is used now*

Four comments (9.1%) addressed the idea of a “sliding scale”:

- *...Congregations have core operating costs that lead to higher per capita expense at a smaller size than at a somewhat larger size. So, a sliding scale makes sense.*
- *Consider a sliding scale from 1 – 10% based on income after expenses have been calculated. ...it makes little sense to me to require a flat 10 – 20% of non-designated income when many parishes simply cannot afford that amount...*
- *Possible sliding scale... i.e. the first \$15K might be assessed at 7%...*
- *... a terraced range of percentages depending on total income; variations to allow for the number of clergy needed by a congregation depending on its size.*

Three comments (6.8%) addressed the use of financial numbers that are out of date:

- *All should be based on the current year’s actuals*
- *Somehow closing the “two years behind” gap. ... we’re paying now at 2012 rates using actual income that’s literally hundreds of thousands of dollars lower. It’s crippling us.*
- *The share percentage should be based on the latest fiscal year.*

Of the responses regarding flexibility or special circumstances, the following comments suggesting the need to take special considerations into account include:

- *I think there should be an equitable percentage worked out on size and other considerations...*
- *Considerations for certain types of specific needs or conditions...*
- *It should be adjusted based on the needs and the expected necessary expenses of the parish.*
- *...if a parish can't handle the required amount, the Bishop and Finance Director should review the circumstances and possibly allow participation at convention...*
- *Some congregations might have exceptional expenses from time to time that would require some consideration.*

As regards flexibility, two comments were offered:

- *...it is obvious that few churches really cannot make the 10%... We need some flexibility there.*
- *Encourage those parishes that can give more to do so.*

Among those related to particular circumstances, the following suggestions address the challenges facing Mission Churches:

- *...to expect a mission church that has been open for three years to be able to contribute the same percentage of its income as a mission church that has been open for ten years is, in my view is not reasonable.*
- *Mission churches receiving aid, need adjustments made, based on how much aid they receive. It seems silly for a Church to give 10%, only to receive that money back*
- *Churches supported by the diocese shouldn't have to give MSP on that amount*
- *Missions: 0% Parishes: a progressive %age based on NDI*

Other comments addressing special situations include:

- *I would limit it to just the plate and pledge money. Any money we receive from use of our facilities should stay with our church to cover the costs...*
- *...allow a lower percentage for churches say under 75 – and operating with a project deficit.*
- *An amount commensurate with how the diocese is contributing to the desert communities.*

Three comments (6.8%) suggested allowing parishes to directly pledge to particular missions of the Diocese:

- *We might try giving toward particular diocesan ministries rather than just to the budget or to regional projects...*
- *Percentage plus targeted fund raising for special projects. Perhaps ask each church to be a sponsor for the project of their choice.*
- *...one item might be a diocesan wide charity – such as Dorcas House or ECS – where we all pledge a set amount together... maybe each year have a different outreach project focus*

Of the six general comments, several interesting points were made:



- *...I don't think its right to take away representation at the diocesan conference if a church is unable to make the 10%...*
- *Parish Vestry should be allowed to pledge just like parishioners do...*
- *The important thing is to have a range – a goal and a minimum like the current structure...*
- *10% is a good round number but again, some parishes would find that amount to be above what they could contribute...*
- *Clergy compensation should be paid out centrally by the diocese, based...on proportional giving...and...proportionate deployment of those clergy resources. ...it would tackle one of the most inequitable features of our present day church; clergy compensation.*
- *Direct solicitation.*

**Question 7. How might your church's mission and ministry be strengthened through your relationship with the diocese?**

Out of the 44 responses to Question 7, six respondents (13.6%) stated that they already have a good relationship with the diocese and offered no specific suggestions. Three responses (6.8%) could be generally categorized as "I don't know". The remaining set of responses can be categorized, as follows:

- 1) Specific Programs – 9 responses (20.1%)
- 2) Improved communications – 7 responses (15.9%)
- 3) Administrative improvements – 7 responses (15.9%)
- 4) Administrative or other operational support – 6 responses (13.6%)
- 5) Greater interaction – 4 responses (9.1%)

Two comments (4.5%) did not seem to fit in any of the above categories

This last open-ended question seeks other ideas for helping the local church through the diocese. Again, a wide variety of responses were provided and the categories attempt to identify patterns that might provide direction for future discussion and action.

A large number of responses identified one or more diocesan-type programs that would help strengthen the parish, including:

- *...diocesan youth events are vital*
- *...connecting with the Future Church group of churches in our area will be helpful*
- *...the Area 4 process has really fostered a much closer working relationship with the people of and parishes in our area.*
- *Support (grants) for community garden (to feed the needy). Increased knowledge through training and education re: administrative functions and finances.*
- *Further work south of the border.*
- *The Leadership Academy is good and more ways to network leaders in our diocese to share best practices... ...a quarterly e-blast from each area about one or two things that vestries feel they have learned...*
- *...one or two very specific partnerships that would create a greater sense of investment.*
- *...regional collaboration on youth ministry and / or Hispanic ministry. ... diocesan education events have been very helpful...*
- *More collaborative ministries across the diocese*

Among those responses seeking improved communications, several noted the following:

- *For years, the leadership of our church had a “them against us” outlook. The new leadership is working with the diocese, sharing information, using the advice of the diocese, using the diocese’s resources to improve our church’s organization and procedures.*
- *Opportunities for networking / idea sharing*
- *...for the Parish / Diocesan relationship to be strengthened it is necessary for each to intimately know the other... ..might require other deacons / priests who would be closely associated with the rector and staffs of several parishes and who...would meet periodically with the bishop...*
- *More news given to the actual members of the church as a whole. The diocesan office seems a distant land...*
- *More communication about how we can help the diocese and connect better with other churches in the diocese.*
- *More sharing by the diocese of what other churches in the diocese are doing*
- *Better and increased communication.*

Several respondents identified a desire to improve administrative functions, either identifying specific issues or a general need. However, it is not clear from some answers if the suggestion applies to the local parish or to the Diocese:

- *Streamline the decision-making process...*
- *Complete transparency*
- *...there are many efficiencies that can be gained by pooling our resources and coordinating our activities.*
- *Better lay representation at the diocese.*
- *Improvements in practices, based on observation of other’s work in similar pursuits.*
- *The diocese could demand much more in terms of the quality of ministry... ..exercise effective oversight hat that draws more out of me and, dare I say it, my colleagues.*
- *...reduce redundancies and inefficiencies and increase the cooperation and sense of “same team” with the other parishes and the Diocese. Parishes remain in their own “silos.”*

Other responses addressed the need for more support from the diocese:

- *Finding ways to share resources remains a challenge, but one with the investment and frustration.*
- *Training, support.*
- *Training is evangelism, stewardship, outreach...*
- *Any support the diocese can offer to our mission is helpful....*
- *...more administrative support...from the diocesan staff. ... The service coalition is great example.*
- *Support*

Beyond the general issue of communications, a few respondents specifically identified increased interaction between their church and the diocese:

- *...those working for the diocese were more visible to the parish. Easier access to diocesan resources...*

- *We need to take a visit by our parishioners to the diocese to see all the good work being done... We also need to make these services more accessible to all.*
- *More direct participation in diocesan events.*
- *Diocesan representatives doing vestry visits, forums, and sermons on a regular basis...*

**Question 8. Are you a Lay Leader or Clergy?**

Out of 45 respondents, 32 (71.1%) identified themselves as Lay Leaders and 13 (28.9%) stated that they were Clergy.

It is tempting to categorize the overall perspective provided by the responses to this survey as “lay-biased”. However, it would take a more detailed analysis (cross-tabulation) to determine if the responses from lay leaders and from clergy differed in any material way. Absent that analysis and considering that clergy represented nearly thirty percent of the responses, the overall perspective remains just that: an overall perspective of local (parish / mission church) views on Mission Share and related issues.