

PARTNERSHIP EVALUATION



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28 February, 2025

PRAYER FOR THE CHURCH

O God of unchangeable power and eternal light: Look favorably on your whole Church, that wonderful and sacred mystery; by the effectual working of your providence, carry out in tranquility the plan of salvation; let the whole world see and know that things which were cast down are being raised up, and things which had grown old are being made new, and that all things are being brought to their perfection by him through whom all things were made, your Son Jesus Christ our Lord. Amen.

Book of Common Prayer

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CHAPTER ONE

HISTORY AND CULTURE

As Christians we follow an incarnate God. In Jesus, fully human and fully divine, God embraced a specific time, place, history and culture. And yet, the universal truth of the Incarnation can only be known, experienced, and manifested in the realities of our own time, place, history and culture. It is thus important that the evaluation of the Partnership between the Diocese of Western New York (WNY) and the Diocese of Northwestern Pennsylvania (NWPA) begin with a brief history of the Partnership as well as the histories of the separate dioceses. Similarly, we need to consider seriously the culture of the Partnership, the cultures of both dioceses, and the broader social, political, and economic contexts in which both dioceses are located.

History/Histories

A brief history of both the Diocese of Western New York and the Diocese of Northwestern Pennsylvania as well as a history of the Partnership is a key starting place for this evaluation. Appreciating what both dioceses have in common in their histories, as well as what is distinct in their separate stories, is illuminating. It is important to note at the outset that, given their different histories and contexts, the two dioceses are of different sizes with 55 parishes/congregations and 6,014 members in WNY and 36 parishes/congregations and 2677 members in NWPA in 2023.¹ This is a significant difference that impacts the culture and functioning of each diocese historically and today.

¹ Link to data sources: [Our Congregations - The Episcopal Dioceses of Western New York & Northwestern Pennsylvania](http://www.episcopalpartnership.org) found at www.episcopalpartnership.org; Membership Data from The General Convention website found at www.generalconvention.org/research-statistics/

The Diocese of Western New York

The Diocese of Western New York is significantly older than the Diocese of Northwestern Pennsylvania. The diocese was created by the General Convention in 1838 when the Diocese of New York was divided in two. The ecclesiological character and liturgical traditions of the new diocese were thus informed by those of the Diocese of New York, particularly their Bishop, John Henry Hobart, the third Bishop Diocesan of New York and a key leader in the High Church Movement in The Episcopal Church. Originally the Diocese of Western New York encompassed all of the State of New York west of the city of Utica. When the Diocese of Western New York was divided from New York, it marked the first time in the history of The Episcopal Church that a diocese was created that was not contiguous with the state boundary. As a result, the term “diocese” entered the lexicon of The Episcopal Church since one could no longer speak about the Episcopal Church in New York as a single entity.

In its long history, Western New York has had a tradition of significant and influential bishops consistent with the cultural, political, and economic significance of the city of Buffalo. The second most populous city in New York, second only to New York City, Buffalo enjoyed many of the privileges of a major metropolitan center, including art, architecture, education, and medicine. The opening of the Erie Canal in 1825 guaranteed that Buffalo would become a leader in shipping of grain, steel, and other basic commodities from the midwestern and western regions of the United States to the industrial centers in the East and beyond to Europe and other parts of the world. Through the 19th and first half of the 20th centuries, Buffalo was thus an internationally significant center for transportation and manufacturing.

The Episcopal Church in the Diocese of Western New York, particularly in the urban center of Buffalo, enjoyed much of the same prestige that came with being a diocese in a major urban center. In contrast, the surrounding rural and agricultural parts of the diocese did not enjoy the same level of prestige and privilege. Still, the diocese as a whole saw itself as

a key player in the wider Episcopal Church with patrician bishops chosen from significant families. Downtown churches were well endowed architecturally and economically with many of the city's political and business elite as members. The Rt. Rev. Charles Henry Brent (Bishop of WNY 1918-1929) was emblematic of the place of Buffalo and the Diocese of Western New York in the nation and the world. While Brent, hailing from Canada, was not a person of financial means, he rose to become an internationally known Christian leader as Missionary Bishop of the Philippines, key organizer in ending the global opium trade, Chief-of-Chaplains of the American Expeditionary Forces in WWI, and founder of the modern Ecumenical Movement.

As The Episcopal Church grew in power, prestige, and membership across the United States during the last half of the 19th century and first half of the 20th century, dioceses were increasingly split off from larger dioceses, creating new dioceses. The Episcopal Diocese of Western New York was thus divided giving birth to the Diocese of Central New York in 1868, and Rochester in 1931. This gave Western New York a particular distinction as one of the few Episcopal dioceses that was both birthed from another diocese (New York) and gave birth to new dioceses (Central New York and Rochester) in the same manner.

The opening of the St. Lawrence Seaway in 1959 resulted in Buffalo losing its key strategic role in shipping. Similarly, with increasing globalization of industry in the second half of the 20th century, Buffalo's manufacturing declined as business moved to less expensive labor pools in other parts of the United States and overseas. The heyday for Buffalo, and for the Episcopal Church in Western New York was ebbing away. In the last decades of 20th century and into the 21st century, the diocese would continue to experience decline in membership, financial resources, and place in society. The Rt. Rev R. William Franklin, the eleventh Bishop Diocesan of Western New York from 2011 to 2019, began to imagine what possible options there might be for the diocese to respond constructively to the challenging times. This led to conversations with Bishop Sean Rowe of the Diocese of Northwestern Pennsylvania and eventually the founding of the Partnership.

The Diocese of Northwestern Pennsylvania

The recent history of the Diocese of Northwestern Pennsylvania shares many of the attributes as those of the Diocese of Western New York, especially the more rural areas and parishes of Western New York. Northwestern Pennsylvania is also not immune from the experience of decline. In the second half of the 20th century, Erie and the smaller towns and rural areas of the diocese, have seen a loss of industry and a commensurate decline in population leaving the diocese solidly in the “rust belt.” This has not always been the case.

The Diocese of Northwestern Pennsylvania was divided from the Diocese of Pittsburgh in 1910 as part of the growing expansion of The Episcopal Church in the late 19th and early 20th centuries. The Diocese of Pittsburgh was less influenced by the High Church Movement than the Diocese of New York and tended to be more low church with less ceremonially liturgical practices compared to New York. The diocese was originally known as the Diocese of Erie after its see city, but was later renamed the Episcopal Diocese of Northwestern Pennsylvania and included the 13 contiguous counties of the northwestern corner of the state.

Like the church, Erie continued to grow during the first half of the 20th century. Manufacturing, steel production, shipping of coal and other natural resources, all helped Erie and its surrounding region to grow. During this economic heyday, some parishes in the diocese, both in Erie and in smaller cities that had a manufacturing base, saw the leaders of industry, finance, commerce, and government populating their pews. Unfortunately, the base for these industries fell out in the second half of the 20th century and Erie, along with most of western Pennsylvania, shifted from being the “steel belt” or “coal belt” to the “rust belt.” Industrial decline led to population decline as people moved out of the region in search of new jobs and economic possibilities. The Episcopal Church in Northwestern Pennsylvania, like most institutions in Erie as well as the towns and smaller cities of the region, experienced significant decline in the closing decades of the 20th century and the first decades of the 21st century.

A point of pride during this difficult period for the Episcopal Diocese of Northwestern Pennsylvania was the election of The Rt. Rev. Sean W. Rowe as the eighth Bishop Diocesan in 2007. Elected at the age of 32, Bishop Rowe was the youngest bishop in The Episcopal Church for some time. Although raised in the Methodist church, Bishop Rowe was a real son of the diocese. Born and brought up in northwestern Pennsylvania, he was educated both at Grove City College and Gannon University in Erie where he earned a Ph.D. in organizational development and learning while serving as bishop. His theological training was at Virginia Theological Seminary whose low church and more evangelical history aligned well with Bishop Rowe's personal experience as well as the tradition of the diocese. It was a great source of pride for the people of Northwestern Pennsylvania that after seventeen years as their bishop, Bishop Rowe was elected to lead The Episcopal Church as the 28th Presiding Bishop.

The history of the Partnership of the Dioceses of Western New York and Northwestern Pennsylvania, as found on the Partnership website, appropriately acknowledges the key role that Bishops Franklin and Rowe played in imagining the possibilities of two dioceses working together. As the website says:

In a letter to their dioceses on September 22, 2017, the bishops of the Dioceses of Western New York and Northwestern Pennsylvania, along with the chairs of their respective standing committees, unveiled an idea they had been discussing quietly for several months: to create a unique partnership in which the two dioceses would share a single bishop, a single staff.²

After over a year of conversation and discernment, representatives from both dioceses met together in convention in October 2018 and mutually agreed to enter into a partnership

² Link to data source: [Our Partnership - The Episcopal Dioceses of Western New York & Northwestern Pennsylvania](#) found at [Home - The Episcopal Dioceses of Western New York & Northwestern Pennsylvania](#)

that would share programming, staff, and financial resources while maintaining separate incorporated status as individual dioceses. When Bishop Franklin retired in April 2019 at the canonically mandated age of 72, Bishop Rowe was elected by WNY as bishop with provisional charge of the Dioceses of Western New York. The two dioceses in the Partnership were now overseen by one bishop. Billed as an “experiment for the sake of the Gospel,” the Partnership of the Diocese of Western New York and the Diocese of Northwestern Pennsylvania was heralded as a bold and innovative venture by individuals within the dioceses as well as across the wider Episcopal Church. The fact that Western New York and Northwestern Pennsylvania were trying something new and shared a dynamic, well-respected, and creative leader in Bishop Rowe, was and is a point of pride for the Partnership.

Culture/Cultures

The importance of paying attention to the historical as well as the cultural realities of both dioceses and of the Partnership became immediately evident in the initial data gathering exercise at the 2023 October shared convention. At the jointly held convention of WNY and NWPA, the evaluators solicited input on two open-ended questions asking what they should be looking for in the evaluation. The evaluators did not require any identification from those providing information except the diocese with which they identified. There were 341 specific responses to the questions which were grouped into 19 distinct categories (see Appendix A – Evaluation Methodology). Comparing data by diocese revealed trends in shared perspectives. These trends seemed to be consistent with the findings related to the organizational culture of the two dioceses found in the research done by Human Synergistics previous to this evaluation (see Appendix B - Organizational Culture & Organizational Effectiveness).

At the same time, the evaluators hypothesized that we were seeing cultural differences between the two dioceses. To test these assumptions, we added to our research methodology an additional nine interviews with key leaders of each diocese, including

Bishops Franklin and Rowe, and those closely involved in the life of the Partnership (see Appendix A – Evaluation Methodology). Our goal in these in-depth interviews was to investigate the importance of culture, both the culture of the diocese as well as the culture of the wider social, political, and economic contexts in which each diocese was located, looking for commonalities and divergences between the two dioceses. These interviews were revealing.

In describing the culture of each diocese, differences emerged. 75% of those who spoke about NWPA spoke of the working-class identity of the diocese. They emphasized that consistent with the working-class identity there was a “can do” attitude that is open to cooperating with others to get something done. 80% of those who spoke about WNY emphasized the strong congregational nature of the diocese with a sometimes “oppositional” sense to new ideas. Consistent with this was a more “traditional” understanding of the church’s polity and practices. While both dioceses spoke about the importance of class, NWPA identified more with the working class, while those in WNY spoke of the historic place of socially and economically privileged people in the life of the diocese, especially in the more affluent parishes in urban Buffalo.

When asked about the continuity or discontinuity of the culture of each diocese with the wider secular culture in which they are located, there was both alignment with and divergence from the broader cultural contexts. 75% of interviewees who spoke about NWPA noted that the congregations of the diocese shared the broader social and economic realities of declining resources and an aging population. They spoke about needing to have a scrappy, practically-oriented, can-do mentality in order to survive. 75% of NWPA also identified that The Episcopal Church in Northwestern Pennsylvania is predominantly white with very few people of color and no congregations that are majority people of color.

Individuals identifying with the Diocese of Western New York also spoke of continuities with the surrounding culture. 80% of interviewees speaking about WNY emphasized that the “oppositional” way of discourse, where debate is valued, is consistent with the culture of Buffalo. At the same time, 60% of the same individuals noted that there are significant racial differences between urban Buffalo and the surrounding rural communities with a fair amount of segregation among a more diverse urban population while the surrounding communities are dominant white.

Interestingly, individuals from both dioceses spoke about a similar discontinuity between the culture of the dioceses and the surrounding secular culture. 75% of people from NWPA emphasized that The Episcopal Church in Northwestern Pennsylvania is more socially and politically progressive than the general population. In WNY interviewees also affirmed that The Episcopal Church is generally more “blue” than “red” especially since many conservative Episcopalians have left the church in recent decades. It was also noted that Episcopalians, especially in the urban context, are generally better off economically than the surrounding community.

When asked about perceptions of the culture of the “other” diocese, telling comments, often consistent with the diocese’s own sense of self, were made. 75% of NWPA interviewees identified that WNY had a “higher” view of the episcopate, with bishops historically coming from places of significant power and influence. A similar number observed that those who identified with Buffalo recall a grand past as the second largest city of New York that has experienced significant financial and social decline in recent history. Consistent with this more urban focus is the tendency of the diocese toward being “Buffalo-centric” although it was noted that the Southern Tier of WNY more easily identifies with the realities of NWPA. 80% of people from WNY identified that the working relationship between the bishop and the people of NWPA tended to be more accessible, collegial, and cooperative. 40% of interviewees from WNY also noted that NWPA was more rural, and more politically and socially conservative, than people in Buffalo. It was clear in both observations about the other diocese, and in the sense of one’s own diocese, that the

historical, cultural, and economic significance of having a major metropolitan area in one of the dioceses and not as large of a city in the other is a noteworthy difference between the two dioceses.

When asked about how the Partnership has impacted the interviewee personally and or her/his diocese there were a few points of modest agreement with 4 of 9 people identifying the following:

- ❖ There is some dissatisfaction with how the Partnership is working, with more dissatisfaction voiced in WNY than in NWPA.
- ❖ The work of the Commission to Dismantle Racism and Discrimination is perceived as important for advancing racial justice in the dioceses, especially in NWPA that has less racial diversity.
- ❖ The impact of COVID-19 in the early years of the Partnership negatively impacted the Partnership and its development in significant ways.
- ❖ There was a lack of clarity and understanding as to how the staff of the Partnership function to serve both dioceses.

When asked what else the interviewees wanted the evaluators to know regarding the life and witness of the dioceses and/or the Partnership, there was an overwhelming concern regarding the possibility of Bishop Rowe being elected Presiding Bishop of The Episcopal Church. 7 of 9 people interviewed spoke about the importance of Bishop Rowe's leadership, vision, and commitment to the Partnership. There was a very high regard for, and pride in, the possibility of Bishop Rowe being elected Presiding Bishop. At the same time, many wondered about the future of the Partnership if Bishop Rowe was no longer the diocesan/provisional bishop. It was clear that as proud as both dioceses are of Bishop Rowe and the possibility of his being elected Presiding Bishop, the thought of his leaving caused great anxiety and concern for the future of the Partnership.

Concluding Thoughts

This brief review of the shared history of the Partnership and the histories of the Dioceses of Western New York and Northwestern Pennsylvania, along with some initial observations of the cultures of both dioceses and the contexts in which they are located, highlights both what the dioceses embody individually and in common. Clearly both dioceses emerged from different historical circumstances. Western New York was carved out of New York in the early 19th century and shared the high church tradition of its parent diocese. Western New York then later gave birth to two other dioceses in New York. Seven decades after WNY was created, Northwestern Pennsylvania was divided from the Diocese of Pittsburgh with its more low church liturgical tradition. While also having rural communities, Western New York is dominated by the presence of the large urban reality of Buffalo as the “second city” of New York. Northwestern Pennsylvania is less urban-centric and its population is more evenly distributed across the region.

What both dioceses do share, however, is a common experience of decline - decline in the economic base and population which characterizes the rust belt, and the concomitant decline in the place, power, and prestige of the church. In both the data presented at the 2023 Conventions and in the interviews with leaders from both dioceses, we have found that the Partnership of the Diocese of Western New York and the Diocese of Northwestern Pennsylvania is indeed attempting to be a faithful and venturesome “experiment for the sake of the Gospel.” And given the economic, social, and population decline of both dioceses and their surrounding contexts over the last five decades, we wonder if a parallel watchword for the Partnership might be “a solution for the sake of a declining church” as much as an “experiment for the sake of the Gospel.”

CHAPTER TWO

FINDINGS

Introduction

Evaluation results are based on both qualitative and quantitative research, incorporating numerical data and descriptive data analysis. Qualitative data was collected through a series of interviews and listening sessions. This included cultural interviews with nine individuals, leadership interviews with fifty-seven individuals (either individually or in groups), and eight listening sessions (four conducted in person and four by Zoom) attended by 156 individuals. Quantitative data were collected by reviewing various documents and conducting an online survey with 397 participants. Key findings from the survey are included in this chapter, with comprehensive survey results available in Appendix C.

Thematic analysis was employed to identify, analyze, and interpret patterns in the qualitative data gathered from interviews and listening sessions. Common questions were utilized across all interviews for comparison of data collected. The questions used are listed below:

- 1) What is working well in the Partnership?
- 2) What could work better in the Partnership?
- 3) What opportunities do you see for the Partnership?
- 4) The Partnership has existed for five years as “an experiment for the sake of the Gospel.” How would you describe the impact of the Partnership on your diocese? on you personally? on the Gospel?
- 5) What do you believe is the best future for the Partnership?

In addition to questions 1-5, two additional tailored questions addressing the work of both Standing Committees, both Diocesan Councils, WNY Trustees, the joint Commission on Ministry, and the joint Commission to Dismantle Racism and Discrimination were used.

6) Describe the work of (name of the group) before and after the Partnership was established. What changed? What did not change?

7) What are the benefits of the Partnership for (name of group)? What are the challenges?

More than 1,700 individual responses were thematically categorized, resulting in the identification of key areas of consensus among participants. A breakdown of the distribution of responses is as follows:

Question	NWPA Lay # Responses N31	NWPA Clergy # Responses N36	WNY Lay # Responses N87	WNY Clergy # Responses N57	Staff # Responses N7
1	45	56	97	110	8
2	43	48	103	126	6
3	39	48	95	66	3
4	45	79	132	145	13
5	42	43	107	91	8
6	30	33	32	25	
Total 1,718	244	307	566	563	38

Note: Some individuals in both dioceses participated in more than one interview.

A detailed one-page SWOT (Strengths, Weaknesses, Opportunities, Threats) matrix provides a summary of the insights obtained from interviews and listening sessions. The SWOT analysis is a strategic tool used to identify and categorize the strengths, weaknesses, opportunities, and threats that an organization or institution, such as the Partnership, may face.

SWOT MATRIX
PARTNERSHIP BETWEEN THE DIOCESES OF WNY & NWPA (2025)

<p style="text-align: center;">STRENGTHS</p> <p>Diocesan cultures marked by love of the diocese, the importance of relationships, loyalty to the episcopate, willingness to experiment, resilience, practicality, and faithfulness</p> <p>Pride in being in the vanguard of cooperative ventures between dioceses in The Episcopal Church encouraging new possibilities</p> <p>A visionary bishop providing strategic and pastoral leadership to guide the development of the Partnership; a responsive and supportive Partnership staff</p> <p>Regional collaborations and partnerships that strengthen congregational life and witness</p> <p>Close relationships; desire for greater connection, collaboration, and witness; communications; work of the joint Commission on Ministry and Commission to Dismantle Racism and Discrimination</p> <p>Cost savings in operating budgets making funding available for strategic mission opportunities and grants</p>	<p style="text-align: center;">WEAKNESSES</p> <p>Diocesan cultures marked by suspicion, mistrust, negativity, grievance opposition, congregationalism, weariness, and yearning for the past</p> <p>Difficulty creating a shared Partnership identity while acknowledging the identity of each diocese; focus on what has been lost obstructing the view of what could be</p> <p>Belief that treatment of the two dioceses has been inequitable</p> <p>Dissatisfaction with communications</p> <p>Turnover, role clarity, responsiveness, and structure of Partnership staff; location and use of Partnership offices</p> <p>Lack of knowledge about cost savings and Partnership finances</p> <p>Lack of connection to the Partnership on the local congregational level</p> <p>A churchwide clergy shortage affecting many congregations</p>
<p style="text-align: center;">OPPORTUNITIES</p> <p>Build on the notion that critical mass provides greater diversity, resources, and impact; foster relationships and connection to build cohesion, shared identity, and trust; increase training and leadership development</p> <p>Explore cultural differences as contributing to shared identity through diversity of people, perspectives, and gifts</p> <p>If the Partnership continues, focus on participation in God’s mission and structure accordingly</p> <p>If the Partnership does not continue, respect and honor the positive aspects of the Partnership, and explore ongoing collaboration if desirable</p>	<p style="text-align: center;">THREATS</p> <p>Relational isolation and congregationalism intensified by geography distances and attitudinal differences</p> <p>A more widespread culture of complaint and grievance</p> <p>Unavoidable consequences of decline of Christianity and religious affiliation and practice in the United States</p> <p>Long-term sustainability and viability of congregations given loss of people, revenue, capacity, and confidence combined with aging buildings and populations, and difficulty securing clergy</p>

SWOT Analysis

Representative responses from participants are presented in *italic*.

Strengths

Strengths include what is done well and builds up the Partnership as a whole. Strengths are an indicator of the faithful and robust ways in which people, congregations, the dioceses, and the Partnership are participating in God's mission. Strengths highlight processes and systems that are strong and healthy. Strengths include people, experience, assets, knowledge, programs, structures, and initiatives that benefit the Partnership and advances its call to serve in Christ's name. Strengths are identified as follows:

1) Diocesan cultures marked by love of the diocese, importance of relationships, loyalty to the episcopate, willingness to experiment, resilience, practicality, and faithfulness

Organizational culture is a "system of shared values and beliefs that can lead to behavioral norms that, in turn, guide the way members of an organization approach their work, interact with one another, and solve problems"¹ Culture reflects shared attitudes and values, embodying the community's spirit.

Responses demonstrate a deep love of and commitment to The Episcopal Church as well as one's diocese and local congregation. Values held in common lead clergy and laity to live out their Baptismal vows in ways that are relational, practical, experimental, and innovative with a large dose of loyalty, care, resilience, and faithfulness.

Determining if the Partnership influenced or changed either diocese's culture would be challenging.

¹ Szumal, J.L. & Cooke, R.A. (2019). *Creating Constructive Cultures: Leading People and Organizations to Effectively Solve Problems and Achieve Goals*. Michigan: Human Synergistics International

2) Pride in being in the vanguard of cooperative ventures between dioceses in The Episcopal Church encouraging new possibilities

Laity and clergy alike in both dioceses are proud that the Partnership serves as an early example to the wider church for innovative approaches to being the church in the post-Christendom era.

There is pride being the standard bearer for the whole church trying to move away from an outmoded and impractical model that no longer fits reality.

The Partnership has shown, at least, that the church is able to put limits on its devotion to 'the way we've always done it' and attempt to put resources, effort, and emotional and spiritual commitment behind an idea meant to liberate resources for evangelism, mission, and being the church.

3) A visionary bishop providing strategic and pastoral leadership to guide the development of the Partnership; a responsive and supportive Partnership staff

Bishop Rowe is widely regarded and respected as the primary architect of the Partnership. He is credited with prioritizing and resourcing congregations for mission, encouraging strategic experimentation and innovation through collaboration, empowering the laity and strengthening the clergy. Visionary architects of adaptive change are infrequently characterized as pastorally attentive and accessible, yet clergy and laity in both dioceses speak about this bishop who loves them and how they love and admire him. Bishop Rowe will be a hard act to follow.

Many Partnership staff were mentioned for their responsiveness and support of congregations and leaders, with gratitude expressed for their service to both dioceses. Responses noted effective and timely communication keeping people informed about ministry activities and opportunities throughout the Partnership.

4) Regional collaborations and partnerships that strengthen congregational life and witness

The Partnership's website homepage states "Our dioceses are on a journey to discover how collaborating can help us transform our congregations and communities through the power of Jesus Christ."² Responses demonstrate gratitude for and excitement about new and ongoing collaborative ventures such as the Genesee Regional Initiative, Erie Episcopal, Collaborative Oil Region Episcopal Ministries, and St. Philip's in Buffalo and its collaborative efforts with others, to name a few.

5) Close relationships; desire for greater connection, collaboration, and witness; work of the joint Commission on Ministry and Commission to Dismantle Racism and Discrimination

Numerous responses from both dioceses indicate deep appreciation for relationships formed as a result of the Partnership.

The opportunity to meet and form relationships has been spectacular.

We have become part of one family, and it's very good to learn about our neighbors and to see how we are alike in many ways.

Numerous clergy from both dioceses made positive comments about clergy collegiality across the dioceses.

I have many more clergy colleagues who are of mutual support in shaping how we do ministry.

Clergy and laity in both dioceses want more connection, collaboration, and witness made possible through the Partnership.

² Link to Data Source: [Home - The Episcopal Dioceses of Western New York & Northwestern Pennsylvania](http://www.episcopalpartnership.org) found at www.episcopalpartnership.org

In a small diocese, you become used to doing things the same way and relying on the same people – when sharing knowledge and people the creativity just explodes.

People speak of the efforts of the joint Commission on Ministry and the Commission to Dismantle Racism and Discrimination in a highly positive manner, recognizing them as dynamic contributors to the success of the Partnership.

The dynamism of the Partnership imbued the Commission on Ministry. The combo of Commissions on Ministry has come up with a really wonderful way of operating and interviewing and discerning.

The Commission to Dismantle Racism and Discrimination has given us a structure, a purpose, and a connection to build relationships across the dioceses.

6) Cost savings in operating budgets making funding available for strategic mission opportunities and grants

Numerous responses centered on savings on operational costs which enabled increased funding for mission activities. Operational cost savings allow for the expansion of support services, strategic deployment of staff, creation and enhancement of regional collaborations, and the provision of grants.

When we put the Partnership together, we were seeking the financial benefit of not covering the full cost of the bishop in each diocese; this has been accomplished with one bishop and key staff to manage both dioceses.

Our parish has been able to find funding for much-needed outreach infrastructure through diocesan and Partnership resources.

A detailed financial review can be found in Chapter Three.

Weaknesses

Weaknesses are areas needing attention and improvement. These include under-performing processes, systems, and insufficient or inadequate assets, attitudes, relationships, resources, structures, programs, services, and staffing.

1) Diocesan culture marked by suspicion, mistrust, negativity, grievance, opposition, congregationalism, weariness, and yearning for the past

Hard feelings and broken relationships pose difficulties in living a common life united in Christ through the Partnership, and exist between some individuals across diocesan borders and between individuals within WNY. While the number of responses along this line are relatively small, the intensity of emotion is substantial. A small group can stir the pot; rumors lead to suspicion about motives resulting in loss of trust; and people become weary of drama that is counterproductive and destructive.

Factions among clergy and lay have worked hard to undermine the Partnership.

We need a greater sense of trust in shared mission. I have heard concern that the WNY diocese will no longer exist combined with fear that our cathedral would no longer be a cathedral.

Both dioceses exhibit an oppositional mindset confirmed by interviews and the Organizational Culture Inventories (see Appendix B). This oppositional mindset likely existed prior to the formation of the Partnership and was described by one individual as:

...something some take as a vocation rather than a quirk.

Opposition can lead to creative thinking and restructuring. On the other hand, it can also focus on problems without contributing to constructive and collaborative problem-solving.

The independence inherent in congregationalism promotes isolation from the greater body and assumes the local congregation is largely self-sufficient and self-governing.

Congregationalism is a valid form of church polity. However, some aspects of congregationalism are in tension with The Episcopal Church's understanding of relational authority and the relationship between congregation and diocese, and in this case, the Partnership.

2) Difficulty creating a shared Partnership identity while acknowledging the identity of each diocese; focus on what has been lost obstructing the view of what could be

Individuals and groups hold dear and defend their culture and identity, and the dioceses of WNY and NWPA are no exception. For some people, cultural and regional differences have adversely impacted the establishment of a shared identity as a Partnership.

A powerful obstacle to establishing a greater shared identity are feelings of loss and grief for what has changed or been lost since the formation of the Partnership. It can be debated what caused the losses – some cite the pandemic and others reference decline of the established church and Christianity in general. Others think the Partnership is culpable. No matter the cause, loss and grief are realities to be contended with in both dioceses.

Loss and grief in NWPA is focused on losing the pre-Partnership level of presence, availability, and access to their bishop. Both laity and clergy recognize this loss, with the clergy experiencing it more noticeably. This loss was compounded by the election of their bishop to serve as Presiding Bishop. Additionally, some people in NWPA experience the Partnership as diluting the focus and work of governing bodies and strategy building at the expense of their diocese.

Loss and grief in WNY are focused on the loss of not having “their own” full-time bishop who lives in WNY and is devoted solely to WNY, a lack of events and gatherings within the diocese, decreased usage of the Diocesan Ministry Center, and the experience of some clergy of a decrease in the care and recognition of clergy.

(What is not going well is) our well-connected life as a diocese with events that brought us together in Christ has gone away since the Partnership began. I don't know if the Partnership is a cause.

Responses from both dioceses suggest there are some who feel diminished rather than enhanced by the Partnership. These two responses are mirror images of this sentiment.

It feels like to most people in NWPA as if we've been left behind.
(NWPA interview response)

I think WNY feels somewhat left behind.
(WNY interview response)

3) Belief that treatment of the two dioceses has been inequitable

As reflected in the responses about feeling left behind, responses from both dioceses demonstrate a perception or belief of some that resources, staffing, management, finances, and opportunities are not distributed equitably. This is particularly evident in responses from WNY. Responses from NWPA are predominantly wistful and resigned with responses from WNY predominantly angry and resentful.

4) Dissatisfaction with communications

There were numerous responses indicating widespread dissatisfaction with communications on every level. Responses indicate dissatisfaction with forms of communication, quality, frequency, transparency, equity in coverage of the two dioceses, Zoom replacing in person meetings, barriers to people in the pews receiving information, inability to find a list of resources, lack of knowledge about what is happening, and more.

As noted in the Strengths quadrant, Partnership communications are generally appreciated and valued. When people cite problems with communication even though communication is good or at least adequate, it may reflect deeper issues beyond just the mechanics of communication. In some cases, people use "communication" as a catch-all term for dissatisfaction. Even when communication is technically adequate, individuals

who feel discontent with decisions, policies, or culture may focus on communication as the surface-level issue because it's easier to identify and discuss.

5) Turnover, role clarity, responsiveness, and structure of Partnership staff; location and use of Partnership offices

Like communications, aspects of Partnership staffing appear in the Strengths quadrant, yet Partnership staffing is also a source of widespread dissatisfaction with a variety of reasons cited. Responses indicate dissatisfaction with staffing level, workload, frequent turnover, access and responsiveness, role clarity, lack of trust, evaluation and accountability, and lack of diversity.

6) Lack of knowledge about cost savings and Partnership finances

Responses from both dioceses indicate a lack of knowledge about Partnership finances and a desire for greater transparency and reporting. Some responses indicate skepticism that cost savings have been realized, or that projected cost savings have not met expectations.

From what I've seen at Convention, it does appear to me that there have been savings on administration and rededicated to mission and ministry work, not sure we've had a clear statement on that – have to parse through the budget to see that.

7) Lack of connection to the Partnership on the local congregational level

People involved in leadership roles tend to feel more connected to the Partnership than lay members in congregations which is likely due to more opportunities to meet and form relationships with people in the other diocese. Multiple responses mentioned geography as a barrier to fostering greater connection both within their own diocese and between the two dioceses.

8) A churchwide clergy shortage affecting many congregations

Congregations find it increasingly difficult to find even supply clergy. Seminary enrollment and ordinations are steadily decreasing across The Episcopal Church and in most denominations in the United States, and the number of congregations seeking part-time clergy has dramatically increased. The church has not fully adjusted to this reality, and many congregations yearn for the days of a full-time rector for every congregation. Adoption of the lay-led and clergy-supported model of ministry is alleviating this stress in some places, and some are resistant to the changes implicit in this model.

Opportunities

1) Build on the notion that critical mass provides greater diversity, resources, and impact; foster relationships and connection to build cohesion, shared identity, and trust; increase training and leadership development

Responses indicate excitement that two dioceses joined in partnership can strengthen ministry and impact for the sake of the Gospel.

The strength of both dioceses together is at geometric progression – each has strengths but together even stronger than either one could be alone.

There are more voices, personalities, and ideas because we are double who we were.

Responses demonstrate the view that to have even greater impact for the sake of the Gospel, the Partnership needs to strengthen relationships, connection, collaboration, and trust. Relationships are at the heart of the Gospel and at the heart of ministry. Numerous responses recognize the need to go beyond the relationships formed in individual congregations and ministries and find innovative and life-giving ways to partner and collaborate with one another within and across dioceses. This offers the Partnership a significant opportunity to foster collaboration and learning.

continued collaboration with opportunities to learn from each other and to inspire each other, skills that could be shared more widely, and

more collaboration across differences.

There is a strong desire for more education and training, particularly in lay ministries and leadership development, which presents an opportunity to enhance commitment, confidence, and impact.

2) Explore cultural differences as contributing to shared identity through diversity of people, perspectives, and gifts

An opportunity exists to explore how cultural differences contribute to a richer, more complex shared identity as a Partnership, while still retaining the unique history, identity, and culture of each diocese. People from diverse backgrounds bring unique viewpoints and skills, which can help create a more inclusive church. Diversity enhances and strengthens collective identity, allowing everyone to contribute their distinct gifts to a larger, more unified whole.

We were not prepared to handle the challenges of different cultures, and the fallback position is defensiveness and protection of the parishes and regions we know the best. We still have not figured it out, and we have a lot of healing to do. I'm not sure how we are going to do that, but we need to.

3) If the Partnership continues, focus on participation in God's mission and structure accordingly

The opportunity exists to build on the successes and learn from the failures of the Partnership. There is significant support for this opportunity coupled with a recognition that it will take time, tolerance, and perseverance to accomplish.

The opportunity is finding courage together to let go of old broken structures that no longer serve us well (e.g., deaneries) while imagining and creating new ones that serve the Gospel better.

Given this, there is a new opportunity to serve as a model for the wider church for strengthening collaborative ventures that have existed for some years. Governing bodies, such as the Standing Committees and Diocesan Councils, or a cross-diocesan team of senior leaders, staff, and other stakeholders, could be charged with identifying areas needing strengthening as identified during the Partnership evaluation process.

Strengthening the Partnership might involve:

- ❖ Understanding what challenges each diocese faces in maintaining and participating in the Partnership,
- ❖ Identifying areas where changes or improvements are necessary,
- ❖ Developing a plan to address the identified challenges and opportunities,
- ❖ Keeping both dioceses informed about the progress of the plan ensuring transparency and preventing misunderstandings,
- ❖ Providing a mechanism for ongoing dialogue so that concerns can be addressed promptly, and
- ❖ Monitoring progress as challenges are identified and initiatives are implemented; scheduling regular opportunities to assess how things are progressing and if further adjustments are needed.

4) If the Partnership does not continue, respect and honor the positive aspects of the Partnership, and explore ongoing collaboration if desirable

If the decision is made to discontinue the Partnership, WNY and NWPA have the opportunity once again to serve as a model for the wider church by managing a healthy transition that is marked by respect, pastoral care, careful planning, transparency, and thoughtful communication. A transition that focuses on the immediate and long-term health of both dioceses might include the following:

- ❖ Recognizing the positive aspects of the Partnership and honoring the work that has been done together,

- ❖ Planning a final event, service, or gathering to honor the Partnership's legacy, expressing gratitude, and celebrating the positive impacts the Partnership has had on both dioceses,
- ❖ Making certain transition plans are in place with the Standing Committees taking the lead; ensuring staff are treated with sensitivity and care during realignment; reviewing ongoing projects or initiatives that are part of the Partnership and designating responsibility for any unfinished work; considering how to move forward independently while maintaining the possibility of future collaboration in other ways, if appropriate, and
- ❖ Providing pastoral care and support for those who may feel hurt or unsettled by realignment.

Threats

Threats are obstacles that could harm the Partnership. Threats can be internal or external. Internal threats may include how people live in community, how people approach their work and ministry, and issues in the current organizational culture or climate. External threats may include societal, political, environmental, demographic, or technological as well impending changes that are potentially harmful to the Partnership and its participation in God's mission.

1) Relational isolation and congregationalism intensified by geographical distances and attitudinal differences

Lack of engagement and support from congregations would have a dire impact on the dioceses. Relational isolation and congregationalism are antithetical to the Anglican understanding that despite differences in theology, worship styles, regional differences, and cultural contexts, we are bound together by common prayer, the essential unity of all persons in the Body of Christ, with a bishop serving as the focus for unity. This is true for dioceses and for collaborative ventures such as the Partnership.

2) A more widespread culture of complaint and grievance

A culture of complaint and grievance is an environment in which individuals frequently express dissatisfaction, frustration, or criticism, often focusing on problems rather than solutions. In such a culture, complaints and grievances become central to interactions and may overshadow efforts to address underlying issues or work collaboratively toward improvement.

3) Unavoidable consequences of the decline of Christianity and religious affiliation and practice in the United States

The Episcopal Church, like many other denominations and faith communities, is undergoing momentous change and transition. It operates in a post-modern, post-Christendom context, where the number of individuals who do not identify as Christian or belong to a church is expected to keep rising. This shift poses increasing challenges for diocesan and congregational vitality and sustainability

4) Long-term sustainability and viability of congregations given loss of people, revenue, capacity, and confidence combined with aging buildings and populations, and difficulty securing clergy

The church is experiencing social dislocation and organizational challenges on every level – local, diocesan, provincial, and churchwide. Leaders and staff are acutely aware of the perils of this time.

I haven't seen everyone in the diocese really back the idea of the partnership. That refusal is somewhat of a hindrance because there are churches that are stuck in their ways and refuse to participate or change, and it has been an opportunity that too many parishes have refused to explore.

Key Points from the Partnership Evaluation Survey

Members of both dioceses were invited to complete an online survey, and 397 people participated. The survey shows a complex picture, with some positive outcomes but also significant concerns, particularly regarding spiritual impact, fairness in resource distribution, and the overall effectiveness of the Partnership. While most respondents favor continuing the Partnership, there is also notable support for ending the Partnership. See Appendix C for all survey results.

Demographics

- ❖ The majority of participants (68.77%) belong to the Diocese of Western New York.
- ❖ Most participants (76.07%) identify as lay people, and 63.95% are 65 years or older.
- ❖ The vast majority (95.06%) identify as White.

Participation

- ❖ The majority of participants are involved in the Partnership to some extent, with 35.77% actively participating in Partnership events on an occasional basis.
- ❖ Common forms of participation include attending diocesan conventions (74.90%) and events involving both dioceses (71.97%).

Satisfaction

- ❖ The overall satisfaction score is moderate, with 22.94% *Highly Satisfied* and 10.31% *Highly Dissatisfied*.
- ❖ Factors contributing to satisfaction include a relationship with the bishop, cost savings, and availability of resources.
- ❖ Common reasons for dissatisfaction include the Partnership not benefiting the diocese or congregation, lack of cost savings, and issues related to sharing a bishop.

Collaboration Effectiveness

- ❖ Most participants (77.29%) rated the collaboration between dioceses as effective (*Good to Average*).

Support and Equity

- ❖ Satisfaction with diocesan support is moderate (3.40 on a 5.0 scale), though a portion of respondents (14.59%) are dissatisfied.
- ❖ There are concerns about the fairness of support distribution between dioceses, with 24.60% dissatisfied.

Quality

- ❖ 81.92% of respondents rated the quality of Partnership initiatives as *Average to Very Good*.
- ❖ The perceived positive impact of the Partnership is moderate, with many seeing it as *Average or High*, but 25.48% rating it as *Low or Very Low*.

Impact

- ❖ A quarter of the respondents (24.38%) agree that the Partnership has drawn them closer to Jesus Christ and God's mission.
- ❖ The largest group (35.07%) remains neutral, indicating that more than one-third of the respondents neither agree nor disagree that the Partnership had influence suggesting mixed or limited spiritual impact attributed to the Partnership.

Future of the Partnership

- ❖ The majority of respondents (53.85%) favor continuing the Partnership.
- ❖ While the majority favor continuing the Partnership, there is significant support (33.79%) for dissolving it, indicating mixed opinions about its future.

CHAPTER THREE

PARTNERSHIP FINANCES¹

Background

This part of the report focuses on decisions made by the dioceses of Western New York (WNY) and Northwestern Pennsylvania (NWP) that affected the finances of the two dioceses as they worked in partnership with one another, specifically on perceptions of the overall benefits and costs of those decisions.

The background to the observations in this report included a review of:

- ❖ historical WNY and NWP diocesan financial reports,
- ❖ the 2024 budget narratives for each diocese,
- ❖ the 2022 report on the partnership, and
- ❖ The Episcopal Church's reports on attendance and financial support.

Interviews were conducted with:

- ❖ The Rt. Rev. Sean W. Rowe,
- ❖ Cindy Dougan, former NWP and Partnership Chief Financial Officer,
- ❖ Jeff Mills, current Partnership Chief Financial Officer and Canon for Finance,
- ❖ Maria Manocchio, Missioner for Finance WNY,
- ❖ Bob Matson, WNY Trustee leader and former Treasurer, and
- ❖ Bob Armstrong, NWP Treasurer.

The research on finances as they relate to the Partnership has been done independently of the research done by other members of the consulting team. Thus, some of this financial report may sound duplicative of other portions of the overall evaluation, and some of the observations may conflict with conclusions reached elsewhere. Additionally, the use the

¹ This chapter was written by The Rt. Rev. Larry Benfield, Adjunct Consultant for the Evaluation for Finances and Mission Funding.

word “programming” can include any sort of work beyond the cost of essential diocesan staff. In general, programming is any work that supports the mission of the dioceses and the larger church.

Some History Leading to the Partnership

The initial interest in forming a partnership stemmed from discussions among the then-bishops of the two dioceses. These dialogues were influenced by trends in charitable giving and church attendance within The Episcopal Church generally, and the two dioceses specifically. Additionally, there was a concern that without structural changes, the church's active presence in its communities, along with its ministries and programs, would not be sustainable in the future.

It was a discussion between the two bishops that had been occurring across the wider church as well. For example, average Sunday attendance in the Episcopal Church went from 657,000 in 2013 to 561,000 in 2018 and further declined to 411,000 in 2023.

Comparable results for the two dioceses were:

Attendance ²	2013	2018	2023
NWPA	1,493	1,280	981
WNY	3,508	2,626	1,684
TOTAL	5,001	3,906	2,665

The *combined* average Sunday attendance in the two dioceses in 2018 was less than the average diocesan Sunday attendance of approximately 5,100 in any *one* of the dioceses throughout The Episcopal Church. It likely served as at least a subconscious encouragement for the bishops and other people in diocesan leadership roles to consider new ways to carry out God’s mission in WNY and NWPA.

² Link to Data Source: [Membership & Average Attendance - The Episcopal Church](https://www.generalconvention.org/membership-and-average-attendance-the-episcopal-church) found at www.generalconvention.org

At the same time, giving rose in the two dioceses in the early part of the time frame examined before levelling off recently, somewhat in contrast to the larger Episcopal Church.

Average Pledge³	2013	2018	2023
NWPA	\$1,891	\$2,299	\$2,450
WNY	\$1,745	\$2,132	\$2,024

These numbers compare to the overall domestic Episcopal Church's average pledges of \$2,573 in 2014, \$2,953 in 2018 and \$3,648 in 2023. Note that the *combined* average pledge in the two dioceses went from 41% greater than the average pledge in *one* typical diocese in the larger church in 2013 to 23% greater in 2023. This was another trend that needed to be considered when planning. Total plate and pledge income for the two dioceses from 2013-2023 is as below:

Total Plate & Pledge Income⁴	2013	2018	2023
NWPA	\$2,222,584	\$2,148,428	\$2,012,398
WNY	\$5,050,670	\$4,866,212	\$4,408,705
TOTAL	\$7,273,254	\$7,014,640	\$6,421,103

Note that any increase in individual pledges was offset by the reduction in attendance, resulting in a decrease in overall plate and pledge income.

The combined metrics of the decline in attendance and the decline in total plate and pledge income, especially compared to the larger Episcopal Church, encouraged a change

³ Link to Data Source: [Stewardship & Giving - The General Convention of The Episcopal Church](http://www.generalconvention.org) found at www.generalconvention.org

⁴ Link to Data Source: [Stewardship & Giving - The General Convention of The Episcopal Church](http://www.generalconvention.org) found at www.generalconvention.org

in how the dioceses felt that they could carry out their participation in God's mission. The people interviewed mentioned the reality of being in the American "rust belt." What that reality meant for the future economic wellbeing of the region was a factor in the decision to enter a partnership, even if the specific, local economic challenges in Western New York and Northwestern Pennsylvania varied somewhat.

What the Partnership Attempted to Do with Cost Comparisons

It was almost unanimous among the people interviewed that the publicly stated reason for entering a partnership was to save money. What was meant by "save money" varied somewhat according to the person interviewed. The reason most often stated was the goal of saving money on the cost of a bishop, which is the single largest personnel expense for each diocese. Closely connected to this hoped-for saving was the goal to save money on the cost of diocesan staffing, primarily for administrative staff. The third reason given was slightly different: to use money saved to increase program possibilities in each diocese, or as the narrative budgets of 2024 stated it, to "allocate more resources to supporting local congregations and regional partnerships and sustaining key initiatives." Note that the people being interviewed primarily spoke of the hope of freeing up money for programming in the diocese, not primarily for making across-diocesan-borders programming, although that was mentioned as a benefit.

Leaders in the two dioceses decided that certain jobs could be combined, the most obvious of which being that of bishop. Bishop Rowe, in assuming his work in the Diocese of Western New York as well as in his original Diocese of Northwestern Pennsylvania, brought some of his leadership team in to work in Western New York for administrative oversight in general, and financial oversight specifically. Personnel expenses were shared, including those of the bishop, the Canon for Congregational Support, the Canon for Finance, the Canon for Administration, and Missioners for Administration and Finance. Salary and benefit expenses were, overall, equally divided between the two dioceses, with the exception being that the primary housing allowance for the bishop was paid by

Northwestern Pennsylvania, with a smaller housing allowance set aside for his time in Western New York. In what may have been an effort to offset this imbalance, the salary of the bishop was higher in Western New York than in Northwestern Pennsylvania.

Salary, housing, pension contribution, and employment tax figures in this report are based on the 2015 and 2022 financial statements of each diocese, and they are sometimes rounded to the nearest \$1,000. Benefits, primarily for health insurance, were not included because the cost of health insurance across diocesan boundaries can vary widely and can vary inside a diocese based on the circumstances of individual employees. For comparison purposes, inflation-adjusted amounts are also listed, but this report does not attempt to report on how individual salaries were adjusted for inflation in the past or how they might be adjusted in the future.

That the bishop's salaries and benefits are listed in this report separately from other staff salaries is because a focus of some of the interview comments was whether an individual diocese would be able to afford the cost of a bishop in the future. Please note that this question of affordability did not arise in discussing other individual staff positions, although it would be an important driver of discussions of any future partnership work.

The expenses budgeted for a Bishop in 2022 were as follows:

Budgeted for 2022	Salary	Housing	SECA Tax	Pension
NWPA	\$70,000	\$50,000	\$18,360	\$24,905
WNY	\$95,000	\$15,000	\$8,415	\$21,315
TOTAL	\$165,000	\$65,000	\$26,775	\$46,220

The grand total budgeted for a bishop from both dioceses in 2022 for was \$302,995.

The total of expenses related to the office of Bishop for each diocese in 2015, both actual and adjusted for 2022 inflation were:

2015 OFFICE of the BISHOP EXPENSES	2015 Actual	Adjusted for 2022 Inflation
NWPA	\$159,000	\$195,470
WNY	\$149,000	\$183,077
TOTAL for both dioceses	\$308,000	\$378,547

Comparing the total cost for two bishops in 2015 adjusting for inflation (\$378,547) with the expenses budgeted for 2022 (\$302,995) for the office of one bishop for the Partnership reflects a decrease of \$75,552 from 2015 to 2022.

It is similarly helpful to compare the expenses for the Bishop with the expenses for diocesan staff other than a Bishop. These expenses include salaries, pensions, employment taxes, and consultants' fees for those positions that support diocesan administration or programming in each diocese, and they are rounded to the nearest \$1,000. Not included are expenses that would remain independent, such as sextons. Thus, these totals do not equal the amounts seen on diocesan financial statements. The total staff expenses budgeted for 2022 were as follows.

STAFF EXPENSES	2022
NWPA	\$318,000
WNY	\$321,000
TOTAL both dioceses	\$639,000

Actual 2015 staff costs and 2015 costs adjusted for 2022 inflation are as follows:

STAFF COSTS	2015 Actual	Adjusted for 2022 Inflation
NWPA	\$334,000	\$410,000
WNY	\$328,000	\$403,077
TOTAL both dioceses	\$662,000	\$813,000

Comparing the total 2022 staff costs for both dioceses with the 2015 staff costs adjusted for inflation in 2022 reflect a total decrease in costs from \$813,000 to \$639,000 — a reduction of \$174,000. As the dioceses continue their work past 2022, personnel expenses account for relatively similar percentages of all expenses for each diocese (48% for Northwestern Pennsylvania and 53% for Western New York in 2024). Please read the 2024 narrative budgets of each diocese for further information on expenses.

Reflections on How the Partnership Worked

Naturally, differences existed in how to exercise oversight through the work of a bishop and diocesan office in the two dioceses. It is important to remember that in the eyes of the people interviewed, the partnership existed primarily to save money through ending the duplication of administrative costs. The people interviewed often stated that the work of the diocesan staff (outside of the bishop personally) was primarily administrative. Differences in state law in Pennsylvania and New York made for a few instances where learning how to handle situations required patience on the part of people who asked for information or help from someone in the other diocese when trying to solve administrative problems.

In the interviews, what seemed to be even more important than legal differences were cultural differences. People of the two dioceses sometimes felt themselves as representatives of different socio-economic backgrounds. Thus, their approach to

involvement in church—and how they viewed the church financially—varied somewhat. On occasion, words such as “workers” and “owners” were used to describe differences.

These differences showed up in how financial oversight was exercised. For example, the role of diocesan trustees in overseeing the investment and expenditure of endowment funds appeared to be much stronger in Western New York than in Northwestern Pennsylvania. Additionally, there was a perception that in Northwestern Pennsylvania, the bishop was more unilaterally in charge of diocesan financial decisions than in Western New York, a cultural difference that was met with some pushback.

This difference in management style bled over into matters of day-to-day financial oversight. There was a perception that financial decisions for the Partnership were being overseen by Northwestern Pennsylvania, and that NWPA had knowledge of, and control over, financial operations that was not always shared with people in Western New York. Oversight appeared to extend in one direction and not the other; perceived collaboration could have been stronger.

Perhaps the greatest point of discussion centered around clarity of how well the Partnership had achieved the goal of reducing costs and how a reduction in those costs benefited the work of the dioceses. The 2024 Western New York narrative budget reported a 6% decrease in staff expenses since 2019. Diocesan leaders in both dioceses had said that a reduction in office expenses would free up money for programming, but the perception remained that the two dioceses had given up some autonomy but without a commensurate increase in effective programming. There was a feeling, particularly, in Western New York, that new programming ideas were few and far between, and indeed, programming seemed to have declined. Programming that might cross diocesan boundaries seemed hard to contemplate, and if contemplated, hard to initiate, and if initiated, hard to come to fruition.

This lack of clarity remained despite narrative budgets that were prepared in close consultation with each diocese. For whatever reason, clearly explaining how new programming was made possible due to cost savings—and the creativity that arises when more people are involved in developing new ideas (that is, people from two dioceses, not one)—did not seem to occur. Thus, the lack of transparency arose as an issue.

Another challenge was proportionality. How do the two dioceses share the workload of the combined staff and how are the expenses shared to reflect the workload? There was some concern about equity in salaries for jobs with similar responsibilities, and there was concern about how salaries should be adjusted for the time that employees are spending on work that is for the benefit of only one diocese.

A related issue arose around the proportionality of diocesan assessments and how individual congregations have been supported by diocesan financial assistance. Each diocese has its own policy on diocesan assessments and how congregations are supported by those assessments. In 2024, Northwestern Pennsylvania reported that 80% of its operating income came from congregations, while Western New York reported 91%. Read the respective 2024 narrative budgets for more information. The people interviewed did not feel that assessment differences was a major issue, because the public perception of the original reason of the Partnership was to save administrative/personnel costs, not to adjust income sources.

There had apparently been some worry at the time of the Partnership's formation that there might be an attempt to merge the endowment funds of the two dioceses. There was no desire to do so on the part of the people being interviewed, and indeed, it is hard to see how there would be significant financial savings on administrative costs if they were. Endowment funds come in part with legal restrictions (often from donors) on how money is spent, further complicating any effort to merge assets. The main issue is how people in charge of endowment fund investments and expenditures (which differs in the two dioceses) might or might not be willing to use money for programming that crosses

diocesan boundaries, but little was mentioned about this issue among the people interviewed.

Yet another issue is how clergy salaries in congregations are set, which has the potential to affect how staff salaries are set for those jobs that cross diocesan boundaries.

What Might Occur in the Future

This report purposefully does not contain a prescription as to what financial steps the Partnership should take or the costs of future alternatives. It is not easy to predict the cost of personnel expenses for each diocese should the Partnership cease, nor is it easy to predict the level of programming. Future personnel and programming expenses depend on various external factors, including inflation and diocesan revenues from both assessments and investment returns, that this report cannot predict. Instead, this report has focused on a description of what has happened, particularly on the perceptions of the people interviewed. And the report of what has taken place raises questions that any future partnership discussion would need to address. They include:

- ❖ Is the goal of the Partnership primarily to save money or primarily to increase programming/mission in a world of decreased church participation and financial support? Or if it is both, how do people determine which emphasis is more important?
- ❖ How will issues of financial transparency be addressed?
- ❖ How can the people in the two dioceses have an open conversation about cultural differences and how to overcome them or perhaps make use of them for common participation in God's mission?
- ❖ Would most future programming be focused on each diocese individually or co-operatively between dioceses?

- ❖ How can administrative issues be addressed across diocesan and state boundaries?
- ❖ How is the issue of the bishop and staff's time in each diocese addressed in a way that is financially equitable?
- ❖ How will equitable salaries and benefits (especially across diocesan boundaries) be set for diocesan staff? Who will oversee this effort?
- ❖ Do there need to be discussions about clergy salaries and how they are set in the two dioceses, especially if there is one person in charge of transition and clergy placement for both dioceses?
- ❖ Can each diocese afford the cost of a bishop in the future? The cost of an adequate diocesan staff?

As the two dioceses discern, separately and together, what the future of the Partnership is, it would be beneficial to address these questions as fully and as transparently as possible.

CHAPTER FOUR

ANTI-RACISM EFFORTS¹

Background

The Commission to Dismantle Racism and Discrimination (CDRD, “the Commission”) has been central to the Partnership between the Dioceses of Western New York (WNY) and the Diocese of Northwestern Pennsylvania (NWP). The Commission has been a prominent example to showcase the potential benefits of working in partnership. The Commission built on previous anti-racism activities undertaken by the individual dioceses. WNY had a history of more structured activities, most notably educational offerings such as Implicit Bias classes held at the diocesan level. Anti-racism activities in NWP were historically more decentralized, sponsored by individual parishes acting within their local community. An evaluation of the Commission’s successes and obstacles is key to understanding the future potential of the Partnership.

Process

A series of videoconference focus groups and individual interviews were done between October and December 2024. Individuals to be interviewed were identified by diocesan leaders and the evaluators. Interviewing CDRD members was a primary objective; other interviews of non-members were included to increase perspective.

Each focus group and interview lasted approximately one hour. Participants were asked a series of six open-ended questions, similar to those used in other parts of the Partnership evaluation. The questions were:

1. What is working well for the Partnership’s anti-racism efforts?
2. What is not working so well for the Partnership’s anti-racism efforts?

¹ This chapter was written by Dr. Michelle Holmes, MD, Ph.D., Adjunct Consultant for the Evaluation of Racial Justice and Reconciliation.

3. How do these successes, challenges, and opportunities in anti-racism work differ by the two dioceses?
4. What opportunities do you see for the Partnership's future anti-racism efforts?
5. How do you perceive the Partnership's commitment to anti-racism work?
6. What else would you like to tell us?

Answers were transcribed in real time and in the case of focus groups, numbers of people agreeing to various points made were noted.

After the focus groups and interviews, all transcriptions were combined and themes identified. Themes were identified as points that at least three people endorsed. Themes were combined over all six questions and are reported as:

- ❖ Things Working Well (Strengths)
- ❖ Things Working Not So Well (Weaknesses)
- ❖ Looking Toward the Future

Participants

Nine people participated, representing the following categories:

Participants		
Male/Female	3 male	6 female
White/BIPOC ²	5 White	4 BIPOC
Clergy/Lay	5 Clergy	4 Lay
WNY/NWPA	5 WNY	4 NWPA
CDRD Members	7 members	2 non-members

² BIPOC is an acronym that stands for "Black, Indigenous, and People of Color."

Limitations

Representation of various stakeholder groups was reasonable with the following caveats. Four of the five BIPOC individuals interviewed were Black, and all were members of the historically Black St. Phillip's Church in Buffalo NY. One BIPOC individual was Hispanic/Latino/Latina. Notably absent were Asian and Indigenous perspectives.

Attempts were made to interview members of the Church of the Good Shepherd, the parish located in Irving, NY within the Seneca Nation. However, such interviews were difficult to arrange due to communication challenges. As a result, members of Church of the Good Shepherd were not interviewed for this evaluation.

I was told there were no Asian persons in a position to give a perspective. A previous Asian leader was identified as having left the region prior to the current anti-racism work.

No more than two individuals not serving on the Commission were made available for interview.

It is important to remember that this is a qualitative assessment. All views presented represent participants' perceptions of the strengths and weaknesses of the Partnership's anti-racism efforts. No attempt was made to fact-check.

Themes Identified

Four Things Working Well (Strengths)

- 1. The move to decentralize the activities of the Commission (compared with diocesan level activities in WNY previously) was identified as a positive.**

More activities are taking place throughout the two dioceses. Events named include Underground Railroad historical commemorations in both Buffalo, NY and Sharon, PA; a civil rights pilgrimage to Alabama; Healing Circles in Buffalo NY after the Tops grocery store massacre; and an event recognizing abuses at an Indian boarding

school in the region. Small grants (\$500) to individual parishes to sponsor anti-racism activities are perceived as particularly welcome. A representative quote is:

Before the Partnership we (the Diocese of WNY) would have one to two central educational events per year such as implicit bias training. We would try to capture everyone. And afterwards no one knew what to do next.

2. Bishop Sean Rowe's personal support and leadership is seen as key to any success claimed.

People are excited that his election as Presiding Bishop means that anti-racism work might be further emphasized in the national Episcopal Church.

Sean's election will only support and increase the Partnership's anti-racism efforts.

3. The emphasis on the theological imperative for anti-racism work.

The Commission has given the message that anti-racism is an important activity for all Christians as part of Jesus' command to love our neighbors. This has been an important message for parishioners in areas where few people of color live. Often, people of color do exist in those areas, but are not Episcopalians. They may be members of other faith traditions or none, or may be transient, such as college students or migrant workers. This emphasis is seen as successfully countering any notion that "this is not our problem here," and broadening the concept of community.

Anti-racism work is Gospel work.

Racism is a problem for the whole church, not just for Black people.

4. The Partnership between the two dioceses is seen as complementary and strengthening both dioceses in their anti-racism work.

The Diocese of WNY has a longer history of structured anti-racism activities and those in the Diocese of NWPA welcome being part of this structure. Yet, there has been smaller scale innovative anti-racism work in NWPA often at the level of individual churches rather than at the diocesan level. There was a concern expressed that the work in WNY had become somewhat stale and the infusion of new people and ideas from NWPA was welcome and brought new energy to the joint work. This joint effort is perceived as generally positive throughout both dioceses, and no one identified any significant current opposition to the emphasis or activities.

I think we have good interaction between WNY and NWPA.

Interacting with people from Buffalo has added diversity to those of us in NWPA.

The addition of enthusiastic participants from NWPA was a shot in the arm of energy to those of us in WNY.

People at the parish level support us.

Four Things not working so well (Weaknesses)

1. The perceived geographic concentration of people of color presents a challenge to the work.

The overwhelming majority of BIPOC Episcopalians in the Partnership live in Buffalo NY, attend St. Phillip's Church, and are Black. There is an historically Indigenous parish, Church of the Good Shepherd, associated with the Seneca Nation. However its members are not involved in the anti-racism work through the diocese or

Partnership. No populations of Hispanic/Latino/Latina or Asian Episcopalians were identified.

Even the larger cities in NWPA and the rural areas of Diocese of WNY outside of Buffalo and the Seneca Nation were said to have few people of color. This demography is believed to be why it has been difficult to recruit BIPOC leaders and members of the Commission, clergy for individual parishes, and diocesan staff; there are very few internal leaders identified from which to recruit. Lack of day-to-day contact with people of color for most White parishioners in both dioceses has meant the additional task for the Commission to convince people that the work is important.

Some White people believe that we can't be racist because we don't have any Black people.

Despite a lot of effort, we could not recruit a Black priest to be Rector of St. Phillip's.

People of color in other (US) dioceses criticize us for having a lot of White leadership (in the anti-racism work).

The lack of BIPOC leadership means we miss their lived experience to push from within.

Representation is limited because St. Phillip's is the only Black church.

2. The anti-racism work is Buffalo-centric.

This challenge follows from #1 in the Weaknesses, from the long-standing anti-racism work done by the non-Episcopalian Black community in Buffalo, and from the galvanizing effect of the tragic racist massacre at the Tops grocery store in 2022.

Buffalo is a world unto itself compared with PA and even NY areas outside of Buffalo.

Even areas like Erie PA seem unengaged and no one knows why.

3. People from PA and rural areas sometimes feel treated as less-than by people from NY and specifically people from Buffalo.

The notion that rural Pennsylvanians in general do not care, or do not see the importance of anti-racism work was invoked several times by New Yorkers, despite the contradiction of appreciating the energy, activism, and events sponsored by individual Pennsylvanians.

PA folks rely on (us) NY folks to get stuff done. This is not to shame or blame them, but they just seem less confident. They are trying.
(WNY participant)

Folks in WNY, and Buffalo, look down on us as hicks from Appalachia. They think they have the only approach to anti-racism, yet we are the ones actually doing the work. We are active, not activist. (NWPA participant)

It is hard to have impact and get participation in PA.
(WNY participant)

4. Commission members are passionate about the work, however administrative tasks are not their strength.

This includes tasks such as organizing and publicizing events and handling grants. Both Commission members and non-members agree with this, although they differ as to the solution. Commission members feel that although their work is generally supported by the Partnership, they wish they had more paid administrative staff time. Non-commission members note that the paid administrative resources desired by the Commission are not available to other groups/committees in the Partnership who rely on the volunteer members to do that work.

Staff come and go. We ask for reports and don't get them. It's hard to get stuff done. (Commission member)

Commission members have lots of skill sets and expertise, for example adult education, organizational theory, and race justice and DEI. They are long-term church leaders who know how to get people engaged. Administrative skill is a real weakness. They will be like this until they get someone on that Commission with these skills.
(Non-Commission member)

Looking Toward the Future

There was one point of strong consensus about the future: participants see the anti-racism collaboration as separate from the decision on whether the Partnership continues.

Participants believe that collaboration in anti-racism activities between the two dioceses strengthens those activities in both and should continue in the future. Participants felt that the collaboration could continue regardless of the status of the Partnership, and whether there was one or two bishops. One person wondered whether this assessment process was relevant at all; another acknowledged that a new bishop or bishops less supportive than Bishop Rowe would make the collaboration more difficult. Some speculated that it might be worthwhile to expand the anti-racism collaboration to the Dioceses of Pittsburgh and/or Rochester as well.

Participants generated numerous individual ideas for future anti-racism action although there was no consensus. These included a focus on environmental justice, an exploration and recording of the regional history of structural racism, exploration of more effective BIPOC hiring, more speakers, community dinners between White Episcopal churches and Black congregations of other faiths, a focus on measuring outcomes, more educational activities, more decentralized activities at the parish level, more inclusion of Hispanic/Latino/Latina, Asian, and Indigenous communities and issues, and dismantling of elitist attitudes from New Yorkers toward Pennsylvanians and urban citizens toward rural citizens leading towards a more “authentic” partnership.

Synthesis and Possibilities

- ❖ The collaboration between the two dioceses on anti-racism activities has been more successful than their previous individual efforts because of complementary skills and approaches. Participants perceive an increase in number of activities, people reached, and generalized support for anti-racism work.
- ❖ There is an appetite to continue the anti-racism collaboration, regardless of the status of the Partnership.
- ❖ There are three growth opportunities identified that could enhance current perceived successes:
 - 1) Provision of people with strong administrative skills to the Commission. Although paid staff is desired, a more realistic solution is to recruit volunteers with these skills to be Commission members. This would also be more equitable with other diocesan committees.
 - 2) Expand focus to other populations of color, including Hispanic/Latino/Latina and Asian communities. A particular effort should be made to invite the members of the Indigenous church (Good Shepherd) and community.
 - 3) Even with a focus on anti-racism, other forms of “better than” and “less than” can coexist. In particular, those from urban environments are more historically included and those from rural environments are more historically excluded. Attention to this reality and the undoubtedly out-of-awareness dynamic of subtle slights would enhance and strengthen the success of this already congenial collaboration.

CHAPTER FIVE

OPTIONS GOING FORWARD

The Episcopal Church, as an “episcopal” church meaning “of the bishop,” believes that the presence of a bishop as the ecclesiastical authority in each and every diocese is basic to our church’s structure and ecclesiology. It is not too much of an overstatement to say that a diocese is not a diocese without the care and oversight of a resident bishop.

Because of the election and installation of The Rt. Rev. Sean W. Rowe as the 28th Presiding Bishop of The Episcopal Church, the Diocese of Western New York (WNY) and the Diocese of Northwestern Pennsylvania (NWP) have been without a resident bishop since late 2024.

As provided for in the Constitution and Canons of The Episcopal Church, the respective Standing Committees of each diocese are serving faithfully as the ecclesiastical authorities in WNY and NWP. This is, by necessity, a temporary circumstance until a new bishop or bishops can be secured for the dioceses. The future of the Partnership is thus intimately tied up with decisions related to the nature of the episcopate in each diocese. Understanding the different options with respect to the episcopate in each diocese, and in the Partnership as a whole, will aid the discernment as to this future of the Partnership.

This concluding chapter of the evaluation of the Partnership will briefly review the current canonical options before both WNY and NWP with respect to the episcopate. It will then present seven options for each diocese going forward. These options will be essentially the same in each diocese although because of differences in geography and history, some of the choices before each diocese will be a bit different. It is important to note at the outset that each diocese in the Partnership will have to decide, on their own, which path they wish to follow. If their futures are to be shared, then both dioceses will have to choose the same option. If WNY and NWP choose different options, then that will in practice signal the winding down of the Partnership. It is thus important for all in the dioceses of WNY and NWP, and especially the lay delegates and clergy who will participate in the May 3, 2025,

Special Diocesan Convention, to fully understand the options before each diocese, and the Partnership as a whole, in this time of transition.

Types of Episcopal Leadership

Understanding the nature and shape of the office of the bishop, and the options before both WNY and NWPA at this time of transition, is helpful for discernment with respect to the future. It is important to emphasize at the outset that the responsibility for discerning and calling a bishop, both with respect to the type of bishop as well as the specific person to serve as bishop, is the responsibility of the diocese. While the office of the Presiding Bishop is responsible to “take order for the consecration” of a new bishop, and whose office has generally provided counsel and support to dioceses searching for a new bishop, the burden and privilege of electing a bishop is the full responsibility of the local diocese.¹ Having said that, a bishop is a bishop for the whole church catholic (“catholic” here meaning universal.) Thus, when a bishop is elected by a diocese, their election needs to be consented to by a majority of bishops in The Episcopal Church exercising jurisdiction (meaning bishops in charge of dioceses) and a majority of Standing Committees in The Episcopal Church.² A duly elected bishop thus becomes the Bishop Diocesan and serves as the ecclesiastical authority of a diocese with tenure until reaching the age of 72, the required retirement age for all clergy in The Episcopal Church.³

In some instances, when there is a transition in the office of the Bishop Diocesan and a diocese is without a bishop, a diocese may choose to engage the services of a “temporary bishop” for a limited period while continuing to pursue the election and seating of a Bishop Diocesan. The Canons of The Episcopal Church provide for two kinds of temporary episcopal ministry. An already ordained bishop in The Episcopal Church may be invited by

¹ Article II. Sec. 1. and Canon III.11.1.a of the *Constitution and Canons of The Episcopal Church*.

² Canon III.11.3.a

³ The offices of Bishop Coadjutor or Bishop Suffragan are not addresses in this evaluation report as they do not apply to the dioceses of WNY or NWPA at this time.

the Convention or Standing Committee to visit the diocese in order to exercise episcopal offices (meaning sacramental ministry) for a stated period of time; and the invitation to the visiting bishop may be revoked at any time.⁴ These visiting bishops are sometimes referred to as a “Visiting Bishop” or “Bishop Visiting” although such titles are not found in the Constitution and Canons of The Episcopal Church.⁵ Sometimes the visiting bishop is also referred to as an “Assisting Bishop” although this is a misnomer. Per the Canons, Assisting Bishops are invited by the ecclesiastical authority (usually the seated Bishop Diocesan) to serve the limited functions of teaching, preaching, and providing sacramental rites.⁶ In some cases, an Assisting Bishop may be called by the Standing Committee if they are serving as the ecclesiastical authority when there is no Bishop Diocesan, although the Canons assume that a Bishop Diocesan usually invites an Assisting Bishop to serve alongside her or him.

The term “Assisting Bishop” is not to be confused with the canonical provision for an Assistant Bishop.⁷ An Assistant Bishop is an already ordained bishop of The Episcopal Church or another Church in the Anglican Communion invited by a seated Bishop Diocesan to assist the Bishop Diocesan for a set term and only during the tenure of the particular Bishop Diocesan. And the Bishop Diocesan can only invite an Assistant Bishop if the Convention of the Diocese has approved the creation of the position in advance. Neither an Assisting Bishop or an Assistant Bishop is an immediate option for the dioceses of WNY and NWPA as the dioceses are currently without a Bishop Diocesan needed to invite another bishop to assist her or him.

The other type of bishop that assists a diocese in times of transition, which could apply to WNY and NWPA, occurs when a diocese is placed under the provisional charge and authority of a

⁴ Canon III.13.2

⁵ The Canons do provide for a Bishop Visitor or Protector but that title is reserved for bishops who are overseeing and providing episcopal and pastoral care for a religious/monastic community.

⁶ Canon III.12.10.m

⁷ Canon III.12.5

bishop of another diocese, or of a resigned bishop, or a bishop that has been received into The Episcopal Church. Such bishops are sometimes referred to as a “Provisional Bishop” or “Bishop Provisional,” although such titles are not specified in the Canons of The Episcopal Church. Bishops with a provisional charge of a diocese are called by an act of the Convention of the diocese, in consultation with the Presiding Bishop, and exercise all of the duties and offices of the Bishop Diocesan until a Bishop Diocesan is elected and ordained for that Diocese or until the act of the Convention calling for the bishop with a provisional charge is revoked.⁸ In the context of the Partnership of the dioceses of WNY and NWPA, Bishop Sean Rowe was duly elected to serve as the Bishop Diocesan of the Diocese of Northwestern Pennsylvania in 2007, and called by the Convention of the Diocese of Western New York to be the “Provisional Bishop” of the diocese in 2019.

To clarify, during this current time of transition for both the dioceses of WNY and NWPA and for the Partnership, the dioceses have the option of inviting a bishop or bishops to visit either one or the other, or both dioceses, in order to provide sacramental episcopal ministry. Similarly, both dioceses, by acts of their own Convention, may engage an already ordained bishop in The Episcopal Church to serve as a bishop with a provisional charge in either one or the other diocese, or both dioceses at the same time. It must be emphasized that each Diocesan Convention, acting separately and on their own authority, and in consultation with the Presiding Bishop, has the canonical responsibility for calling a bishop with a provisional charge.

Because the Partnership of the dioceses of WNY and NWPA is comprised of two separate dioceses – although sharing a bishop, staff, commissions, and programs – each diocese by act of their own Convention has the authority to discern their own way forward with respect to the future of their diocese and the calling of new episcopal leadership. To that end, this evaluation will separately present a variety of options before each diocese. There will be much overlap between the options with some slight differences because of the different geographies and histories of each diocese. Any possibility for the Dioceses of Western New York and

⁸ Canon III.13.1

Northwestern Pennsylvania to continue to work together, in one form or another, will require separate yet parallel actions by each diocese's Convention.

Options for the Diocese of Western New York

There are seven possible options, or paths, for the Diocese of Western New York going forward. They are:

1) Continue the Partnership with the Diocese of Northwestern Pennsylvania as currently constituted.

The dioceses of WNY and NWPA have the option to renew and recommit to their Partnership as currently constituted. As such, both dioceses would seek to continue to share one bishop. Depending on the perceived tenure of the Partnership going forward, the Convention of WNY might call, in communication and cooperation with NWPA, a bishop with a provisional call or might begin a process, once again in communication and cooperation with NWPA, of electing a Bishop Diocesan. If the Partnership is to continue sharing one bishop, then both dioceses would have to call the same bishop separately.

2) Become one new diocese through junction with NWPA.

The Canons of The Episcopal Church allow for the "junction" of two dioceses based upon the action of the Conventions of both dioceses and upon the submission of a joint agreement on union with supporting documents such as a Constitution and Canons for the new diocese developed by the Standing Committees and Ecclesiastical Authorities of both dioceses.⁹ The joint agreement on union would need to be ratified by the General Convention. Once ratified by the General Convention, the new diocese would move forward to elect its own Bishop Diocesan,

⁹ Article V.1, and Canon I.10.1

establish a singular budget with merged financial operations and resources, and determine all other matters necessary to becoming one diocese.

Some believe New York State Religious Corporation Law would hinder or prevent a junction between dioceses in New York and Pennsylvania. Others think it is legally and ecclesiastically challenging but possible and worth exploring.

3) End the Partnership and continue to cooperate with NWPA in specific ministries.

If the Convention of WNY decides that the diocese no longer wants to be in full partnership with NWPA yet still share some cooperative ministries and resources, then the Convention would choose to pursue its own path to securing a bishop with a provisional call, or the election of a Bishop Diocesan for WNY. WNY would discern with NWPA which ministries to continue sharing and address any staffing requirements as necessary.

4) End the Partnership and go separate ways as two dioceses.

If the Convention of WNY decides that the diocese no longer wants to be in partnership with NWPA in any way, then the Convention would choose to pursue either securing a bishop with a provisional call, or the election of a Bishop Diocesan for WNY. The diocese would also have to consider what it would look like to reestablish its own diocesan staff and at what cost separate from a shared staff with NWPA. For clarity of process and to recognize and give thanks to God for the gifts of the Partnership, it might be appropriate for the Convention of WNY to officially state that they no longer wish to participate in a partnership with NWPA.

5) Pursue a new partnership with a diocese other than NWPA.

A new partnership relationship with another diocese, perhaps the Episcopal Diocese of Rochester given that Rochester was partitioned from Western New York in 1931 and both dioceses share a border, could be initiated if Rochester were amenable to such. All the details and specifics basic to entering a new partnership, including questions related to the possibility of sharing a bishop, diocesan staff, finances, programs, commissions, and ministries would have to be determined in cooperation with the Diocese of Rochester.

6) Seek reunion with a diocese with which Western New York was once historically connected.

The Canons of the Episcopal Church allow for the reunion of two dioceses that were previously one diocese. The details of the reunion, including a joint agreement of union setting forth all the details of the reunion, must be initiated with the approval of the Conventions of the two dioceses. Once agreed to by the Conventions, the reunion needs to be consented to by a majority of bishops in The Episcopal Church having jurisdiction and a majority of Standing Committees of The Episcopal Church, or by the General Convention depending on timing.¹⁰ Given that the Dioceses of Rochester, and before that the Diocese of Central New York, were divided from WNY, reunion with either one, or both of these dioceses is possible, although reunion with Central New York and not with Rochester would be logistically and geographically difficult given that Rochester lies between WNY and Central New York. Similarly, reunion with the Diocese of New York from which WNY was originally divided is canonically possible but unrealistic given distance and geography.

¹⁰ Canon I.10.6-7

7) Enter a junction with another diocese other than NWPA or a reunification with Rochester/Central New York/New York.

While this is an unlikely scenario, it is canonically possible for the Diocese of WNY to join with another yet undetermined diocese to form a new diocese with another diocese other than NWPA or reunion with Rochester/Central New York/New York. A possible junction might be with the reuniting dioceses of Central Pennsylvania and Bethlehem (to be known as the Episcopal Diocese of the Susquehanna) as the southeastern corner of the border of WNY touches the northwestern corner of the Diocese of Central Pennsylvania. All of the same canonical requirements and processes required for seeking a junction with NWPA described in #2 above would have to be met.

Options for the Diocese of Northwestern Pennsylvania

There are seven possible options, or paths, for the Diocese of Northwestern Pennsylvania going forward. They are:

1) Continue the Partnership with the Diocese of Western New York as currently constituted.

The dioceses of NWPA and WNY have the option to renew and recommit to their Partnership as currently constituted. As such both dioceses would seek to continue to share one bishop. Depending on the perceived tenure of the Partnership going forward, the Convention of NWPA might call, in communication and cooperation with WNY, a bishop with a provisional call or might begin a process, once again in communication and cooperation with WNY, of electing a Bishop Diocesan. If the Partnership is to continue sharing one bishop, then both dioceses would have to call the same bishop separately.

2) Become one new diocese through junction with WNY.

The Canons of The Episcopal Church allow for the “junction” of two dioceses based upon the action of the Conventions of both dioceses and upon the submission of a joint agreement on union with supporting documents such as a Constitution and Canons for the new diocese developed by the Standing Committees and Ecclesiastical Authorities of both dioceses.¹¹ The joint agreement on union would need to be ratified by the General Convention. Once ratified by the General Convention the new diocese could move forward to elect its own Bishop Diocesan, establish a singular budget with merged financial operations and resources, and determine all other matters necessary to becoming one diocese.

Some believe New York State Religious Corporation Law would hinder or prevent a junction between dioceses in New York and Pennsylvania. Others think it's legally and ecclesiastically challenging but possible and worth exploring.

3) End the Partnership and continue to cooperate with WNY in specific ministries.

If the Convention of NWPA decides that the diocese no longer wants to be in full partnership with WNY yet still share some cooperative ministries and resources, then the Convention would choose to pursue its own path to securing a bishop with a provisional call, or the election of a Bishop Diocesan for NWPA. NWPA would discern with WNY which ministries to continue sharing and addressing any staffing requirements as necessary.

4) End the Partnership and go separate ways as two dioceses.

If the Convention of NWPA decides that the diocese no longer wants to be in partnership with WNY in any way, then the Convention would choose to pursue

¹¹ Article V.1, and Canon I.10.1

securing a bishop with a provisional call, or the election of a Bishop Diocesan for NWPA. The diocese would also have to consider what it would look like to reestablish its own diocesan staff and at what cost separate from a shared staff with WNY. For clarity of process and to recognize and give thanks to God for the gifts of the Partnership, it might be appropriate for the Convention of NWPA to officially state that they no longer wish to participate in a Partnership with WNY.

5) Pursue a new partnership with a diocese other than WNY.

A new partnership relationship with a diocese other than WNY is possible. Possible options for pursuing a new partnership could be with the Episcopal Diocese of Pittsburgh given that NWPA was partitioned from Pittsburgh in 1910, and both dioceses share a border. Another option would be to begin a partnership with the reuniting dioceses of Central Pennsylvania and Bethlehem, to be known as the Episcopal Diocese of the Susquehanna, given that NWPA shares an eastern border with Central Pennsylvania; or with the Diocese of Ohio, given that NWPA shares a western border with Ohio and both lie on the shores of Lake Erie. All the details and specifics basic to entering a new partnership, including questions related to the possibility of sharing a bishop, diocesan staff, finances, programs, commissions, and ministries would have to be determined in cooperation with the new partnering diocese.

6) Seek reunion with a diocese with which Northwestern Pennsylvania was once historically connected.

The Canons of the Episcopal Church allow for the reunion of two dioceses that were previously one diocese. The details of the reunion, including a joint agreement of union setting forth all the details of the reunion, must be initiated with the approval of the Conventions of the two dioceses. Once agreed to by the Conventions, the reunion needs to be consented to by a majority of bishops having jurisdiction and a majority of Standing Committees of The Episcopal Church, or by the General

Convention depending on timing. A reunion of NWPA with the Diocese of Pittsburgh is possible given that NWPA was partitioned from Pittsburgh in 1910.

7) Enter a junction with another diocese other than WNY or a reunification with Pittsburgh

Because of the same geographic circumstances described in a possible new partnership with either the new Diocese of the Susquehanna or the Diocese of Ohio outlined in #5 above, NWPA could pursue a junction with either the new Diocese of the Susquehanna or the Diocese of Ohio. All of the same canonical requirements and processes required for seeking a junction with WNY described in #2 above would have to be met.

Concluding Thoughts and Appreciations

It has been an honor and privilege to walk with you, the people of the Partnership of the Diocese of Western New York and the Diocese of Northwestern Pennsylvania, since July of 2023 when we first began this evaluation. Much has happened in the last year and a half for the Partnership, including the leave-taking of your beloved bishop, The Rt. Rev. Sean W. Rowe, upon his election and installation as the 28th Presiding Bishop of The Episcopal Church. Data provided from close to just over 2,000 sources, from information gathered at the 2023 Diocesan Conventions, individual interviews, an online survey, interviews with key diocesan leadership bodies, and listening sessions both in-person and via Zoom with lay and ordained leaders from each diocese (see Appendix A), have given your consultants a full and detailed picture of the gifts and challenges of the Partnership. We have been richly blessed by coming to know you, your dioceses, and the Partnership. And we thank God, and thank you, for all that you have given to us.

When we addressed your joint Diocesan Conventions in October 2023 in Erie, Pennsylvania, we stated that we did not have any predetermined opinions of, or conclusions about, the Partnership or what its future might be. We maintain that position.

We also stressed that as an “experiment for the sake of the Gospel” the Partnership would be successful if something is learned from it; for an experiment is always successful if something is learned, no matter the results. This evaluation has sought to offer learnings from the “experiment for the sake of the Gospel” so that the experiment may be successful. We have tried to reflect back to you what you have said through our manifold conversations, interviews, and data gathering exercises. We hope that you see yourself reflected honestly and genuinely in this evaluation. And we have tried to sketch out possibilities for WNY and NWPA, and for the Partnership, in this time of transition for you. We pray that this evaluation will be a helpful resource as you continue to discern how best to be the church that God needs you to be to serve God’s mission in Western New York and Northwestern Pennsylvania.

APPENDIX A

EVALUATION METHODOLOGY

The Standing Committees of Western New York and Northwestern Pennsylvania engaged consultants to develop an evaluation process to inform discernment about whether to continue a Partnership between the two dioceses, and to inform the development of strategies for both dioceses and potentially the Partnership, should it continue.

Information about the consultants can be found at the end of this appendix.

The consultants utilized various approaches to assess the Partnership, encompassing both quantitative and qualitative research methods. The integration of these research methods offers a more thorough understanding of the Partnership and its impact.

Quantitative data, which is numerical and measurable, describes the quantity, frequency, and extent of occurrences. This evaluation employs quantitative data obtained through document analysis, a survey available to all individuals within both dioceses, and pre-existing Human Synergistics Inventories, including the *Organizational Culture Inventory* (OCI) and *Organizational Effectiveness Inventory* (OCE).

Qualitative data describes qualities and characteristics, relies on interpretation, and explains what happened, why, and how. This evaluation uses qualitative data from table conversations at the 2023 joint diocesan conventions, interviews, and listening sessions.

Data Gathering Conducted at the Joint Diocesan Conventions October 2023

More than three hundred people participated in table conversations at the Joint Diocesan Conventions of October 20-23 providing important data to guide the evaluation.

Participants were asked to respond to two questions:

- ❖ In the evaluation, what do you want us to ask, look at, consider?
- ❖ What else do you want us to know?

Participants identified questions and concerns within the following nineteen areas as important and worthy of investigation.

- ❖ Alignments
- ❖ Attitudes/Behavior/Culture/Identity
- ❖ Bishop
- ❖ Clergy
- ❖ Communications
- ❖ Community Engagement, Outreach, and Ministries
- ❖ Congregations
- ❖ Diocesan Partnership – Multiple Aspects
- ❖ Diocesan Structures and Governance
- ❖ Equity
- ❖ Evaluation Process
- ❖ Finances and Resources
- ❖ Leadership
- ❖ Legal Ramifications
- ❖ Offices & Staffing
- ❖ Participation in God’s Mission
- ❖ Racial Justice Efforts
- ❖ Relationships
- ❖ Young People

Culture Interviews and Review of Human Synergistics Culture Inventories

Based on the data gathered at the joint diocesan conventions held in October of 2023, the consultants sought to understand the respective cultures of the two dioceses to provide an interpretive framework for the evaluation. The consultants interviewed the following nine people:

NWPA	The Rev. Canon Stacey Fussell
	The Rev. Canon Martha Ishman
	Mr. Ed Palatella
WNY	Ms. Saxon Cobb Deck
	The Rev. Nick Evancho
	Ms. Denise Clark-Merriweather
	The Rev. Canon Barbara J. Price

Bishops The Rt. Rev. R. William Franklin, Ph.D.
The Rt. Rev. Sean W. Rowe, Ph.D.

In addition to the nine interviews, the consultants reviewed and summarized the Human Synergistics Organizational Culture Inventory and Organizational Effectiveness Inventory data from NWPA (2017), WNY (2019) and the Partnership (2021). The summary is found in Appendix B.

Review of Written Materials

The consultants reviewed agreements, official acts, diocesan Constitution & Canons, convention journals, Episcopal addresses, financial statements, investment and financial management policies, diocesan policies and programs, organizational and staffing structures, partnership newsletters, website, Emmaus gatherings, and Partnership reports.

Quantitative Partnership-wide Survey

An online survey was conducted, and individuals across the Partnership were invited to participate. A total of 397 people completed the survey.

Leadership Interviews

The consultants interviewed fifty-seven individuals, including the bishop, partnership staff, five governing bodies (Standing Committees, Diocesan Councils, Trustees), and two joint commissions (Joint Commission on Ministry, and Joint Commission to Dismantle Racism and Discrimination).

Bishop (1) The Rt. Rev. Sean W. Rowe

Partnership Staff (7)

- Canon Vanessa Butler (Administration)
- The Rev. Canon Cathy Dempsey-Sims (Pastoral Care & Congregational Support)
- Ms. Deb Dietrich (Missioner for Administration)
- Canon Craig Dressler (Ministry Development & Transition)
- Ms. Maria Manocchio (Missioner for Finance)
- Canon Jeff Mills (Chief Financial Officer & Canon for Finance)
- Mr. Shawn Slother (Missioner for Operations)

Standing Committee
NWPA (8)

The Rev. Canon Stacey Fussell (President)
Ms. Donna Billioni
Mr. Joseph Croskey
Ms. Sara Nesbitt
Ms. Anne Bardol
The Rev. William Ellis
The Rev. Canon Martha Ishman
The Rev. Shawn Clerkin

WNY (8)

Ms. Saxon Cobb Deck (President)
Michael Bonilla
Mr. Lawrence Mazuchowski
Ms. Denise Clark-Merriweather
The Rev. Nick Evancho
The Rev. Luke Fodor
The Rev. Daniel Pinti
The Rev. Kim Rossi

Diocesan Council
WNY (5)

Ms. Karen Gengo
Ms. Cheri Maytum-Krull
Ms. Amy Swanson
The Rev. Stephen Lane
The Rev. Claudia Scheda

NWPA (10)

Canon Robert Armstrong
Ms. Anne Bardol
Mr. Ed Palatella
Canon James Steadman (Chancellor)
Ms. Cheryl Wild
Ms. Tawnie Williams
The Rev. Canon Dr. Adam T. Trambley
The Rev. David Best
The Rev. Dr. Mary Norton
The Rev. Matthew Scott

WNY Trustees (5)

Ms. Chris Casto
Ms. Patricia LaLonde
Mr. Robert Maston
The Rev. Matthew R. Lincoln
The Rev. Randi Hicks Rowe

Joint COM (7)

Mr. William McLean (Chair)
Ms. Beth Boron
Ms. Kaycee Reib
The Rev. Michael Hadaway
The Rev. Timothy Kroh
The Reb. Patricia Lavery
The Ven. Gail Winslow

Joint CDRD (6)

The Rev. Canon Helen Harper (Chair)
Ms. Denise Clarke-Merriweather
Ms. Susan Woods
The Rev. Canon Stacey Fussell
The Rev. Mark Elliston
The Rev. Matthew Lincoln

Thematic analysis is a qualitative research method used to identify and interpret patterns in data, specifically interview responses. The same interview questions were utilized for leadership interviews and listening sessions. Combined, thematically organized responses provide findings for assessing the Partnership.

Listening Sessions

Eight listening sessions were conducted, with invitations extended to all members of the two dioceses (lay and clergy) to participate either in person or via Zoom. A total of 156 individuals attended these listening sessions.

❖ **Western New York Lay Listening Session – 32 participants**

Held October 10, 2024, at the Diocesan Ministry Center in Tonawanda, NY

❖ **Western New York Clergy Listening Session – 33 participants**

Held October 11, 2024, at the Diocesan Ministry Center in Tonawanda, NY

❖ **Northwestern Pennsylvania Clergy Listening Session – 15 participants**

Held October 11, 2024, at St. Mark's Church in Erie, PA

❖ **Northwestern Pennsylvania Lay Listening Session – 11 participants**

Held October 15, 2024, at St. John's Church in Franklin, PA

❖ **Northwestern Pennsylvania Clergy Listening Session – 7 participants**

Held October 16, 2024, by Zoom

❖ **Western New York Clergy Listening Session – 11 participants**

Held October 17, 2024, by Zoom

❖ **Northwestern Pennsylvania Lay Listening Session – 7 participants**

Held October 21, 2024, by Zoom

❖ **Western New York Lay Listening Session – 40 participants**

Held October 22, 2024, by Zoom

Thematic analysis is a qualitative research method used to identify and interpret patterns in data, specifically interview responses. The same interview questions were utilized for leadership interviews and listening sessions. Combined, thematically organized responses provide findings for assessing the Partnership.

Review of Finances and Mission Funding

The Rt. Rev. Larry R. Benfield, an adjunct consultant, evaluated the Partnership's finances and mission funding based on document analysis and interviews as detailed in Chapter Three.

Review of Racial Justice and Reconciliation Efforts

Michelle D. Holmes, MD, Ph.D., an adjunct consultant, assessed the Partnership's efforts to dismantle racism and discrimination based on focus groups and interviews as detailed in Chapter Four.

Consultant Profiles

The Rt. Rev. Ian T. Douglas, Ph.D.
Principal Consultant

Ian Douglas retired (resigned) in October 2022 as the 15th Bishop Diocesan of The Episcopal Church in Connecticut. From 1989 to 2010 he was Professor of Mission and World Christianity at the Episcopal Divinity School, then located in Cambridge, Massachusetts, and Priest Associate at St. James's Episcopal Church in Cambridge, Massachusetts.

Ian grew up in a working-class Episcopalian family in a former mill town of central Massachusetts and is familiar with the economic and social challenges caused by

industrial decline. For more than two decades he has been both a client and consultant with VISIONS, Inc. (<https://visions-inc.org>), an anti-racist and multicultural organizational development consulting group.

Ian is well versed in the life of The Episcopal Church and the Anglican Communion, having served on the Executive Council of The Episcopal Church, Chair of the Standing Commission on World Mission, and member of the Anglican Consultative Council (2009-2016), and the Standing Committee of the Anglican Communion. He holds graduate degrees in theology, missiology, education, and organizational consulting from Harvard University and Boston University.

The Rev. Gay C. Jennings
Principal Consultant

Gay Jennings, born in Syracuse, New York, has lived in the Cleveland, Ohio area for over forty years. She owns Pebble Hill Consulting LLC, specializing in organization assessment, strategy building, governance, leadership transitions, staff development, and ecclesiastical discipline. With experience consulting with congregations, clergy, dioceses, and bishops, she has worked with more thirty-five dioceses on ministry reviews, organizational development, staff policies, and disciplinary issues. For 22 years, she also served as a search and transition consultant for congregations and dioceses.

Gay served as president of the House of Deputies of The Episcopal Church from 2012-2022. Prior roles include associate director of CREDO, canon to the ordinary in the Diocese of Ohio, parish priest, and hospital chaplain. She is a graduate of Colgate University and the Episcopal Divinity School.

The Rt. Rev. Larry R. Benfield
Adjunct Consultant

Larry Benfield served as bishop of Arkansas from 2007 to 2024. He served in the Diocese of Arkansas starting in 1992, including roles as rector of a downtown Little Rock congregation, interim rector at two large congregations, and canon for development and planned giving.

As bishop, he had oversight of the administrative and financial management of a diocese with fifty-four congregations and a diocesan budget of \$1.5 million, with two-thirds of that amount coming from congregational giving. He served as chair of the diocesan Board of Trustees, which oversees an investment portfolio of approximately \$9 million.

Before ordained ministry, he worked for eight years as a commercial banker at First City National Bank in Houston, Texas, focusing on Fortune 500 corporate relationships and oil and gas company lending. Larry has an MBA in finance from the Wharton School of the University of Pennsylvania, a BS in agricultural economics from the University of Tennessee, and an MDiv from Virginia Theological Seminary.

Michelle D. Holmes, MD, Ph.D.
Adjunct Consultant

Michelle Holmes spent years practicing primary care medicine in the South Bronx and among a largely immigrant population in a Cambridge neighborhood health center. In 2000 she transitioned to full-time epidemiology research, and she is based at Brigham Women's Hospital where she is an Associate Professor of Medicine. Her research interests include lifestyle factors (diet, weight, physical activity, psychosocial factors, and common medications such as aspirin) affecting the quality of life and survival after a breast cancer diagnosis. She has helped to design a longitudinal study of non-communicable disease (obesity, diabetes, high blood pressure, heart disease, cancer) at 5 sites in sub-Saharan Africa, relying on the principles of the DEI consulting firm VISIONS, Inc. to facilitate that multicultural collaboration. Given that positive experience, Michelle became affiliated with VISIONS, Inc. where she now serves as a

principal consultant. Michelle is both a dynamic presenter and a compassionate facilitator.

A life-long Episcopalian and member of St. James's in Cambridge, MA, Michelle has led VISIONS-based trainings for her parish and served as chair of its Anti-Oppression Team for 2 years. She also provides coaching and consultation to several Episcopal and other faith-based organizations

APPENDIX B

ORGANIZATIONAL CULTURE & ORGANIZATIONAL EFFECTIVENESS IN THE DIOCESE OF NORTHWESTERN PENNSYLVANIA, THE DIOCESE OF WESTERN NEW YORK, & THE PARTNERSHIP: A REVIEW OF 2017 – 2021

Summary

The report reviews the organizational culture and effectiveness in the Diocese of Northwestern Pennsylvania (NWP), the Diocese of Western New York (WNY), and their Partnership. Surveys were conducted in NWP in 2017, WNY in 2019, and the Partnership in 2021 to measure organizational culture and effectiveness. These surveys, administered by Human Synergistics, Inc., provided a baseline for measuring improvement and change over time.

The report identifies three types of organizational cultures: Constructive, Passive/Defensive, and Aggressive/Defensive. It describes the ideal and current cultures for each diocese and the Partnership, highlighting the primary and secondary styles for each. For example, NWP's ideal culture in 2017 was primarily Humanistic-Encouraging and secondarily Self-Actualizing, while WNY's ideal culture in 2019 was primarily Affiliative and secondarily Humanistic-Encouraging. The Partnership's ideal culture in 2021 was primarily Humanistic-Encouraging and secondarily Affiliative.

Both dioceses identified the Oppositional style in Aggressive/Defensive Culture as present in their current culture and desirable in an ideal culture. This is notable, and was confirmed in qualitative interviews conducted by the consultants in early 2024. An Oppositional style describes organizations in which confrontation prevails and negativism is rewarded. Members gain status and influence by being critical, opposing the ideas of others, and making safe (but ineffectual) decisions. While some questioning is functional, a highly Oppositional culture can lead to unnecessary conflict, poor group problem solving, and watered-down solutions to problems.

The report also discusses the gaps between the current and ideal cultures, noting the largest gaps in the dioceses and the Partnership. For instance, NWPA's largest gap was in the Self-Actualizing style, while WNY's largest gap was in the Achievement style. The Partnership's largest gap was in the Achievement style.

Additionally, the report assesses organizational effectiveness, comparing the dioceses' results to historical averages and constructive benchmarks. It evaluates causal factors and outcomes, such as articulation of mission, customer service focus, and individual, group, and organizational outcomes.

Overall, the report provides a comprehensive analysis of the organizational culture and effectiveness in the dioceses and their Partnership, offering insights into areas of improvement and strengths.

Background

From 2017 to 2021, leaders and staff in the Dioceses of Northwestern Pennsylvania and Western New York completed surveys to measure organizational culture and effectiveness. Surveys were administered in NWPA in September 2017, in WNY in February 2019, and in the Partnership in 2021.

These surveys, conducted by Human Synergistics, Inc., have been utilized and validated across many organizations and offer a reference point for the dioceses and the Partnership to track improvement and change over time.

Surveys Administered

- ❖ The Organizational Culture Inventory (OCI-Ideal) describes the diocese's values in terms of behaviors that people believe should be expected and encouraged in order to maximize the organization's effectiveness, or, in other words, the culture that people believe would be ideal to further the mission and work of the diocese.

- ❖ The Organizational Culture Inventory (Current Culture) identifies the current operating culture of the diocese. The current operating culture consists of the behavioral norms operative in the diocese, or in other words, what is expected of people in the diocese.
- ❖ The Organizational Effectiveness Inventory assesses factors and conditions that influence, shape, and reinforce the diocese's current operating culture and effectiveness. Organizational effectiveness describes the climate in the diocese.

Types of Organizational Culture

The Organizational Culture Inventory measures three types of organizational cultures: Constructive, Passive/Defensive, and Aggressive/Defensive. The inventory measures both Ideal Culture and Current Culture.

- ❖ Constructive Culture – members are encouraged to interact with others and approach work in ways that will help them meet their higher-order satisfaction needs, and is characterized by achievement, self-actualizing, humanistic-encouraging, and affiliative styles. Constructive cultures are generally collaborative, cooperative, participative, supportive, and relationship-oriented.
- ❖ Passive/Defensive Culture – members believe they must interact with people in ways that will not threaten their own security, and is characterized by approval, conventional, dependent, and avoidance styles. Passive/Defensive cultures are generally conservative, bureaucratic, non-participative, and conflict avoidant with centralized decision-making and a negative reward system.
- ❖ Aggressive/Defensive Culture – members are expected to approach their work in forceful ways to protect their status and security, and is characterized by oppositional, power, competitive, and perfectionistic styles. Aggressive/Defensive cultures are generally confrontational and non-participative.

IDEAL CULTURE

NWPA in 2017

There was a high level of agreement among members. Members described the ideal culture as:

Primary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Secondary Style – Self-Actualizing

A Self-Actualizing style characterizes organizations that value creativity, quality over quantity, and both task accomplishment and individual growth. Members of these organizations are encouraged to gain enjoyment from their work, develop themselves, and take on new and interesting activities. While Self-Actualizing organizations can be somewhat difficult to understand and control, they tend to be innovative, offer high-quality products and/or services, and attract and develop outstanding employees.

WNY in 2019

There was a high level of agreement among members. Members described the ideal culture as:

Primary Style – Affiliative

An Affiliative style characterizes organizations that place a high priority on constructive interpersonal relationships. Members are expected to be friendly, open, and sensitive to the satisfaction of their work group. An Affiliative style can enhance organizational performance by promoting open communication,

cooperation, and the effective coordination of activities. Members are loyal to their work groups and feel they “fit in” comfortably.

Secondary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Partnership in 2021

There was a high level of agreement among members. Members of the Partnership described the ideal culture as:

Primary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Secondary Style – Affiliative

An Affiliative style characterizes organizations that place a high priority on constructive interpersonal relationships. Members are expected to be friendly, open, and sensitive to the satisfaction of their work group. An Affiliative style can enhance organizational performance by promoting open communication, cooperation, and the effective coordination of activities. Members are loyal to their work groups and feel they “fit in” comfortably.

Breakdown by Diocese

In 2021, members of the Partnership from WNY identified Affiliative as the primary style for an ideal culture with Humanistic-Encouraging as the secondary style. These same styles were identified in WNY in 2019, although the primary and secondary styles were in reverse order in 2021.

In 2021, members of the Partnership from NWPA identified Self-Actualizing as the primary style for an ideal culture with Humanistic-Encouraging as the secondary style. These same styles were identified in NWPA in 2017, although the primary and secondary styles were in reverse order in 2021.

These results may indicate that both dioceses in the Partnership are striving for the same, or at least closely related, ideal culture. Given that the dioceses constituting the Partnership are faith-based organizations with a theology that emphasizes the dignity and worth of every human being, it is reasonable to expect that members taking the inventory would identify an ideal culture that is Constructive rather than Passive/Defensive or Aggressive/Defensive in character. No surprise there.

However, members of both dioceses identified the Oppositional style found in Aggressive/Defensive culture as present in the current culture and desirable in an ideal culture. This is notable, and was confirmed by interviews conducted by the consultants in early 2024. An Oppositional culture describes organizations in which confrontation prevails and negativism is rewarded. Members gain status and influence by being critical, opposing the ideas of others, and making safe (but ineffectual) decisions. While some questioning is functional, a highly Oppositional style can lead to unnecessary conflict, poor group problem solving, and watered-down solutions to problems.

Current Culture

NWPA in 2017

The current culture has lower intensity and agreement among members regarding behaviors that are and are not expected. Generally speaking, when there is low agreement,

the culture may not be so embedded to the degree that it would be very difficult to change.

Primary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Secondary Style – Affiliative

An Affiliative style characterizes organizations that place a high priority on constructive interpersonal relationships. Members are expected to be friendly, open, and sensitive to the satisfaction of their work group. An Affiliative style can enhance organizational performance by promoting open communication, cooperation, and the effective coordination of activities. Members are loyal to their work groups and feel they “fit in” comfortably.

Gaps Between Current and Ideal Culture in NWPA

A gap is the difference between the ideal culture (what is desired) and the current culture (what is present). Gaps are discrepancies between the values and behaviors that are expected or aspired to and those that are actually practiced.

Largest Gap – The largest gap between NWPA’s current culture and ideal culture was found in the Self-Actualizing style in Constructive Culture. Specifically, the items that had the largest gaps were:

- ❖ enjoy their work,
- ❖ resist conformity,
- ❖ think in unique and independent ways.

Second Largest Gap – The second largest gap between NWPA’s current culture and ideal culture was found in the Approval-oriented style in Passive/Defensive Culture in which conflicts are avoided and interpersonal relationships are pleasant.

Members feel they must agree with, gain the approval of, and be liked by others.

Specifically, the items that had the largest gaps were:

- ❖ “go along” with others,
- ❖ agree with everyone,
- ❖ do things for the approval of others.

WNY in 2019

The current culture has lower intensity and agreement among members regarding behaviors that are and are not expected. Generally speaking, when there is low agreement, the culture may not be so embedded to the degree that it would be very difficult to change.

Primary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Secondary Style – Affiliative

An Affiliative style characterizes organizations that place a high priority on constructive interpersonal relationships. Members are expected to be friendly, open, and sensitive to the satisfaction of their work group. An Affiliative style can enhance organizational performance by promoting open communication, cooperation, and the effective coordination of activities. Members are loyal to their work groups and feel they “fit in” comfortably.

Gaps Between Current and Ideal Culture in WNY

A gap is the difference between the ideal culture (what is desired) and the current culture (what is present). Gaps are discrepancies between the values and behaviors that are expected or aspired to and those that are actually practiced.

Largest Gap – The largest gap between WNY’s current culture and ideal culture was found in the Achievement style in Constructive Culture. An Achievement style characterizes organizations that do things well and value members who set and accomplish their own goals. Members of these organizations establish challenging but realistic goals, develop plans to reach these goals, and pursue them with enthusiasm. Specifically, the items that had the largest gaps were:

- ❖ pursue a standard of excellence,
- ❖ explore alternatives before acting,
- ❖ work for a sense of accomplishment.

Second Largest Gap – The second largest gap between WNY’s current culture and ideal culture was found in the Self-Actualizing style in Constructive Culture. A Self-Actualizing style characterizes organizations that value creativity, quality over quantity, and both task accomplishment and individual growth. Members of these organizations are encouraged to gain enjoyment from their work, develop themselves, and take on new and interesting activities. Specifically, the items that had the largest gaps were:

- ❖ think in unique and independent ways,
- ❖ communicate ideas,
- ❖ be open about self.

Partnership in 2021

The current culture had low intensity and agreement among members regarding behaviors that are and are not expected. Generally speaking, when there is low agreement, the culture may not be so embedded to the degree that it would be very difficult to change.

Primary Style – Humanistic-Encouraging

A Humanistic-Encouraging style characterizes organizations that are managed in a participative and person-centered way. Members are expected to be supportive, constructive, and open to influence in their dealings with others. This style leads to effective organizational performance by providing for the growth and active involvement of members who, in turn, report high satisfaction and commitment to the organization.

Secondary Style – Affiliative

An Affiliative style characterizes organizations that place a high priority on constructive interpersonal relationships. Members are expected to be friendly, open, and sensitive to the satisfaction of their work group. An Affiliative style can enhance organizational performance by promoting open communication, cooperation, and the effective coordination of activities. Members are loyal to their work groups and feel they “fit in” comfortably.

Gaps Between Current and Ideal Culture in the Partnership

A gap is the difference between the ideal culture (what is desired) and the current culture (what is present). Gaps are discrepancies between the values and behaviors that are expected or aspired to and those that are actually practiced.

Largest Gap – The largest gap between WNY’s current culture and ideal culture was found in the *Achievement* style in Constructive Culture. An *Achievement* style characterizes organizations that do things well and value members who set and accomplish their own goals. Members of these organizations establish challenging but realistic goals, develop plans to reach these goals, and pursue them with enthusiasm. Specifically, the items that had the largest gaps were:

- ❖ openly show enthusiasm,
- ❖ explore alternatives before acting,
- ❖ work for a sense of accomplishment.

Second Largest Gap – The second largest gap between Partnership’s current culture and ideal culture was found in the Self-Actualizing style in Constructive Culture. A Self-Actualizing style characterizes organizations that value creativity, quality over quantity, and both task accomplishment and individual growth. Members of these organizations are encouraged to gain enjoyment from their work, develop themselves, and take on new and interesting activities. Specifically, the items that had the largest gaps were:

- ❖ enjoy their work,
- ❖ think in unique and independent ways,
- ❖ communicate ideas.

Organizational Effectiveness Inventory

The Organizational Effectiveness Inventory assesses factors and conditions that influence, shape, and reinforce the diocese’s current operating culture and effectiveness including the impact on members. Organizational effectiveness describes the climate in the diocese.

The results compare the organization’s results to Human Synergistics’ historical averages (based on more than seven hundred organizations) and Constructive benchmarks (based on approximately 120 organizations with healthy cultures). The results measure Causal Factors and Outcomes.

Causal Factors

Causal Factors are those things that shape and reinforce the current operating culture and impact the effectiveness of the dioceses and the Partnership. The Organizational Effectiveness Inventory assesses thirty-one specific factors found to be causally related to culture.

Articulation of Mission

NWPA 2017	Better than average in the area of Articulation of Mission refers to the extent to which the organization's mission is clearly defined, illustrated by members, communicated by management, and understood by the organization.
WNY 2019	Better than average in the area of Articulation of Mission refers to the extent to which the organization's mission is clearly defined, illustrated by members, communicated by management, and understood by the organization.
Partnership 2021	Below average in the area of Articulation of Mission refers to the extent to which the organization's mission is clearly defined, illustrated by members, communicated by management, and understood by the organization.

Customer Service Focus

NWPA 2017	Average in the area of Customer Service Focus refers to the extent to which members believe that they are responsible for identifying and satisfying the needs of customers/clients/members.
WNY 2019	Below Average in the area of Customer Service Focus refers to the extent to which members believe that they are responsible for identifying and satisfying the needs of customers/clients/members.
Partnership 2021	Below Average in the area of Customer Service Focus refers to the extent to which members believe that they are responsible for identifying and satisfying the needs of customers/clients/members.

The Partnership scores are below average for both mission articulation and customer service focus which is notable.

Results Comparison to Historical Averages

NWPA 2017	Results are equal to or better than the Historical Averages for 24 of the 29 structures, systems, technology (job design), and skills/qualities that were measured.
WNY 2019	Results are equal to or better than the Historical Averages for 23 of the 29 structures, systems, technology (job design), and skills/qualities that were measured.
Partnership 2021	Results are equal to or better than the Historical Averages for 21 of the 29 structures, systems, technology (job design), and skills/qualities that were measured.

Most Favorable Causal Factor

NWPA 2017	Personal Bases of Power (sources of power that generally have positive effects) refers to the extent to which members are influenced due to their supervisors'/managers' technical expertise or competence (expert power); the respect they have for their supervisors/managers; and their supervisors'/managers' willingness to be influenced by them.
WNY 2019	Upward Communication refers to the effectiveness with which information is sent upward from employees to people in higher-level positions; put another way, diocesan leaders and staff believe their ideas, opinions, and information is being heard and received by those in top-level positions including the bishop.
Partnership 2021	Use of Punishment refers to the likelihood that mistakes will be accentuated and punished rather than analyzed and corrected (a favorable score signifies that people are highly unlikely to be punished).

Second Most Favorable Causal Factor

NWPA 2017	Use of Punishment refers to the likelihood that mistakes will be accentuated and punished rather than analyzed and corrected (a favorable score signifies that people are highly unlikely to be punished).
WNY 2019	Organizational Bases of Power refers to the extent to which members and staff are influenced because of their supervisors'/managers' control over outcomes. A favorable score for this item means members likely feel free from manipulation or coercion of an inappropriate nature.
Partnership 2021	Goal Challenge refers to the extent to which goals are fairly challenging rather than too easy or too difficult.

Least Favorable Causal Factor

NWPA 2017	Feedback refers to the degree to which carrying out their jobs directly provides members with information about their performance.
WNY 2019	Task Facilitation refers to the extent to which managers facilitate the work of their direct reports by helping them to solve problems and implement better procedures.
Partnership 2021	Total Influence refers to the average amount of influence by members across all organizational levels.

Second Least Favorable Causal Factor

NWPA 2017	Significance refers to the degree to which jobs are viewed by members as having an important impact on other people (either inside or outside of the organization).
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WNY 2019 Interaction Facilitation refers to the extent to which managers encourage their direct reports to work as a team and be supportive and cooperative.

Partnership 2021 Interdependence refers to the degree to which members must make decisions and cooperate with others in order to carry out their jobs.

Outcomes

Outcomes measure the effectiveness of the dioceses and Partnership at the individual, group, and organizational levels along criteria that influence long-term performance.

- ❖ Individual Outcomes – The data is a measurement of the extent to which the diocese or Partnership has a positive, rather than a negative, impact on its members. Positive measures include role clarity, motivation, satisfaction, and intention to stay. Negative measures include role conflict, stress, and job insecurity.
- ❖ Group Outcomes – The data is a measurement of the extent to which the diocese or Partnership effectively integrates and coordinates the efforts of its members and units. Specific measures include intra-unit teamwork and cooperation, inter-unit coordination, and department-level quality.
- ❖ Organizational Outcomes – The data is a measurement of the effectiveness of the diocese or Partnership with respect to its external environment. Specific measures include organizational-level quality and external adaptability.

Most Favorable Outcome

NWPA 2017 Satisfaction (Individual Outcome) refers to the extent to which members report positive appraisals of their work situation.

WNY 2019 Intention to Stay (Individual Outcome) refers to the extent to which members plan to remain with the organization.

Partnership 2021 Stress (Individual Outcome) refers to the extent to which members feel they are being pushed beyond their normal range of comfort by organizational demands, pressures, or conflicts.

Second Most Favorable Outcome

NWPA 2017 Intention to Stay (Individual Outcome) refers to the extent to which members plan to remain with the organization.

WNY 2019 Stress (Individual Outcome) refers to the extent to which members feel they are being pushed beyond their normal range of comfort by organizational demands, pressures, or conflicts.

Partnership 2021 Inter-unit Coordination (Group Outcome) refers to the extent to which people across sub-units cooperate to articulate inter-unit activities and minimize disruptions, delays, and interfaces.

Least Favorable Outcome

NWPA 2017 Organizational-level quality (Organizational Outcome) refers to the extent to which members believe the organization provides high-quality services and products to members.

WNY 2019 Organizational-level quality (Organizational Outcome) refers to the extent to which members believe the organization provides high-quality services and products to members.

Partnership 2021 Role clarity (Individual Outcome) refers to the extent to which members receive clear messages regarding what is expected of them.

Second Least Favorable Outcome

NWPA 2017	Departmental-level quality (Organizational Outcome) refers to the extent to which members believe that service provided by their own sub-unity (either to internal or external clients/members) are of the highest quality.
WNY 2019	External adaptability refers to the extent to which the organization effectively recognizes and responds to changes in its environment.
Partnership 2021	Organizational-level quality (Organizational Outcome) refers to the extent to which members believe the organization provides high-quality services and products to members.

APPENDIX C

PARTNERSHIP EVALUATION SURVEY

ALL RESULTS

Number of Participants = 397

Demographics

Q1 The survey asked for the participant's diocese.

- ❖ 68.77% (273 respondents) belong to WNY
- ❖ 31.23% (124 respondents) belong to NWPA

Q2 The survey inquired about participants' ministry (ordained/lay), offering three options:

- ❖ 76.07% (302 respondents) identified as lay
- ❖ 18.39% (73 respondents) identified as priest
- ❖ 5.54% (22 respondents) identified as deacon

Q17 The survey asked participants about their age. There were 344 responses, and 53 skipped the question.

- ❖ 63.95% (220 respondents) were 65 years or older
- ❖ 21.51% (74 respondents) were between 55-64 years old
- ❖ 7.27% (25 respondents) were between 45-54 years old
- ❖ 4.94% (17 respondents) were between 35-44 years old
- ❖ 2.33% (8 respondents) were between 25-34 years old
- ❖ 0.00% (0 respondents) were under 18 or between 18-24 years old

The majority of respondents are 65 years or older, with a small percentage in the younger age brackets. Eighty-five percent of respondents are 55 years or older.

Q18 The survey asked participants to identify their race/ethnicity. There were 344 responses, and 53 skipped the question.

- ❖ 95.06% (327 respondents) identified as White
- ❖ 2.33% (8 respondents) selected Multiple ethnicity / Prefer to self-describe
- ❖ 1.45% (5 respondents) identified as Black or African American
- ❖ 0.58% (2 respondents) identified as American Indian or Alaskan Native
- ❖ 0.29% (1 respondent) identified as Asian / Pacific Islander
- ❖ 0.29% (1 respondent) identified as Hispanic

The data shows that the vast majority of participants identify as White, with a minimal percentage selecting other racial or ethnic categories.

Participation

Q3 The survey asked participants to rate their level of participation in the Partnership. All 397 participants answered the question.

- ❖ 35.77% (142 respondents) occasionally participate in Partnership events
- ❖ 29.72% (118 respondents) are aware of the Partnership but do not participate in Partnership events
- ❖ 14.61% (58 respondents) often participate in Partnership events
- ❖ 12.09% (48 respondents) participate on a Partnership leadership body
- ❖ 7.81% (31 respondents) do not participate in the Partnership

The data shows that most participants have some level of engagement, with the highest percentage occasionally participating in Partnership events.

Q4 The survey asked participants in what ways they participate in the Partnership. There were 239 responses, and 158 skipped the question.

- ❖ 74.90% (179 respondents) have attended a diocesan convention
- ❖ 71.97% (172 respondents) have attended an event with people from both dioceses
- ❖ 61.92% (148 respondents) have attended a regional meeting
- ❖ 43.10% (103 respondents) have had their congregation receive resources as a result of the partnership
- ❖ 30.13% (72 respondents) have attended a regional training
- ❖ 27.62% (66 respondents) have served on a partnership committee or commission
- ❖ 8.37% (20 respondents) selected “Other”

This data shows that attending diocesan conventions and events involving both dioceses are the most common forms of participation, followed by regional meetings and training.

Satisfaction

Q5 The survey asked participants to rate their satisfaction with the Partnership on a scale of 1-5. There were 388 responses, and 9 skipped the question.

- ❖ 22.94% (89 respondents) are *Highly Satisfied*
- ❖ 28.61% (111 respondents) are *Satisfied*
- ❖ 25.77% (100 respondents) are *Neutral*
- ❖ 12.37% (48 respondents) are *Dissatisfied*
- ❖ 10.31% (40 respondents) are *Highly Dissatisfied*

The weighted average satisfaction score is 3.41, indicating that most respondents are generally satisfied, though there is a notable percentage of dissatisfied and neutral responses.

Q6 The survey asked participants who are dissatisfied with the partnership to identify the factors contributing to their dissatisfaction. There were 85 responses, and 312 skipped the question. The key factors contributing to dissatisfaction are:

- ❖ Does not benefit my congregation: 63.53% (54 respondents)
- ❖ Does not benefit my diocese: 57.65% (49 respondents)
- ❖ Sharing a bishop with another diocese: 51.76% (44 respondents)
- ❖ Relationship with the bishop: 47.06% (40 respondents)
- ❖ Little to no cost savings for my congregation: 45.88% (39 respondents)
- ❖ Little to no cost savings for my diocese: 38.82% (33 respondents)
- ❖ Few resources are available: 30.59% (26 respondents)
- ❖ Quality of partnership programs and initiatives: 27.06% (23 respondents)
- ❖ Experience with partnership staff: 24.71% (21 respondents)
- ❖ Personal relationships: 17.65% (15 respondents)
- ❖ Participating in an experiment: 10.59% (9 respondents)
- ❖ Serving on a governing body or committee: 2.35% (2 respondents)
- ❖ Other: 27.06% (23 respondents)

The most common reasons for dissatisfaction are related to the partnership not benefiting the congregation or diocese, lack of cost savings for the congregation or diocese, and challenges related to the shared bishop arrangement.

Twenty-three respondents cited other reasons for dissatisfaction with several recurring themes including leadership and governance practices, cultural and regional differences, communications, and lack of equity.

Q7 The survey asked participants who are satisfied with the partnership to identify the factors contributing to their satisfaction. There were 191 responses, and 206 skipped the question.

- ❖ Relationship with the bishop: 63.35% (121 respondents)
- ❖ Cost savings for the diocese: 59.69% (114 respondents)
- ❖ More resources are available: 51.83% (99 respondents)
- ❖ Participating in an experiment: 51.83% (99 respondents)
- ❖ Benefits to the diocese: 49.74% (95 respondents)
- ❖ Sharing a bishop with another diocese: 47.12% (90 respondents)
- ❖ Experience with partnership staff: 42.93% (82 respondents)
- ❖ Quality of partnership programs and initiatives: 39.79% (76 respondents)
- ❖ Personal relationships: 39.79% (76 respondents)
- ❖ Benefits to the congregation: 38.74% (74 respondents)
- ❖ Cost savings for the congregation: 29.84% (57 respondents)
- ❖ Serving on a governing body or committee: 15.18% (29 respondents)
- ❖ Other: 8.90% (17 respondents)

The primary contributors to satisfaction are relationship with the bishop, cost savings, availability of resources, participating in an experiment, and sharing a bishop with another diocese.

Seventeen respondents cited other reasons contributing to satisfaction with several recurring themes including showing a new way forward for the church, more opportunities to learn and grow in Christ, and opportunities provided by the Partnership during the COVID shutdown.

Collaboration Effectiveness

Q8 The survey asked participants to rate the effectiveness of collaboration between the dioceses. There were 370 responses, and 27 skipped the question.

- ❖ 15.68% (58 respondents) rated it as *Very Good*
- ❖ 33.51% (124 respondents) rated it as *Good*
- ❖ 28.11% (104 respondents) rated it as *Average*
- ❖ 15.41% (57 respondents) rated it as *Poor*
- ❖ 7.30% (27 respondents) rated it as *Very Poor*

The weighted average rating is 3.35, indicating that most respondents view the collaboration as good to average, with a significant percentage of responses (77.29%) rating collaboration as effective.

Support and Equity

Q9 The survey asked participants to rate their satisfaction with the support both dioceses provide to the Partnership (e.g., funding, staffing, resources). There were 370 responses, and 27 skipped the question.

- ❖ 13.51% (50 respondents) are *Highly Satisfied*
- ❖ 35.95% (133 respondents) are *Satisfied*
- ❖ 31.62% (117 respondents) are *Neutral*
- ❖ 14.59% (54 respondents) are *Dissatisfied*
- ❖ 0.04% (16 respondents) are *Highly Dissatisfied*

The weighted average satisfaction score is 3.40, suggesting that while many respondents are satisfied with the support, there are still concerns, particularly among those who are dissatisfied or neutral.

Q10 The survey asked participants to rate their satisfaction with the fairness of support distribution (e.g., funding, staffing, and resources) between the dioceses. There were 370 responses, and 27 skipped the question.

- ❖ 11.89% (44 respondents) are *Highly Satisfied*
- ❖ 30.27% (112 respondents) are *Satisfied*
- ❖ 33.24% (123 respondents) are *Neutral*
- ❖ 15.95% (59 respondents) are *Dissatisfied*
- ❖ 8.65% (32 respondents) are *Highly Dissatisfied*

The weighted average satisfaction score is 3.21, indicating a moderate level of satisfaction. While most are satisfied or neutral, nearly 25% are concerned about the fairness of the distribution.

Quality

Q11 The survey asked participants to rate the quality of partnership initiatives and programs. There were 365 responses, and 32 skipped the question.

- ❖ 12.60% (46 respondents) rated it as *Very Good*
- ❖ 35.62% (130 respondents) rated it as *Good*
- ❖ 33.70% (123 respondents) rated it as *Average*
- ❖ 14.52% (53 respondents) rated it as *Poor*
- ❖ 3.56% (13 respondents) rated it as *Very Poor*

The weighted average score is 3.39, suggesting that most respondents view the quality of partnership initiatives and programs as either good or average. There is a general positive outlook with 81.92% rating quality as average to very good.

Q12 The survey asked participants to rate the positive impact of partnership initiatives and programs. There were 365 responses, and 32 skipped the question.

- ❖ 10.14% (37 respondents) rated the impact as *Very High*
- ❖ 28.22% (103 respondents) rated the impact as *High*
- ❖ 36.16% (132 respondents) rated the impact as *Average*
- ❖ 19.18% (70 respondents) rated the impact as *Low*
- ❖ 6.30% (23 respondents) rated the impact as *Very Low*

The weighted average score is 3.17, indicating that while many respondents see a positive impact as average to high, there is a notable portion (25.48%) who view the impact as low or very low. Overall, the data suggests moderate enthusiasm for the positive effects of the partnership initiatives.

Impact

Q12 The survey asked participants if the Partnership has drawn them closer to Jesus Christ and God's mission. There were 365 responses, and 32 skipped the question.

- ❖ 8.22% (30 respondents) *Strongly Agree*
- ❖ 24.38% (89 respondents) *Agree*
- ❖ 35.07% (128 respondents) are *Neutral*
- ❖ 18.08% (66 respondents) *Disagree*
- ❖ 14.25% (52 respondents) *Strongly Disagree*

The weighted average score is 2.94, indicating that most respondents have a neutral or slightly negative view on how the Partnership has influenced their connection to Jesus Christ and God's mission. While a portion agree, many remain neutral or disagree, suggesting mixed or limited spiritual impact from the partnership.

Q14 The survey asked participants about the impact of the partnership on drawing their congregation closer to Jesus Christ and God's mission. There were 365 responses, and 32 skipped the question.

- ❖ 4.93% (18 respondents) *Strongly agree*
- ❖ 18.63% (68 respondents) *Agree*
- ❖ 43.56% (159 respondents) are *Neutral*
- ❖ 18.63% (68 respondents) *Disagree*
- ❖ 14.25% (52 respondents) *Strongly disagree*

The weighted average response is 2.81, indicating a slightly more negative or neutral overall sentiment about the Partnership's impact on drawing the congregation closer to Christ and God's mission.

Best Future for the Partnership

Q15 The survey asked participants their opinion on the best future for the Partnership. There were 364 responses, and 33 skipped the question.

- ❖ 34.89% (127 respondents) *Strongly Favor* continuing the Partnership
- ❖ 18.96% (69 respondents) *Somewhat Favor* continuing the Partnership
- ❖ 12.36% (45 respondents) are *Neutral* about continuing the Partnership
- ❖ 11.54% (42 respondents) *Somewhat Favor* dissolving the Partnership
- ❖ 22.25% (81 respondents) *Strongly Favor* dissolving the Partnership

The weighted average response is 3.33, indicating that a majority of respondents lean toward continuing the partnership, but with significant support for dissolving it as well.