The Episcopal Diocese of San Joaquin

The Central Third of California

67th Diocesan Convention Booklet

November 6-7, 2026

Episcopal Conference Center, Oakhurst



Welcome to the 67th Convention of the Episcopal Diocese of San Joaquin

Greetings in Christ!

Welcome to Diocesan Convention and to the beautiful campus of ECCO, nestled in the foothills of the central Sierras.

We are set for a weekend of fellowship and planning for the future of our Diocese. Diocesan Conventions are always wonderful events, as they bring together folks from across the Diocese in one place. They are a time to re-connect with old friends. They are a time to make new ones.

I'd like to introduce to you (for those who have not met her yet), the Rev. Nonhlanla (Noni) Shezi, the new priest-in-charge at St. John's, Stockton. Ordained to the priesthood and installed last month, Rev. Noni is a recent graduate of Virginia Theological Seminary and hails from South Africa, where she has extensive experience as a lay person. St. John's has welcomed her warmly as the answer to a prayer, having been without a priest for 7 years.

I'd also like to commend two long-serving priests who retired this year: the Rev. Suzie Ward of St. Paul's, Visalia and Fr. Bob Woods of St. Sherrian's, Kernville. Their years of tireless service to their congregations and to the Diocese are a blessing and witness. Also retiring, are the Rev. Deacon Nancy Key of St. James Cathedral, the Rev. Deacon Carolyn Woodall of St. James', Sonora and St. Clare's, Avery. Deacon Carolyn remains canonically resident here, although she has moved to Spain.

Along with the business meeting, I'm pleased to introduce the Rev. Gay Jennings, longtime friend and supporter of the Diocese, who will be addressing Convention and asking for input for materials that will help us put together a strategic plan for the Diocese. Also, I have asked the Rev. Brian Dawson to convene a group with membership from all three deaneries to assist in developing a mission and vision statement for the Diocese. Brian and that Committee are asking for input from you and all members of the Diocese as we shape a concise theological values statement that will be the basis for the strategic plan that will guide the Diocese towards its goals for the future.

There will be further announcements in my address and a special honor which will be awarded at the opening Holy Eucharist.

Again, welcome and safe travels as you make your way to ECCO. I look forward to seeing you and chairing my first Diocesan Convention as your bishop.

+Gregory



Table of Contents

67th Annual Convention Schedule....3

Business Meeting Agenda....4

Consent Agenda....5

St. James Cathedral Chapter Elections….....6

Voter's Guide....9

Treasurer's Report....10

- 2026 Budget vs. Actual....11
- 2026 Statement of Financial Position....16
- 2026 Statement of Activities....20
- 2027 Proposed Budget....26
- DDC Rep. Letter....30
- 2024 & 2025 Audit Report....32

Resolutions Committee Report....52

Reports to Diocesan Convention

- Standing Committee....53
- Diocesan Council....55
- Commission on Ministry....58
- Episcopal Conference Center Oakhurst....60
- Congregational Management Review....62
- Latino Missioner....63

Commission Reports

- SJRAISE....65
- Anti-Racism....67
- Creation Care....69
- Disability Inclusion....73
- LGBTQ+....75

Necrology Report....77

Clergy Certifications....78

Minutes of the 66th Annual Convention....81

67th Annual Convention Schedule

Friday

4 p.m. - Registration/Check-in is open, Commission displays in Dining Room

5 p.m. - Reception

6 p.m. - Dinner

7:15 p.m.

- **Bishop Greg Kimura's Opening Address**
- **Rev. Gay Jennings, Consultant, "Introducing the Discernment for a New Season Project"**
- **Rev. Brian Dawson, (Chair) EDSJ Vision & Mission Workgroup – "Dreaming About our Shared Future"**

8:30 p.m. - Compline

10 p.m. - Quiet Time

Saturday

8 a.m. - Breakfast

9:15 a.m. - Worship

10:30 a.m. - "Discernment for a New Season Project" data gathering and discussion, facilitated by The Rev. Gay Jennings (Lyles Hall)

Noon - Lunch

1 p.m. - Convention Business Meeting (Walters Chapel)

Business Meeting Agenda
November 7, 2026

1. The Chair calls the meeting to order
2. Explanation of Procedures for Convention
3. Introduction of new clergy and staff
4. Taking of Roll and Report of Quorum
5. Convention Appointments
6. Explanation of Voting Procedures & VPOLL Practice Vote
7. Motion to adopt the Agenda and Consent Agenda
8. Necrology Report
9. Report of Congregations in Arrears in Assessments
10. Matters requiring Confirmation by Diocesan Convention
11. Report of Committee on Nominations
12. Call for Nominations from the floor
13. Video Presentation - ECCO: Our Year 2026
14. First Ballot
15. Video Presentation - SJRAISE Immigration Commission
16. Results of First Ballot
17. Financial Reports and Motion to Approve Budget
18. Second Ballot (if needed)
19. Chancellor's Report
20. Report of Committee on Resolutions
21. Admission of late Resolutions from the floor
22. Video Presentation
23. Results of Second Ballot (if needed)
24. Third Ballot (if needed)
25. Reports by Title
26. Video Presentation
27. Results of Third Ballot (if needed)
28. Resolutions of Courtesy
29. Approval of Minutes of the 66th Annual Diocesan Convention of 2025
30. Certification of 2026 Minutes of Convention
31. Announcement of Organizational Meetings
32. Motion to set date and location of the 68th Annual Convention
33. Adjournment and Blessing

Organizational Meetings for Standing Committee and Diocesan Council are held in locations designated by Bishop Greg Kimura.

Consent Agenda Items

Required Vote: Simple Majority

Please Note: Items listed under the Consent Agenda are considered routine or otherwise. Each item will be read individually into the record of Convention and the Consent Agenda will then be enacted as a whole by one motion and one roll call. There will be no separate discussion of these items. If discussion and separate discussion by Convention is desired on any Consent Agenda item, any Delegate may request to remove that item, and such item will be removed from the Consent Agenda by the Chair of Convention and considered in its normal sequence under the Regular Order of Business.

RESOLUTION TO GRANT SEAT AND VOICE

Resolved, that as a courtesy, clergy who are currently licensed in this Diocese, all lay members of Standing Committee and Diocesan Council who are not delegates, lay members of the Commission on Ministry, and lay deputies to General Convention, representatives of Church of the Resurrection in Merced, an unorganized mission, and all clergy and lay persons registered with the Credentials Committee as official observers to this 67th Annual Convention, all be granted seat and voice at this Special Meeting of Convention of the Episcopal Diocese of San Joaquin, meeting at ECCO, November 7, 2026.

RESOLUTION TO LIMIT DEBATE

Resolved, that in order to provide adequate voice to as many officers, delegates, and official observers of the Convention as possible, debate on any item of the agenda shall be limited to two (2) minutes per person. Convention Delegates may give of their time to another, but no single individual may exceed five minutes on any one motion. As a matter of courtesy, motions to "Call the question" or "Call the previous question" is out of order as long as one or more delegates have been acknowledged by the moderator are in the queue awaiting a turn to speak, unless there have been already five persons speaking for and/or against the issue.

RESOLUTION ON DISPATCH OF BUSINESS

Resolved, that the Chair of Convention and the Committee on the Dispatch of Business are permitted flexibility in presenting and re-ordering the agenda in order to expedite the business of convention.

RESOLUTION TO WAIVE READING OF RESOLUTIONS

Resolved, that in the interest of expediting the business of the Convention, the reading of those Resolutions submitted prior to convention and available to delegates and voting clergy in the Convention Booklet will be waived.

RESOLUTION TO USE ELECTRONIC BALLOT

Resolved, that in accordance with Diocesan Canon 7.08, election ballots shall be electronic and administered by the VPOLL online voting platform, consistent with the Diocesan Canons and at the direction of the tellers.



Katharine Nelson

We came into the Cathedral family at the same time everyone returned here from "The Great Disruption" when my late husband, David, our children Alec & Elena and I moved here from New Mexico. I've been here long enough to see many disruptions – priests come and go, pandemics, fire, gas leaks....and yet, here we are. I have previously served on Chapter through some of these hard times and wasn't sure I wanted to do it again. Conflict, change and money are not "comfortable" topics for me yet seem to be inevitable in life. However, through my involvement as a delegate in the new Bishop election selection, serving on the pastoral care team and serving as a lay eucharistic minister, I feel emboldened to step up into the business side of things and help ensure our existence as a place where we truly feel God's presence. I offer my love of this congregation, my earnest attempts in discernment of God's will for us, my knowledge of our past and my hope in who we can be in Christ.



Shar Reagan

I have been a parishioner at St. James for about three years. I attend regularly with my husband Kellan and our children Quinton and Sasha. I currently chair the Sunday School program and care very much about families feeling welcome at the Cathedral. I have been honored to serve as a LEM for the past two years. I co-facilitated two formation series: Sacred Ground and Spiritual Resiliency. These series were inspired by my desire to have meaningful conversations with people about reconciliation and redemption. If elected to chapter, I will prioritize empowering the laity and promoting unity within the congregation (English and Spanish speaking) so that we can best fulfill our mission in the world.



Mirella Ocampo Ocamp

Hello, my name is Mirella Ocampo Ocampo. I am 49 years old, and my birthday is August 7. I was born in Iztapalapa, Mexico DF, but I grew up for 10 years in Acapulco, Guerrero, Mexico. I came to this country when I was 14 years old. I graduated from Cosmetology College and Barber College 27 years ago. I have 3 children, 2 German Shepherd dogs, and a husband. My husband, Pedro Huerta, is from Puebla, Mexico, and is a chef. My only son, Emmanuel, is 27 years old and has his own photography and videography business. My first daughter, Irery, is 20 years old and attends Fresno State University. My second daughter, Paloma, is 15 years old and is a sophomore at Buchanan High School. We have had our two German Shepherds, Nala and Lobo, since they were puppies. Nala is my girl and Lobo is my boy; they are my babies, the joy of my life, the love of my heart. We have been members of Saint James Episcopal Church since 2020. I will never forget the first time we met Padre Nelson in 2020 through a video call, inviting us to attend mass online due to the COVID-19 quarantine. Since then, my family and I have been active members, helping Padre Nelson with the organization and preparation of all masses and holiday traditions. Later that year, both of my daughters completed their Confirmation Sacrament with Padre Nelson. Currently, I am leading the first Comité Guadalupano Episcopal, a group of church members working hard to raise money for our Virgen de Guadalupe celebration. Since 2020, I have always tried to attend all the meetings and classes Padre Nelson offers to church members, and I also try to help in any way I can.



Daniel Jimenez

My name is Daniel Jiménez. I was born in Guadalajara, Jalisco, Mexico, and have been part of St. James Episcopal Cathedral since 2024. During this time, I have served as a reader during worship services, participated in the usher ministry of our Spanish-speaking congregation, and volunteered in organizing parish events and distributing food through our food pantry. As a member of the LGBTQ+ community, I have found in the Cathedral a place of acceptance, respect, and fellowship that I have not always experienced elsewhere. Here, I feel welcomed and valued for who I am, and this church has truly become my home and an important part of my life. As a member of the Cathedral Chapter, I am grateful for the opportunity to serve and committed to helping our community grow, encouraging greater participation among our members, and working to ensure that our church continues to be a place where everyone can find faith, hope, and a genuine sense of belonging.



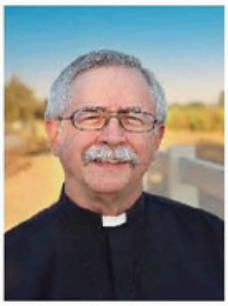
Priscilla Metry

Name is Priscilla Metry. I am 79 years old/young, widowed now, with 3 adult children and 5 grandchildren. I and have lived in Fresno since I came down for college in the mid sixties. I briefly taught and then changed direction and became a x-ray/ultrasound/ radiation therapy tech. I am what is called a cradle Episcopalian and have attended an Episcopal church for as long as I remember. I have participated in life in all the Fresno churches at different times. I moved over to St. James with the Holy Family members. I taught church school at St. Columba's, sang in choir, participated in altar guild and ECW. I sang in choir and led it for 15 y at St. Mary's. I have participated in ECW since the 60s and led it at St. Mary's. I participated in a diocesan performing group. I have participated in altar guild at the churches here in Fresno and relished the quiet time to prepare the altar and space for worship. I was elected to the vestry in 80's at St Mary's. I am now beginning my second term on St. James Chapter and am serving as Jr. Warden.

Voter's Guide

Nominees for Standing Committee - Clergy
4-year term – One seat

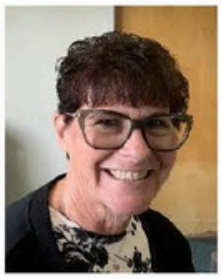
The Rev. Dcn. Tom Hampson - St. Paul's, Modesto



I served as the deacon at St. John's in Lodi for 5 and a half years before retiring in June of 2025. I am concluding a term on Diocesan Council. I helped to found and served as co-chair of SJRAISE, the diocesan immigration commission. I worked for Church World Service and the National Council of Churches for 31 years. Prior to that, I taught religion in a Catholic High School. I have a BA and an MA in theology from the University of Notre Dame. I reside in Modesto with my wife, Hennie Van Konynenburg, and attend St. Paul's. We have three children and three grandchildren. I love EDSJ for its courageous and prophetic leadership in building a world where all are welcome

Nominees for Standing Committee - Lay
4-year term – One seat

Ms. Tristan Kratz – St. Michael's, Ridgecrest



I am a baptized and confirmed member of St. Michael's, Ridgecrest, California . I am actively serving my second year on the Bishop's Committee (currently as clerk). I serve as a lay reader, and a community liaison in connecting the church with local philanthropic and social justice organizations. I am currently visiting the Cal City I.C.E. Detention Center detainees and am involved in the SJRAISE commission. I have worked in youth corrections as an advocate and counselor and have been teaching high school for 25 years.

Nominee for Diocesan Council – At-Large Lay
3-year term – One seat

No nominations received

Treasurer's Report

Nine-Month Budget Comparison, January to September 2026

•Through September we are about $112,000 behind budget. Nearly all of that is our asking to The Episcopal Church: $266,000 paid against $150,000 budgeted for the period, because the 2026 budget underestimated it. Set the asking aside and the rest of operations is on budget.
•Reserve dividends are $58,500 below budget.
•Income other than the Reserve covered about 16% of expenses. The other 84% came from the Reserve.

Reserve Account

•The Reserve stood at $22.2 million at the end of July. It has been restated to reflect market value; the books had carried it about $2.8 million low.
•Markets were kind this year: an unrealized gain of nearly $2 million year to date, despite a first-quarter loss of $690,000.
•Total withdrawal from the Reserve (dividends plus drawdown) is about 7.0% for 2026. The 2027 budget draws 7.7%.
•A sustainable rate is about 5%, the same rate the Church Center uses for its own funds. Bringing the draw down over several years is the most important financial work ahead of us.

Audits

•The 2025 audit was issued October 14, 2026. With it, four years of audits (2022 through 2025) have been issued since February 2025, and the backlog is closed.
•The opinion is qualified on two longstanding matters: original cost records do not exist for properties returned to the diocese after the litigation, and the national lay pension plan does not supply the actuarial disclosures the accounting rules call for.
•The auditors found no material weaknesses and no disagreements with management. They identified two areas to strengthen: posting the auditors' year-end adjustments to our books, and reconciling investment accounts monthly. We are working on both.

Assessments

•Assessments received through September total $200,533, about $9,500 below budget.
•Congregations not current by Convention will need action of Convention for seat, voice and vote.

Open Invoices

•Open invoices total $55,942 as of November 2, down from $91,479 at the end of July.
•About 70% of what remains is payroll the diocese advanced for one congregation's ministry, which the Bishop is working on directly. Most of the rest is October invoices not yet due.

ECCO

•Our conference center has improved four years running and posted a surplus in 2024. 2026 is tracking ahead of budget.

The Reserve is the proceeds of our own history, returned to us. Spending it carefully, and spending part of it on growth rather than only on keeping the lights on, is how we honor that gift. Thank you to Jan Dunlap and the Finance Committee, and to Alisa Sparks, for their work this year.

Joe Kieta, Diocesan Treasurer

The Episcopal Diocese of San Joaquin

Budget vs. Actuals: Statement of Activities

January - September, 2026

	TOTAL		
	ACTUAL	BUDGET	REMAINING
Income			
40000 Income			
41000 Assessment	200,533	210,000	9,467
46000 Event and Registration Income			
46010 Diocesan Convention	25		-25
46040 Conference and Meetings	634		-634
Total 46000 Event and Registration Income	**659**		**-659**
46500 EDSJ Commissions			
46502 SJRaise - Immigration Commission	9,255		-9,255
46502-1 EMM Grant Income	15,250		-15,250
Total 46502 SJRaise - Immigration Commission	**24,505**		**-24,505**
Total 46500 EDSJ Commissions	**24,505**		**-24,505**
47000 Interest Income	2,540	4,875	2,335
47500 Diocesan Reserve Dividends	635,221	693,750	58,529
Total 40000 Income	**863,458**	**908,625**	**45,167**
44500 Refunds & Reimbursements	694	2,625	1,931
46600 Other Grants, Gifts and bequests	146		-146
46601 Zita Turtle Trust Grant	16,800		-16,800
Total 46600 Other Grants, Gifts and bequests	**16,946**		**-16,946**
48010 Reserve Account Drawdown Income	542,242	537,341	-4,901
Total Income	**$1,423,340**	**$1,448,591**	**$25,251**
GROSS PROFIT	**$1,423,340**	**$1,448,591**	**$25,251**
Expenses			
50000 Expenses			
51000 Ministry in the World			
51020 TEC Asking	266,003	150,000	-116,003
51030 General Convention Expense		8,250	8,250
51040 Lambeth Expense		1,500	1,500
51050 Staff Conference expense	300		-300
Total 51000 Ministry in the World	**266,303**	**159,750**	**-106,553**
52000 Ministry in the Diocese			
52020 Latino Ministry	6,734	9,750	3,016
52025 Latino Grant Expenses	87		-87
Total 52020 Latino Ministry	**6,820**	**9,750**	**2,930**
52040 Story of the Yellow Bag		225	225
52100 Mission Support			
52102 Bakersfield, St. Paul's	9,000	9,000	0
52106 Turlock, St. Francis	22,500	22,500	0
52107 Sonora, St. James	11,250	11,250	0
52108 Taft, St. Andrew's	15,750	15,750	0
52112 Tulare, St. John	7,500	7,500	0
52113 Visalia, St. Paul	7,500	7,500	0

The Episcopal Diocese of San Joaquin

Budget vs. Actuals: Statement of Activities

January - September, 2026

	TOTAL		
	ACTUAL	BUDGET	REMAINING
52170 Buildings & Grounds Grant	7,500		-7,500
Total 52100 Mission Support	**81,000**	**73,500**	**-7,500**
52200 EDSJ Commission Support	13		-13
52201 Anti-Racism Commission (ARC) Expense	580	3,750	3,170
52202 SJRaise (Immigration Commission) Expense	6,621	7,500	879
52202-1 EMM Grant Expenses	6,254		-6,254
52202-2 Immigration Legal Defense Exp	4,000		-4,000
Total 52202 SJRaise (Immigration Commission) Expense	**16,875**	**7,500**	**-9,375**
52220 Creation Care Commission (CCC) Expense	1,053	3,750	2,697
Total 52200 EDSJ Commission Support	**18,521**	**15,000**	**-3,521**
52400 Leadership Development			
52198 Ministry Education	1,750	1,313	-437
52401 Clergy Retreat	1,287	2,625	1,338
52402 Conference and Meeting	2,810		-2,810
52403 Leadership Workshops	1,000	750	-250
52405 New Clergy Development	2,000	1,500	-500
52406 Ministry Retreats	-192		192
Total 52400 Leadership Development	**8,656**	**6,188**	**-2,468**
52500 Diocesan Governance			
52501 Diocesan Convention	720	3,000	2,280
52502 Commission on Ministry	132	2,250	2,118
52503 Diocesan Council	148	375	227
52504 Standing Committee	381	375	-6
52507 Bishop Search	34,277	37,500	3,223
Total 52500 Diocesan Governance	**35,658**	**43,500**	**7,842**
52600 Clergy Support Grants			
52601 Bakersfield, St. Paul's	37,125	37,125	0
52602 Stockton, St. John's	12,815	37,500	24,685
52603 Hanford, Church of the Saviour	22,500	22,500	0
52604 San Andreas, St Matthew's	12,395	11,250	-1,145
52605 Ridgecrest, St. Michael's	41,357	22,500	-18,857
52606 Turlock, St. Francis	3,896	41,356	37,461
52607 Sonora, St. James	23,645	38,291	14,646
52609 Modesto, St. Paul's	11,290	9,000	-2,290
52610 Lodi, St. John the Baptist	45,000	22,500	-22,500
52630 Visalia, St. Paul	8,393	37,500	29,107
Total 52600 Clergy Support Grants	**218,415**	**279,522**	**61,107**
52650 Seminarian Support Grant	20,196		-20,196
52700 Cathedral	207,500	187,500	-20,000
Total 52000 Ministry in the Diocese	**596,766**	**615,184**	**18,418**
Total 50000 Expenses	**863,069**	**774,934**	**-88,135**
53000 Ministry of the Bishop			

The Episcopal Diocese of San Joaquin

Budget vs. Actuals: Statement of Activities

January - September, 2026

	TOTAL		
	ACTUAL	BUDGET	REMAINING
53100 Administrative Expenses	35		-35
53102 Auditing/CPA Fees	56,866	30,900	-25,966
53103 Bank Fees/Charges	6,629	3,825	-2,804
53103b Melio services fee	144		-144
Total 53103 Bank Fees/Charges	**6,773**	**3,825**	**-2,948**
53104 Communication (adobe, Web, etc)	3,279	3,150	-129
53105 Dues and Subscriptions	2,225	2,250	25
53107 Equip/Software/Furn	1,394	1,500	106
53108 Outside Services	1,415	563	-853
53110 Office Supplies	1,922	1,125	-797
53111 Payroll Service Fees	225		-225
53112 Postage	181	563	382
53114 Printing/Copying		225	225
53115 Property/Liability Insurance	24,640	15,000	-9,640
53116 Property Taxes	3,959	7,313	3,354
53117 Telephone/Internet	1,810	2,625	815
53118 Workman's Comp Expense	6,310	1,875	-4,435
53199 Benefits--Retirees	237		-237
54015 Title IV Matters		11,250	11,250
Total 53100 Administrative Expenses	**111,270**	**82,162**	**-29,107**
53200 Payroll Expense	3,602		-3,602
53210 Bishop			
53211 Bishop Stipend	156,704	127,500	-29,204
53212 Bishop Pension	25,650	22,950	-2,700
53213 Bishop Benefits	38,375	27,985	-10,391
53214 Bishop Expenses	28,475	15,000	-13,475
53216 Bishop Continuing Education	249	1,500	1,251
53217 Bishop Payroll Taxes	11,284	9,754	-1,530
53218 Bishop Sabbatical		1,500	1,500
Total 53210 Bishop	**260,736**	**206,188**	**-54,548**
53220 Canon			
53221 Canon Stipend	93,962	90,791	-3,171
53222 Canon Pension	11,309	16,336	5,027
53223 Canon Benefits	8,075	12,570	4,496
53224 Canon Expenses	10,396	7,500	-2,896
53226 Canon Continuing Education	1,184	1,500	316
53227 Canon Payroll Taxes	7,188	6,765	-423
Total 53220 Canon	**132,113**	**135,462**	**3,349**
53230 Administrator			
53231 Administrator Salary	21,814	20,654	-1,160
53232 Administrator Payroll Taxes	804	1,580	776
53233 Administrator Pension		2,478	2,478
53237 Admin Continuing Education	3,427	1,500	-1,927

The Episcopal Diocese of San Joaquin

Budget vs. Actuals: Statement of Activities

January - September, 2026

	TOTAL		
	ACTUAL	BUDGET	REMAINING
Total 53230 Administrator	**26,045**	**26,213**	**167**
53250 Latino Missioner			
53251 Latino Missioner Salary	54,468	54,633	165
53252 Latino Missioner Payroll tax	4,167	4,180	13
53253 Latino Missioner Pension	9,834	9,834	0
53254 Latino Missioner Benefits	19,760	20,556	797
53255 Latino Missioner Expenses	3,042	5,625	2,583
53257 Latino Missioner Continuing Education		1,500	1,500
Total 53250 Latino Missioner	**91,270**	**96,328**	**5,058**
Total 53200 Payroll Expense	**513,766**	**464,190**	**-49,576**
53300 Vehicle Expense	-4,591		4,591
53310 Vehicle Insurance	2,299	2,625	326
53320 Vehicle Maintenance	4,889	1,875	-3,014
53330 Vehicle Registration		345	345
53350 Vehicle/Equipment Expense		26,250	26,250
Total 53300 Vehicle Expense	**2,597**	**31,095**	**28,498**
Total 53000 Ministry of the Bishop	**627,632**	**577,448**	**-50,185**
54000 Legal Expenses			
54010 Legal Fees	61,539	97,500	35,961
Total 54000 Legal Expenses	**61,539**	**97,500**	**35,961**
69800 Uncategorized Expenses	799		-799
Total Expenses	**$1,553,039**	**$1,449,882**	**$ -103,157**
NET OPERATING INCOME	**$ -129,699**	**$ -1,291**	**$128,408**
Other Income			
45000 Bishop Discretionary Donations	6,819		-6,819
90000 DFMS Other Fund Dividends	10		-10
90005 Tongi Trust DFMS 1180 Dividends	9,585		-9,585
Total 90000 DFMS Other Fund Dividends	**9,595**		**-9,595**
90500 Unrealized Investment Gain/Loss			
90501 Dio Reserve DFMS 1178	1,971,088		-1,971,088
90502 Clipper DFMS 1179 Unrealized Gain/Loss	46,188		-46,188
90503 Togni DFMS 1180 Unrealized Gain/Loss	-1,633		1,633
90504 Mary Zita Turtle DFMS 1181 Unrealized Gain/Loss	24,069		-24,069
90505 ECCO DFMS 1182 Unrealized Gain/Loss	124,209		-124,209
90506 Bakersfield DFMS 1197 Unrealized Gain/Loss	9,584		-9,584
90507 St. Claire Feather's Trust DFMS 1323	57,055		-57,055
Total 90500 Unrealized Investment Gain/Loss	**2,230,558**		**-2,230,558**
91000 Church Investments Gains/Losses			
91001 St. Matthew's, Gain/ Loss	39,630		-39,630
Total 91000 Church Investments Gains/Losses	**39,630**		**-39,630**
94000 Merced, Church o/t Resurrection			

The Episcopal Diocese of San Joaquin

Budget vs. Actuals: Statement of Activities

January - September, 2026

	TOTAL		
	ACTUAL	BUDGET	REMAINING
94001 Pledge income	12,836		-12,836
Total 94000 Merced, Church o/t Resurrection	**12,836**		**-12,836**
Other Income	33,905		-33,905
Total Other Income	**$2,333,343**	**$0**	**$ -2,333,343**
Other Expenses			
53120 Bishop Discretionary Expenses	17,354		-17,354
57000 Reserve Account Drawdown Withdrawal	542,242	0	-542,242
M10000 Merced, Church of Resurrection			
110002 Rent Expense	6,750		-6,750
110003 Mission Expense	814		-814
110004 Supply Expense	1,350		-1,350
110005 Other expense	145		-145
Total M10000 Merced, Church of Resurrection	**9,059**		**-9,059**
Total Other Expenses	**$568,655**	**$0**	**$ -568,655**
NET OTHER INCOME	**$1,764,688**	**$0**	**$ -1,764,688**
NET INCOME	**$1,634,989**	**$ -1,291**	**$ -1,636,280**

Note
Management Use Only - No Assurance

The Episcopal Diocese of San Joaquin

Statement of Financial Position
As of Sep 30, 2026

	TOTAL		
	As of Sep 30, 2026	As of Sep 30, 2025 (PY)	$ Change (PY)
Assets			
Current Assets			
Bank Accounts			
10000 Operations Accounts	$0	$0	$0
10100 Operating Acct 53004439	97,439	69,110	28,329
10300 Payroll Acct 2007441	263,264	279,904	-16,640
10500 Stripe	0	2,239	-2,239
11111 DFMS 1178-Diocesan Reserve	21,967,928	20,220,622	1,747,306
11500 Charles Schwab Acct 8787	83,022	185,198	-102,176
Total for 10000 Operations Accounts	**$22,411,653**	**$20,757,074**	**$1,654,580**
11000 Restricted Accounts			
10200 Bishop Dis Acct 52007433	6,459	18,783	-12,324
10600 Emergency Relief Fund/PVB/UMB -4682	8,804	8,804	0
11112 DFMS 1182-ECCO Res	1,054,697	1,027,845	26,851
11113 DFMS 1181-Mary Z Turtle Trust	250,206	164,792	85,414
11115 DFMS 1179-Clipper Trust	367,320	318,792	48,529
11116 DFMS 1180-Togni Rem Trust	76,229	66,158	10,071
11117A DFMS 1323 St. Clare's Avery Feathers Trust	484,467	433,389	51,078
11117 DFMS 1197-St. Paul, Bakersfield	76,218	66,149	10,070
11118 SSGA St. Matthew's	457,738	414,252	43,486
11130 Merrill Lynch	0	21	-21
Total for 11000 Restricted Accounts	**$2,782,137**	**$2,518,984**	**$263,153**
Total Bank Accounts	**$25,193,791**	**$23,276,058**	**$1,917,733**
Accounts Receivable			
12000 Accounts Receivable	74,859	70,134	4,725
Total Accounts Receivable	**$74,859**	**$70,134**	**$4,725**
Other Current Assets			
12001 Undeposited Funds	4,755	0	4,755
12100 Dividends Receivable	226,608	197,360	29,248
12700 Allowance for Bad Debt	0	-250,000	250,000
13000 Prepaid Expenses	0	-6,568	6,568
13500 Reimbursable/Billable Costs	54	29,356	-29,302
Loan - St. James Cathedral	0	11,920	-11,920
Total Other Current Assets	**$231,417**	**-$17,932**	**$249,349**
Total Current Assets	**$25,500,067**	**$23,328,260**	**$2,171,808**

The Episcopal Diocese of San Joaquin

Statement of Financial Position
As of Sep 30, 2026

	TOTAL		
	As of Sep 30, 2026	As of Sep 30, 2025 (PY)	$ Change (PY)
Fixed Assets			
14000 Fixed Assets			
14100 Furniture and Equipment	6,251	422	5,829
14200 Computers	2,752	1,181	1,571
14300 Vehicles	119,856	40,001	79,855
14400 Acc. Depreciation- Computers	-2,412	-11,037	8,625
14500 Acc. Depreciation Furn & Equip	-5,829	0	-5,829
14600 Acc. Depreciation-Vehicles	-57,314	0	-57,314
Total for 14000 Fixed Assets	**$63,305**	**$30,568**	**$32,737**
15000 Buildings - Operating			
15010 St. Paul's, Bakersfield	5,790,200	5,790,200	0
15030 Ridgecrest, St. Michael's	1,682,900	1,682,900	0
15040 Sonora, St. James Church	2,232,000	2,232,000	0
15050 Stockton, St John Church	7,935,200	7,935,200	0
15060 Turlock, St. Francis	3,366,476	3,366,476	0
15090 Lodi, St. John the Baptist	5,123,900	5,123,900	0
15100 San Andreas	1,007,742	1,007,742	0
15110 Stockton, St. Anne's	2,242,400	2,242,400	0
15120 Hanford, Church of the Saviour	3,095,600	3,095,600	0
15130 Avery, St Clare of Assisi	442,300	442,300	0
15140 Tulare, St. John's	1,102,400	1,102,400	0
15150 Taft, St. Andrew's/ Rectory	475,000	475,000	0
15160 Modesto, St. Paul's and School	5,127,700	5,127,700	0
15170 Fresno, St. James Cathedral	3,925,000	3,925,000	0
15180 Fresno, 709 Jackson St. Martin	120,836	121,808	-972
15410 ECCO	4,650,000	4,650,000	0
15430 Visalia, St. Paul's	3,941,600	3,941,600	0
15900 A/D Improvements	-49,150,239	-49,129,415	-20,824
15920 A/d Other	-437,550	-437,550	0
Total for 15000 Buildings - Operating	**$2,673,465**	**$2,695,260**	**-$21,796**
Total Fixed Assets	**$2,736,770**	**$2,725,828**	**$10,942**
Other Assets			
14950 NR St. John's Lodi Bank of Stockton loan	1,334,012	-100,080	1,434,092
Total Other Assets	**$1,334,012**	**-$100,080**	**$1,434,092**
Total Assets	**$29,570,849**	**$25,954,008**	**$3,616,841**

The Episcopal Diocese of San Joaquin

Statement of Financial Position
As of Sep 30, 2026

	TOTAL		
	As of Sep 30, 2026	As of Sep 30, 2025 (PY)	$ Change (PY)
Liabilities and Equity			
Liabilities			
Current Liabilities			
Accounts Payable			
20001 Accounts Payable	10,917	32,088	-21,171
Total Accounts Payable	**$10,917**	**$32,088**	**-$21,171**
Credit Cards			
11110 Credit Card			
11101 Security First Credit Card	0	2,229	-2,229
Citizens Business Bank Credit Card -2873	1,599	5,303	-3,704
Total for 11110 Credit Card	**$1,599**	**$7,532**	**-$5,933**
Ramp Card	536		536
Total Credit Cards	**$2,134**	**$7,532**	**-$5,397**
Other Current Liabilities			
20000 Current Liabilities	$25	$0	$25
21000 Pass Through Donations/Expenses	-$2,257	-$2,257	$0
21010 EYE23 Donation	240	240	0
21020 Pilgrimage Partners	467	467	0
21030 United Thank Offering	200	0	200
21050 Registration Pass-through	50	50	0
21070 C. Schwab Stock Pass-Thru Acc	45	45	0
21090 Episcopal Relief & Development	465	265	200
21110 Mary Zita Turtle	0	16,800	-16,800
21130 Emergency Relief Fund	7,885	7,885	0
21170 Ordination Donations	1,897	1,897	0
Total for 21000 Pass Through Donations/Expenses	**$8,992**	**$25,392**	**-$16,400**
Total for 20000 Current Liabilities	**$9,017**	**$25,392**	**-$16,375**
24100 Payroll Liabilities	$524	$0	$524
24140 Vacation/Holiday Liability	0	0	0
Total for 24100 Payroll Liabilities	**$524**	**$0**	**$525**
27210 Lodi St Johns Clergy Grant	0	15,000	-15,000
California Department of Tax and Fee Administration Payable	21	0	21
Total Other Current Liabilities	**$9,562**	**$40,392**	**-$30,829**
Total Current Liabilities	**$22,613**	**$80,011**	**-$57,398**

The Episcopal Diocese of San Joaquin

Statement of Financial Position
As of Sep 30, 2026

	TOTAL		
	As of Sep 30, 2026	As of Sep 30, 2025 (PY)	$ Change (PY)
Long-term Liabilities			
27200 Other Liabilities	6,212	650	5,562
27300 Refundable Deposits Payable	3,500	3,500	0
2895 NP Bank of Stockton on behalf of St John's Lodi	1,334,012	1,444,202	-110,190
Total Long-term Liabilities	**$1,343,724**	**$1,448,352**	**-$104,628**
Total Liabilities	**$1,366,338**	**$1,528,363**	**-$162,025**
Equity			
30001 Unrestricted Opening Balance	723,424	724,655	-1,231
30100 Prior Year Adjustments	-3,327	-3,327	0
32500 ECCO DFMS Invested	823,124	823,124	0
35000 Designated Funds			
35010 Vehicle/Equipment Fund	19,743	19,743	0
35020 Cycles of Leadership	670	670	0
35040 Diocesan Altar Guild	1,468	1,468	0
35050 Discretionary Funds	5,478	5,478	0
35060 General Convention	13,355	13,355	0
35080 Hispanic Ministry	19,755	19,755	0
35110 Lambeth/Sabbatical	12,214	12,214	0
35120 Postulant Book Fund	412	412	0
Total for 35000 Designated Funds	**$73,095**	**$73,095**	**$0**
36000 Custodial Fund Balances			
36004 TogniTrust Reserved	59,156	59,156	0
36005 Bakersfield Reserved	5,299	5,299	0
36006 St. Matthew's Reserved	304,552	304,552	0
36007 St. Clare's Avery Feathers Trust	324,864	324,864	0
Total for 36000 Custodial Fund Balances	**$693,870**	**$693,870**	**$0**
37000 Donor Restricted Funds			
37002 Mary Z Turtle Restricted	120,024	120,024	0
37003 Clipper Trust Restricted	232,187	232,187	0
Total for 37000 Donor Restricted Funds	**$352,211**	**$352,211**	**$0**
32000 Unrestricted Net Assets	23,907,126	20,367,432	3,539,694
Net Income	1,634,989	1,394,585	240,404
Total Equity	**$28,204,511**	**$24,425,645**	**$3,778,866**
Total Liabilities and Equity	**$29,570,849**	**$25,954,008**	**$3,616,841**

Note
Management Use Only - No Assurance

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
Income			
40000 Income			
41000 Assessment	200,533	191,845	8,689
46000 Event and Registration Income			
46010 Diocesan Convention	25	25	0
46040 Conference and Meetings	634		634
Total for 46000 Event and Registration Income	**$659**	**$25**	**$634**
46500 EDSJ Commissions			
46502 SJRaise - Immigration Commission	$9,255	$3,020	$6,235
46502-1 EMM Grant Income	15,250		15,250
Total for 46502 SJRaise - Immigration Commission	**$24,505**	**$3,020**	**$21,485**
Total for 46500 EDSJ Commissions	**$24,505**	**$3,020**	**$21,485**
47000 Interest Income	2,540	3,278	-738
47500 Diocesan Reserve Dividends	635,221	640,888	-5,667
Total for 40000 Income	**$863,458**	**$839,055**	**$24,403**
44500 Refunds & Reimbursements	694	877	-183
46600 Other Grants, Gifts and bequests	$146	$23,671	-$23,526
46601 Zita Turtle Trust Grant	16,800	16,800	0
Total for 46600 Other Grants, Gifts and bequests	**$16,946**	**$40,471**	**-$23,526**
46700 Sales of Products		28	-28
48010 Reserve Account Drawdown Income	542,242		542,242
Total Income	**$1,423,340**	**$880,431**	**$542,909**
Gross Profit	**$1,423,340**	**$880,431**	**$542,909**
Expenses			
50000 Expenses			
51000 Ministry in the World			
51020 TEC Asking	266,003	103,507	162,496
51050 Staff Conference expense	300		300
Total for 51000 Ministry in the World	**$266,303**	**$103,507**	**$162,796**
52000 Ministry in the Diocese			
52020 Latino Ministry	$6,734	$4,202	$2,532
52025 Latino Grant Expenses	87	276	-189

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
Total for 52020 Latino Ministry	**$6,820**	**$4,478**	**$2,342**
52100 Mission Support			
52101 Avery, St. Clare's of Assisi		2,250	-2,250
52102 Bakersfield, St. Paul's	9,000	13,527	-4,527
52103 Madera, Holy Trinity		5,468	-5,467
52104 Oakhurst, St. Raphael's		4,050	-4,050
52106 Turlock, St. Francis	22,500	25,814	-3,313
52107 Sonora, St. James	11,250	9,315	1,935
52108 Taft, St. Andrew's	15,750	15,750	0
52109 Stockton, St. John's		5,250	-5,250
52110 Hanford, ECoS		7,500	-7,500
52112 Tulare, St. John	7,500	7,500	0
52113 Visalia, St. Paul	7,500	7,500	0
52170 Buildings & Grounds Grant	7,500	70,259	-62,759
Total for 52100 Mission Support	**$81,000**	**$174,182**	**-$93,182**
52200 EDSJ Commission Support	$13		$13
52201 Anti-Racism Commission (ARC) Expense	580	658	-78
52202 SJRaise (Immigration Commission) Expense	$6,621	$4,151	$2,470
52202-1 EMM Grant Expenses	6,254		6,254
52202-2 Immigration Legal Defense Exp	4,000		4,000
Total for 52202 SJRaise (Immigration Commission) Expense	**$16,875**	**$4,151**	**$12,724**
52220 Creation Care Commission (CCC) Expense	1,053	3,622	-2,569
Total for 52200 EDSJ Commission Support	**$18,521**	**$8,430**	**$10,090**
52400 Leadership Development			
52198 Ministry Education	1,750	1,750	0
52401 Clergy Retreat	1,287	1,512	-225
52402 Conference and Meeting	2,810		2,810
52403 Leadership Workshops	1,000	59	941
52405 New Clergy Development	2,000		2,000
52406 Ministry Retreats	-192		-192
Total for 52400 Leadership Development	**$8,656**	**$3,321**	**$5,335**
52500 Diocesan Governance			
52501 Diocesan Convention	720	720	0
52502 Commission on Ministry	132	895	-763
52503 Diocesan Council	148	160	-11
52504 Standing Committee	381		381
52507 Bishop Search	34,277	33,164	1,113

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
Total for 52500 Diocesan Governance	**$35,658**	**$34,938**	**$720**
52600 Clergy Support Grants			
52601 Bakersfield, St. Paul's	37,125	37,125	0
52602 Stockton, St. John's	12,815		12,815
52603 Hanford, Church of the Saviour	22,500	20,000	2,500
52604 San Andreas, St Matthew's	12,395	11,250	1,145
52605 Ridgecrest, St. Michael's	41,357	41,357	0
52606 Turlock, St. Francis	3,896	30,342	-26,446
52607 Sonora, St. James	23,645	22,500	1,145
52609 Modesto, St. Paul's	11,290	9,000	2,290
52610 Lodi, St. John the Baptist	45,000		45,000
52630 Visalia, St. Paul	8,393	11,250	-2,857
Total for 52600 Clergy Support Grants	**$218,415**	**$182,823**	**$35,592**
52650 Seminarian Support Grant	20,196	9,200	10,996
52700 Cathedral	$207,500	$187,500	$20,000
53240 Dean			
53241 Dean Stipend		53,333	-53,333
53242 Dean Payroll Taxes		4,080	-4,080
53243 Dean Pension		9,600	-9,600
Total for 53240 Dean		**$67,013**	**-$67,013**
Total for 52700 Cathedral	**$207,500**	**$254,513**	**-$47,013**
Total for 52000 Ministry in the Diocese	**$596,766**	**$671,887**	**-$75,121**
Total for 50000 Expenses	**$863,069**	**$775,394**	**$87,675**
53000 Ministry of the Bishop			
53100 Administrative Expenses	$35		$35
53102 Auditing/CPA Fees	56,866	50,075	6,791
53103 Bank Fees/Charges	$6,629	$577	$6,053
53103b Melio services fee	144	166	-21
Total for 53103 Bank Fees/Charges	**$6,773**	**$742**	**$6,031**
53104 Communication (adobe, Web, etc)	3,279	4,473	-1,194
53105 Dues and Subscriptions	2,225	3,005	-780
53107 Equip/Software/Furn	1,394	969	425
53108 Outside Services	1,415	320	1,095
53110 Office Supplies	1,922	2,167	-245
53111 Payroll Service Fees	225		225
53112 Postage	181	86	94

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
53115 Property/Liability Insurance	24,640	15,186	9,454
53116 Property Taxes	3,959	3,914	45
53117 Telephone/Internet	1,810	2,304	-494
53118 Workman's Comp Expense	6,310	2,285	4,025
53199 Benefits--Retirees	237	237	0
Total for 53100 Administrative Expenses	**$111,270**	**$85,762**	**$25,508**
53200 Payroll Expense	$3,602		$3,602
53210 Bishop			
53211 Bishop Stipend	156,704	111,667	45,037
53212 Bishop Pension	25,650	20,250	5,400
53213 Bishop Benefits	38,375	25,637	12,739
53214 Bishop Expenses	28,475	17,794	10,680
53216 Bishop Continuing Education	249		249
53217 Bishop Payroll Taxes	11,284	8,574	2,709
Total for 53210 Bishop	**$260,736**	**$183,922**	**$76,814**
53220 Canon			
53221 Canon Stipend	93,962	70,413	23,549
53222 Canon Pension	11,309	12,722	-1,414
53223 Canon Benefits	8,075	11,714	-3,639
53224 Canon Expenses	10,396	7,256	3,140
53226 Canon Continuing Education	1,184	1,956	-772
53227 Canon Payroll Taxes	7,188	5,387	1,801
Total for 53220 Canon	**$132,113**	**$109,447**	**$22,665**
53230 Administrator			
53231 Administrator Salary	21,814	1,739	20,075
53232 Administrator Payroll Taxes	804	85	719
53237 Admin Continuing Education	3,427		3,427
Total for 53230 Administrator	**$26,045**	**$1,824**	**$24,221**
53250 Latino Missioner			
53251 Latino Missioner Salary	54,468	52,973	1,495
53252 Latino Missioner Payroll tax	4,167	4,052	114
53253 Latino Missioner Pension	9,834	9,287	546
53254 Latino Missioner Benefits	19,760	21,405	-1,645
53255 Latino Missioner Expenses	3,042	2,802	239
53257 Latino Missioner Continuing Education		227	-227
Total for 53250 Latino Missioner	**$91,270**	**$90,747**	**$523**
Total for 53200 Payroll Expense	**$513,766**	**$385,940**	**$127,825**

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
53300 Vehicle Expense	-$4,591		-$4,591
53310 Vehicle Insurance	2,299	2,854	-555
53320 Vehicle Maintenance	4,889	1,220	3,668
53330 Vehicle Registration		363	-363
Total for 53300 Vehicle Expense	**$2,597**	**$4,438**	**-$1,841**
Total for 53000 Ministry of the Bishop	**$627,632**	**$476,140**	**$151,492**
54000 Legal Expenses			
54010 Legal Fees	61,539	117,541	-56,002
Total for 54000 Legal Expenses	**$61,539**	**$117,541**	**-$56,002**
69800 Uncategorized Expenses	799		799
Total Expenses	**$1,553,039**	**$1,369,075**	**$183,964**
Net Operating Income	**-$129,699**	**-$488,644**	**$358,945**
Other Income			
45000 Bishop Discretionary Donations	6,819	3,147	3,672
90000 DFMS Other Fund Dividends	$10	$8	$3
90005 Tongi Trust DFMS 1180 Dividends	9,585	3,404	6,181
Total for 90000 DFMS Other Fund Dividends	**$9,595**	**$3,411**	**$6,184**
90500 Unrealized Investment Gain/Loss			
90501 Dio Reserve DFMS 1178	1,971,088	1,689,342	281,746
90502 Clipper DFMS 1179 Unrealized Gain/Loss	46,188	37,114	9,074
90503 Togni DFMS 1180 Unrealized Gain/Loss	-1,633	4,298	-5,932
90504 Mary Zita Turtle DFMS 1181 Unrealized Gain/Loss	24,069	19,185	4,884
90505 ECCO DFMS 1182 Unrealized Gain/Loss	124,209	86,765	37,444
90506 Bakersfield DFMS 1197 Unrealized Gain/Loss	9,584	7,997	1,587
90507 St. Claire Feather's Trust DFMS 1323	57,055	36,584	20,470
Total for 90500 Unrealized Investment Gain/Loss	**$2,230,558**	**$1,881,285**	**$349,273**
91000 Church Investments Gains/Losses			
91001 St. Matthew's, Gain/ Loss	39,630	46,692	-7,063
Total for 91000 Church Investments Gains/Losses	**$39,630**	**$46,692**	**-$7,063**
94000 Merced, Church o/t Resurrection			
94001 Pledge income	12,836	7,148	5,688
Total for 94000 Merced, Church o/t Resurrection	**$12,836**	**$7,148**	**$5,688**
Other Income	33,905	3	33,902
Total Other Income	**$2,333,343**	**$1,941,687**	**$391,656**
Other Expenses			
53120 Bishop Discretionary Expenses	17,354	2,510	14,844
57000 Reserve Account Drawdown Withdrawal	542,242		542,242
90400 Investment Pass Throughs		20,908	-20,908

The Episcopal Diocese of San Joaquin

Statement of Activities
January-September, 2026

	TOTAL		
	Jan 1 - Sep 30 2026	Jan 1 - Sep 30 2025 (PY YTD)	$ Change (PY YTD)
97000 Other Expenses/Corrections		25,000	-25,000
M10000 Merced, Church of Resurrection			
110002 Rent Expense	6,750	6,750	0
110003 Mission Expense	814	2,089	-1,276
110004 Supply Expense	1,350	1,200	150
110005 Other expense	145		145
Total for M10000 Merced, Church of Resurrection	**$9,059**	**$10,039**	**-$981**
Total Other Expenses	**$568,655**	**$58,458**	**$510,197**
Net Other Income	**$1,764,688**	**$1,883,229**	**-$118,541**
Net Income	**$1,634,989**	**$1,394,585**	**$240,404**

Note
Management Use Only - No Assurance

The Episcopal Diocese of San Joaquin
2027 Budget

	2026 Amended Budget	2027 Budget	Difference
Income			
40000 Income			
41000 Assessment	280,000	270,000	-10,000
47000 Interest Income	6,500	5,500	-1,000
47500 Diocesan Reserve Dividends	925,000	850,000	-75,000
Reserve Percentage		3.83%	
44500 Refunds & Reimbursements	3,500	2,500	-1,000
DFMS Drawdown	716,455	858,598	142,143
Drawdown Percentage 22,217,928 value of DFMS		3.86%	
Total Income	1,931,455	1,986,598	55,143
Expenses			
50000 Expenses			
51000 Ministry in the World			
51020 TEC Asking	200,000	250,000	50,000
51030 General Convention Expense	11,000	11,000	0
51040 Lambeth Expense	2,000	2,000	0
Total 51000 Ministry in the World	213,000	263,000	50,000
52000 Ministry in the Diocese			
52020 Latino Ministry	13,000	13,000	0
52040 Story of the Yellow Bag	300	0	-300
52100 Mission Support			
52102 Bakersfield, St. Paul's	12,000	10,200	-1,800
52106 Turlock, St. Francis	30,000	25,500	-4,500
52107 Sonora, St. James	15,000	12,750	-2,250
52108 Taft, St. Andrew's	21,000	21,000	0
52112 Tulare, St. John	10,000	10,000	0
52113 Visalia, St. Paul	10,000	8,500	-1,500
Total 52100 Mission Support	98,000	87,950	-10,050
52200 EDSJ Commission Support			
52201 Anti-Racism Commission	5,000	3,000	-2,000
52202 SJRaise (Immigration	10,000	10,000	0

The Episcopal Diocese of San Joaquin
2027 Budget

	2026 Amended Budget	2027 Budget	Difference
52203 Creation Care Commission	5,000	3,000	-2,000
52204 LGBTQ+ Commission		4,000	4,000
52205 Disability Inclusion Commission		3,500	3,500
Total 52200 EDSJ Commission Support	20,000	23,500	3,500
52400 Leadership Development			
52198 Ministry Education EfM	1,750	1,750	0
52401 Clergy Retreat	3,500	3,500	0
52403 Leadership Workshops	1,000	1,000	0
52405 New Clergy Development	2,000	2,000	0
Total 52400 Leadership Development	8,250	8,250	0
52500 Diocesan Governance			
52501 Diocesan Convention	4,000	3,000	-1,000
52502 Commission on Ministry	3,000	3,000	0
52503 Diocesan Council	500	500	0
52504 Standing Committee	500	500	0
52507 Bishop Search	50,000	30,000	-20,000
Total 52500 Diocesan Governance	58,000	37,000	-21,000
52600 Clergy Support Grants			
52601 Bakersfield, St. Paul's	49,500	49,500	0
52602 Stockton,St. John	50,000	55,000	5,000
52603 Hanford, Church of the Saviour	30,000	30,000	0
52604 San Andreas	15,000	7,500	-7,500
52605 Ridgecrest, St. Michael's	55,142	60,172	5,030
52606 Turlock, St. Francis	51,054	27,397	-23,657
52607 Sonora	30,000	30,000	0
52609 Modesto, St. Paul's	12,000	12,000	0
52610 Lodi, St. John the Baptist	30,000	60,000	30,000
52630 Visalia, St. Paul	50,000	50,000	0
Total 52600 Clergy Support Grants	372,696	381,569	8,873
52700 Cathedral	250,000	200,000	-50,000
Total 52000 Ministry in the Diocese	820,246	751,269	-68,978

The Episcopal Diocese of San Joaquin
2027 Budget

	2026 Amended Budget	2027 Budget	Difference
53000 Ministry of the Bishop			
53100 Administrative Expenses			
53102 Auditing/CPA Fees	41,200	71,000	29,800
53103 Bank Fees/Charges	5,100	7,220	2,120
53104 Communication (adobe, Web, etc)	4,200	6,000	1,800
53105 Dues and Subscriptions	3,000	4,600	1,600
53107 Equip/Software/Furn	2,000	2,000	0
53108 Outside Services	750	750	0
53110 Office Supplies	1,500	3,000	1,500
53112 Postage	750	500	-250
53114 Printing/Copying	300	0	-300
53115 PropertyLiability Insurance	20,000	33,000	13,000
53116 Property Taxes	9,750	10,000	250
53117 Telephone/Internet	3,500	3,000	-500
53118 Worker's Comp Expense	2,500	6,000	3,500
54015 Title IV Matters	15,000	15,000	0
Total 53100 Administrative Expenses	109,550	162,070	52,520
53200 Payroll Expense			
53210 Bishop			
53211 Bishop Stipend	172,500	180,000	7,500
53212 Bishop Pension	31,050	32,400	1,350
53213 Bishop Benefits	38,108	43,740	5,633
53214 Bishop Expenses	20,000	20,000	0
53216 Bishop Continuing Ed	2,000	2,000	0
53217 Bishop Payroll Taxes	13,196	14,400	1,204
53218 Bishop Sabbatical	2,000	2,000	0
Total 53210 Bishop	278,854	294,540	15,686
53220 Canon			
53221 Canon Stipend	117,910	120,000	2,090
53222 Canon Pension	21,224	21,600	376
53223 Canon Benefits	15,630	18,000	2,370

The Episcopal Diocese of San Joaquin
2027 Budget

	2026 Amended Budget	2027 Budget	Difference
53224 Canon Expenses	10,000	20,000	10,000
53226 Canon Continuing Education	2,000	2,000	0
53227 Canon Payroll Taxes	9,020	9,600	580
Total 53220 Canon	175,784	191,200	15,416
53230 Administrator			
53231 Administrator Salary	27,539	31,000	3,461
53232 Administrator Payroll Taxes	2,107	2,480	373
53233 Administrator Pension	2,478	2,790	312
53237 Administrator Continuing	2,000	2,000	0
Total 53230 Administrator	34,124	38,270	4,146
53250 Latino Missioner			
53251 Latino Missioner Salary	72,844	87,500	14,656
53252 Latino Missioner Payroll tax	5,573	7,000	1,427
53253 Latino Missioner Pension	13,112	15,750	2,638
53254 Latino Missioner Benefits	27,408	28,500	1,092
53255 Latino Missioner Expenses	7,500	7,500	0
53257 Latino Missioner Continuing Ed	2,000	2,000	0
Total 53250 Latino Missioner	128,436	148,250	19,814
Total 53200 Payroll Expense	617,198	672,260	55,062
53300 Vehicle Expense	35,000		-35,000
53310 Vehicle Insurance	3,500	4,500	1,000
53320 Vehicle Maintenance	2,500	3,000	500
53330 Vehicle Registration	460	500	40
Total 53300 Vehicle Expense	41,460	8,000	-33,460
Total 53000 Ministry of the Bishop	768,208	842,330	74,122
54000 Legal Expenses			
54010 Legal Fees	130,000	130,000	0
Total 54000 Legal Expenses	130,000	130,000	0
Total Expenses	1,931,454	1,986,599	55,144
Net Operating Income	0	0	0

The Episcopal Diocese of San Joaquin
Fresno, California

October 14, 2026

DeMera DeMera Cameron, LLP
5080 North Fruit, Suite 101
Fresno, California 93711

Gentlemen:

This representation letter is provided in connection with your audit of the financial statements of Episcopal Diocese of San Joaquin, which comprise the statements of financial position as of December 31, 2025 and 2024, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the disclosures (collectively, the "financial statements"), for the purpose of expressing an opinion as to whether the financial statements are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States (U.S. GAAP).

Certain representations in this letter are described as being limited to matters that are material. Items are considered to be material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be changed or influenced by the omission or misstatement. An omission or misstatement that is monetarily small in amount could be considered material as a result of qualitative factors.

We confirm, to the best of our knowledge and belief, as of October 14, 2026, the following representations made to you during your audit.

Financial Statements

1) We have fulfilled our responsibilities, as set out in the terms of the audit engagement letter dated January 22, 2026, including our responsibility for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP.
2) The financial statements referred to above are fairly presented in conformity with U.S. GAAP.
3) We acknowledge our responsibility for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.
4) We acknowledge our responsibility for the design, implementation, and maintenance of internal control to prevent and detect fraud.
5) The methods, significant assumptions, and data used in making accounting estimates and their related disclosures are appropriate to achieve recognition, measurement, or disclosure that is reasonable in accordance with U.S. GAAP.
6) Related-party relationships and transactions have been appropriately accounted for and disclosed in accordance with U.S. GAAP.
7) All events subsequent to the date of the financial statements and for which U.S. GAAP requires adjustment or disclosure have been adjusted or disclosed.
8) The effects of all known actual or possible litigation, claims, and assessments have been accounted for and disclosed in accordance with U.S. GAAP.
9) Material concentrations have been appropriately disclosed in accordance with U.S. GAAP.
10) Guarantees, whether written or oral, under which the Organization is contingently liable, have been properly recorded or disclosed in accordance with U.S. GAAP.

Information Provided

11) We have provided you with:
    a) Access to all information, of which we are aware, that is relevant to the preparation and fair presentation of the financial statements, such as records (including information obtained from outside of the general and subsidiary ledgers), documentation, and other matters.
    b) Additional information that you have requested from us for the purpose of the audit.

c) Unrestricted access to persons within the Organization from whom you determined it necessary to obtain audit evidence.

d) Minutes of the meetings of the governing board or summaries of actions of recent meetings for which minutes have not yet been prepared.

12) All material transactions have been recorded in the accounting records and are reflected in the financial statements.

13) We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.

14) We have no knowledge of any fraud or suspected fraud that affects the Organization and involves:

a) Management,

b) Employees who have significant roles in internal control, or

c) Others where the fraud could have a material effect on the financial statements.

15) We have no knowledge of any allegations of fraud or suspected fraud affecting the Organization's financial statements communicated by employees, former employees, grantors, regulators, or others.

16) We have no knowledge of any instances of noncompliance or suspected noncompliance with laws and regulations whose effects should be considered when preparing financial statements.

17) We have disclosed to you all known actual or possible litigation, claims, and assessments whose effects should be considered when preparing the financial statements.

18) We have disclosed to you the names of all of the Organization's related parties and all the related-party relationships and transactions, including any side agreements.

19) In regards to drafting the financial statements and footnotes, proposing adjusting journal entries, performing bookkeeping services (i.e., calculating and recording of depreciation and posting less than material entries while cleaning up the books), and any other non-attest services performed by you, we have:

- Assumed all management responsibilities.
- Designated an individual (within senior management) with suitable skill, knowledge, or experience to oversee the services.
- Evaluated the adequacy and results of the services performed.
- Accepted responsibility for the results of the services.
- Ensured that the data and records are complete and we have sufficient information to oversee the services.

20) The Organization has satisfactory title to all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged as collateral.

21) We are responsible for compliance with the laws, regulations, and provisions of contracts and grant agreements applicable to us.

22) Episcopal Diocese of San Joaquin is an exempt organization as part of The Protestant Episcopal Church in the United States of America as an unincorporated association and has an explicit federal "group" tax exemption under the Internal Revenue Code. Any activities of which we are aware that would jeopardize the Organization's tax-exempt status, and all activities subject to tax on unrelated business income or excise or other tax, have been disclosed to you. All required filings with tax authorities are up-to-date as applicable.

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Joe Kieta, Treasurer

DEMERA DEMERA CAMERON

Certified Public Accountants

Partners
Michael R. Davin, CPA
Shelley M. Nakaguchi, CPA
Andrew G. Cameron, CPA
Evin Edwards II, CPA
Kip J. Martin, CPA

Senior Tax Managers
Tim Downum, CPA
Balvir K. Bains, CPA
Cynthia Wiederhold, CPA

Certified Professional Staff
Titus M. Verzosa, CPA (Retired)
Lisa R. Garabedian, CPA
Tammy Bibb, CPA
Diana Wong, CPA
Tyler Valladao, CPA
Mitchell Bibb, CPA

Of Counsel
Howard J. DeMera, CPA (Retired)
Mark D. Cameron, CPA (Retired)

DeMera DeMera Cameron, LLP
5080 N. Fruit Ave., Ste. 101
Fresno, CA 93711

(559) 226-9200
(559) 226-9209
mail@ddccpa.com
www.ddccpa.com

October 14, 2026

To The Diocese Council and Management of
The Episcopal Diocese of San Joaquin

We have audited the financial statements of The Episcopal Diocese of San Joaquin for the year ended December 31, 2025 and have issued our report thereon dated October 14, 2026. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated January 22, 2026. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by The Episcopal Diocese of San Joaquin are described in Note 1 to the financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2025. We noted no transactions entered into by the Organization during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the financial statements in the proper period.

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the financial statements were:

Management's estimate of property is based on as-is market value or insurance values as historical cost cannot be obtained. We evaluated the key factors and these assumptions used in determining that it is reasonable in relation to the financial statements taken as a whole.

Management's estimate of investments is measured at fair value, as stated on investment statements, and is subject to market fluctuation.

The financial statement disclosures are neutral, consistent, and clear.

Difficulties Encountered in Performing the Audit

We encountered no significant difficulties in dealing with management in performing and completing our audit.

Corrected and Uncorrected Misstatements

Professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that are trivial, and to communicate them to the appropriate level of management. Management has corrected all such misstatements. In addition, none of the misstatements detected as a result of audit procedures and corrected by management were material, either individually or in the aggregate, to the financial statements taken as a whole.

Disagreements with Management

For purposes of this letter, a disagreement with management is a disagreement on a financial accounting, reporting or auditing matter, whether or not resolved to our satisfaction that could be significant to the financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated October 14, 2026.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the Organization's financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the Organization's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

This information is intended solely for the use of the Diocese Council and Management of The Episcopal Diocese of San Joaquin and is not intended to be, and should not be, used by anyone other than these specified parties.

DEMERA DEMERA CAMERON, LLP

Shelley Nakaguchi

Shelley Nakaguchi, CPA
Partner

DEMERA DEMERA CAMERON

Certified Public Accountants

Partners
Michael R. Davin, CPA
Shelley M. Nakaguchi, CPA
Andrew G. Cameron, CPA
Evin Edwards II, CPA
Kip J. Martin, CPA

Senior Tax Managers
Tim Downum, CPA
Balvir K. Bains, CPA
Cynthia Wiederhold, CPA

Certified Professional Staff
Titus M. Verzosa, CPA (Retired)
Lisa R. Garabedian, CPA
Tammy Bibb, CPA
Diana Wong, CPA
Tyler Valladao, CPA
Mitchell Bibb, CPA

Of Counsel
Howard J. DeMera, CPA (Retired)
Mark D. Cameron, CPA (Retired)

DeMera DeMera Cameron, LLP
5080 N. Fruit Ave., Ste. 101
Fresno, CA 93711

(559) 226-9200
(559) 226-9209
mail@ddccpa.com
www.ddccpa.com

To the Board of Directors and Management of
Episcopal Diocese of San Joaquin

In planning and performing our audit of the financial statements of Episcopal Diocese of San Joaquin as of and for the year ended December 31, 2025, in accordance with auditing standards generally accepted in the United States of America, we considered Episcopal Diocese of San Joaquin's system of internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

Our consideration of internal control was for the limited purpose described in the preceding paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and, therefore, material weaknesses or significant deficiencies may exist that were not identified. However, as discussed below, we identified certain deficiencies in internal control that we consider to be significant deficiencies.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's financial statements will not be prevented, or detected and corrected, on a timely basis. We did not identify any deficiencies in internal control that we consider to be material weaknesses.

A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance. We consider the following deficiencies in Episcopal Diocese of San Joaquin's internal control to be significant deficiencies:

Auditor Adjusting Journal Entries Should be Posted to The Books

We provide adjusting journal entries with the trial balance for your review and approval. Once approved, and the financial statements finalized, adjusting journal entries should be posted to your books.

Investment Activity Should be Recorded and Reconciled Monthly

During our audit, we requested investment statements. Upon review of the statements, adjusting journal entries were posted to agree to the December 31, 2025. Reconciliation of general ledger and investment statements should be completed on a timely basis to provide assurance that all transactions have been entered by the brokerage house and recorded in the books properly.

This communication is intended solely for the information and use of management, the board of directors, and others within the organization, and is not intended to be, and should not be, used by anyone other than these specified parties.

DeMera DeMera Cameron, LLP

Fresno, California
October 14, 2026

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

FINANCIAL STATEMENTS

DECEMBER 31, 2025 AND 2024

DEMERA DEMERA CAMERON

Certified Public Accountants

Partners
Michael R. Davin, CPA
Shelley M. Nakaguchi, CPA
Andrew G. Cameron, CPA
Evin Edwards II, CPA
Kip J. Martin, CPA

Senior Tax Managers
Tim Downum, CPA
Balvir K. Bains, CPA
Cynthia Wiederhold, CPA

Certified Professional Staff
Titus M. Verzosa, CPA (Retired)
Lisa R. Garabedian, CPA
Tammy Bibb, CPA
Diana Wong, CPA
Tyler Valladao, CPA
Mitchell Bibb, CPA

Of Counsel
Howard J. DeMera, CPA (Retired)
Mark D. Cameron, CPA (Retired)

DeMera DeMera Cameron, LLP
5080 N. Fruit Ave., Ste. 101
Fresno, CA 93711

(559) 226-9200
(559) 226-9209
mail@ddccpa.com
www.ddccpa.com

INDEPENDENT AUDITOR'S REPORT

The Rt. Reverend David Rice and Board of Directors
The Episcopal Diocese of San Joaquin
Fresno, California

Qualified Opinion

We have audited the accompanying financial statements of The Episcopal Diocese of San Joaquin, (a nonprofit organization), which comprise the statements of financial position as of December 31, 2025 and 2024, and the related statements of activities and changes in net assets, functional expenses and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, except for the effects of property and equipment being adjusted to as is market value or insurance values when The Episcopal Diocese of San Joaquin regained ownership of certain property in 2015 through 2023, and the effect of inadequate disclosures for defined benefit pension plans and post-retirement benefits in the financial statements as described in the Basis for Qualified Opinion section of our report, the financial statements referred to in the first paragraph present fairly, in all material respects, the financial position of The Episcopal Diocese of San Joaquin as of December 31, 2025 and 2024, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Qualified Opinion

As more fully described in Note 1 to the financial statements, the information to state property and equipment at historical cost cannot be obtained. Property and equipment were adjusted to as is market value or insurance values when The Episcopal Diocese of San Joaquin regained ownership of certain property in 2015 through 2023. The records documenting cost are not available, and as a result, the effects on the accompanying financial statements have not been determined.

The Episcopal Diocese of San Joaquin's actuary does not provide adequate disclosures for defined benefit pension plans and post-retirement benefits in accordance with accounting principles generally accepted in the United States of America, specifically related to The Episcopal Church Lay Employees' Retirement Plan. The effects of these departures are not reasonably determinable.

We conducted our audit in accordance with accounting standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of The Episcopal Diocese of San Joaquin and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our qualified audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about The Episcopal Diocese of San Joaquin's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of The Episcopal Diocese of San Joaquin's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about The Episcopal Diocese of San Joaquin's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Dempra Dempra Cameron, LLP

Fresno, California
October 14, 2026

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Financial Position

December 31, 2025 and 2024

	2025					2024				
	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Total
				Assets						
Cash	$ 357,316	$ 10,511	$ 421,821	$ -	$ 789,648	$ 3,568,966	$ 10,179	$ 406,264	$ -	$ 3,985,409
Accounts receivable, net of allowance for credit losses of $-0- and $9,872 as of December 31, 2025 and 2024, respectively	378,406	-	1,040	-	379,446	324,236	-	429	-	324,665
Due from net assets without donor restrictions	-	-	-	38,800	38,800	-	-	-	41,200	41,200
Current portion of notes receivable (Note 2)	62,873	-	-	-	62,873	60,260	-	-	-	60,260
Prepaid expenses	-	-	2,500	-	2,500	17,168	-	5,000	-	22,168
Deposit and other assets	-	-	20,000	-	20,000	-	-	-	-	-
Investments, at fair value (Note 1)	21,690,996	1,496,142	-	-	23,187,138	16,692,453	1,306,933	-	-	17,999,386
Current assets	22,489,591	1,506,653	445,361	38,800	24,480,405	20,663,083	1,317,112	411,693	41,200	22,433,088
Notes receivable - net of current portion (Note 2)	1,271,139	-	-	-	1,271,139	1,330,297	-	-	-	1,330,297
Property and equipment (Note 3)	2,698,535	-	1,063,444	-	3,761,979	2,717,992	-	1,112,597	-	3,830,589
Right-of-use asset, operating lease (Note 6)	-	-	159,632	-	159,632	-	-	-	-	-
Total assets	$ 26,459,265	$ 1,506,653	$ 1,668,437	$ 38,800	$ 29,673,155	$ 24,711,372	$ 1,317,112	$ 1,524,290	$ 41,200	$ 27,593,974

(continued)

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Financial Position - Continued

December 31, 2025 and 2024

	2025					2024				
	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Total
Liabilities and Net Assets										
Accounts payable	$ 45,533	$ -	$ 66,573	$ -	$ 112,106	$ 27,710	$ -	$ 22,006	$ -	$ 49,716
Due to net assets with donor restrictions	-	-	38,800	-	38,800	-	-	41,200	-	41,200
Accrued liabilities	7,031	-	48,991	-	56,022	18,500	-	48,125	-	66,625
Deferred income	-	-	66,390	-	66,390	-	-	68,391	-	68,391
Funds held for others	8,592	-	-	-	8,592	27,207	-	-	-	27,207
Operating lease liability, current portion (Note 6)	-	-	64,546	-	64,546	-	-	-	-	-
Current portion of notes payable (Note 4)	62,873	-	-	-	62,873	60,260	-	-	-	60,260
Current liabilities	124,029	-	285,300	-	409,329	133,677	-	179,722	-	313,399
Operating lease liability, net of current portion (Note 6)	-	-	93,576	-	93,576	-	-	-	-	-
Notes payable - net of current portion (Note 4)	1,271,139	-	-	-	1,271,139	1,330,297	-	-	-	1,330,297
Total liabilities	1,395,168	-	378,876	-	1,774,044	1,463,974	-	179,722	-	1,643,696
Net assets										
Without donor restrictions:										
Board designated	896,219	-	-	-	896,219	1,003,262	-	-	-	1,003,262
Undesignated	24,167,878	-	1,289,561	-	25,457,439	22,244,136	-	1,344,568	-	23,588,704
With donor restrictions:										
Restricted	-	1,506,653	-	38,800	1,545,453	-	1,317,112	-	41,200	1,358,312
Total net assets	25,064,097	1,506,653	1,289,561	38,800	27,899,111	23,247,398	1,317,112	1,344,568	41,200	25,950,278
Total liabilities and net assets	$ 26,459,265	$ 1,506,653	$ 1,668,437	$ 38,800	$ 29,673,155	$ 24,711,372	$ 1,317,112	$ 1,524,290	$ 41,200	$ 27,593,974

See accompanying notes and independent auditor's report

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Activities and Changes in Net Assets

For the Years Ended December 31, 2025 and 2024

	2025						2024				
	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Elimination	Total	Without Donor Restrictions	With Donor Restrictions	ECCO Without Donor Restrictions	ECCO With Donor Restrictions	Total
Revenues, gain & other support											
Diocesan assessments	$ 267,730	$ -	$ -	$ -	$ -	$ 267,730	$ 284,811	$ -	$ -	$ -	$ 284,811
Guest fees	-	-	1,708,991	-	-	1,708,991	-	-	1,805,772	-	1,805,772
Donations	65,363	-	6,478	7,200	-	79,041	34,291	3,550	3,657	6,000	47,498
Events	25	-	-	-	-	25	13,075	-	-	-	13,075
Investment earnings (expense), net	3,317,291	204,552	46,169	-	-	3,568,012	1,552,284	96,659	45,006	-	1,693,949
Other income (expense), net	7,476	-	32,014	-	[1] (20,000)	19,490	23,458	-	8,958	-	32,416
Total program activities	3,657,885	204,552	1,793,652	7,200	(20,000)	5,643,289	1,907,919	100,209	1,863,393	6,000	3,877,521
Net assets released from restrictions:											
Satisfaction of purpose restriction	15,011	(15,011)	2,626	(2,626)	-	-	3,571	(3,571)	(2,416)	2,416	-
Total support and revenue	3,672,896	189,541	1,796,278	4,574	(20,000)	5,643,289	1,911,490	96,638	1,860,977	8,416	3,877,521
Expenses:											
Program services	1,505,177	-	1,152,711	-	[1] (20,000)	2,637,888	1,566,227	-	1,190,945	-	2,757,172
Supporting services	351,020	-	698,574	-	-	1,049,594	280,765	-	628,639	-	909,404
Designated expenses	-	-	-	6,974	-	6,974	284	-	-	4,616	4,900
Total expenses	1,856,197	-	1,851,285	6,974	(20,000)	3,694,456	1,847,276	-	1,819,584	4,616	3,671,476
Change in net assets	1,816,699	189,541	(55,007)	(2,400)	-	1,948,833	64,214	96,638	41,393	3,800	206,045
Net assets at beginning of year as previously reported	23,247,398	1,317,112	1,344,568	41,200	-	25,950,278	20,365,636	1,195,474	1,303,175	37,400	22,901,685
Prior period adjustment (Note 10)	-	-	-	-	-	-	2,817,548	25,000	-	-	2,842,548
Net assets at beginning of year as restated	23,247,398	1,317,112	1,344,568	41,200	-	25,950,278	23,183,184	1,220,474	1,303,175	37,400	25,744,233
Net assets at end of year	$ 25,064,097	$ 1,506,653	$ 1,289,561	$ 38,800	$ -	$ 27,899,111	$ 23,247,398	$ 1,317,112	$ 1,344,568	$ 41,200	$ 25,950,278

[1] To eliminate Diocese's grant to ECCO.

See accompanying notes and independent auditor's report

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Functional Expenses

For the Years Ended December 31, 2025 and 2024

	2025				2024			
		Supporting Services				Supporting Services		
	Program Services	Management and General	Fundraising	Total	Program Services	Management and General	Fundraising	Total
Bishop and Canon ministry compensation	$ 392,053	$ -	$ -	$ 392,053	$ 365,185	$ -	$ -	$ 365,185
Administrative support	5,530	-	-	5,530	42,615	-	-	42,615
Ministry convention	43,378	-	-	43,378	13,469	-	-	13,469
Our mission and the congregation	264,051	-	-	264,051	348,453	-	-	348,453
Our mission in the world	116,190	-	-	116,190	201,440	-	-	201,440
Cathedral support	250,000	-	-	250,000	250,000	-	-	250,000
Clergy retreat	2,338	-	-	2,338	17,766	-	-	17,766
Clergy support	235,044	-	-	235,044	174,819	-	-	174,819
Dean	66,563	-	-	66,563	-	-	-	-
Latino Missioner	120,830	-	-	120,830	102,953	-	-	102,953
Curate for Latino Ministries	-	-	-	-	48,921	-	-	48,921
Seminarian support	9,200	-	-	9,200	606	-	-	606
Accounting services	-	55,700	-	55,700	-	51,719	-	51,719
Bank fees	-	2,091	-	2,091	-	1,168	-	1,168
Conferences and meetings	-	261	-	261	-	-	-	-
Depreciation	-	19,457	-	19,457	-	15,586	-	15,586
Dues and subscriptions	-	4,644	-	4,644	-	5,213	-	5,213
Insurance	-	25,711	-	25,711	-	32,669	-	32,669
Property taxes	-	11,588	-	11,588	-	-	-	-
Legal	-	146,589	-	146,589	-	102,645	-	102,645
Other Consulting	-	20,908	-	20,908	-	11,624	-	11,624
Other expenses	-	27,931	-	27,931	-	10,137	-	10,137
Outside services	-	2,815	-	2,815	-	1,774	-	1,774
Postage	-	398	-	398	-	465	-	465
Printing and publications	-	-	-	-	-	15,760	-	15,760
Returning property expenses	-	13,112	-	13,112	-	13,480	-	13,480
Supplies and materials	-	4,075	-	4,075	-	2,056	-	2,056
Telephone and internet	-	9,108	-	9,108	-	8,005	-	8,005
Vehicle expense	-	6,632	-	6,632	-	8,464	-	8,464
	1,505,177	351,020	-	1,856,197	1,566,227	280,765	-	1,846,992

(continued)

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Functional Expenses - Continued

For the Years Ended December 31, 2025 and 2024

	2025				2024			
		Supporting Services				Supporting Services		
	Program Services	Management and General	Fundraising	Total	Program Services	Management and General	Fundraising	Total
ECCO								
Guest Services	66,717	-	-	66,717	65,374	-	-	65,374
Food Service	416,073	-	-	416,073	404,401	-	-	404,401
Housekeeping	111,889	-	-	111,889	116,051	-	-	116,051
Utilities	107,594	11,955	-	119,549	97,828	10,870	-	108,698
Maintenance	162,751	-	-	162,751	162,462	-	-	162,462
Transportation and vehicles	72,007	-	-	72,007	113,865	-	-	113,865
Insurance	38,921	4,324	-	43,245	52,093	5,788	-	57,881
Programs	172,485	-	-	172,485	176,961	-	-	176,961
Operations wages and benefits	-	476,100	-	476,100	-	455,636	-	455,636
Travel and meals	-	6,791	-	6,791	-	7,188	-	7,188
Staff development	4,274	-	-	4,274	1,910	-	-	1,910
Office supplies	-	6,648	-	6,648	-	13,545	-	13,545
Telephone	-	10,256	-	10,256	-	9,538	-	9,538
Accounting and legal	-	25,550	-	25,550	-	24,280	-	24,280
Dues and subscriptions	-	8,420	-	8,420	-	7,503	-	7,503
Other	-	4,691	-	4,691	-	428	-	428
Payroll processing fees	-	3,492	-	3,492	-	4,465	-	4,465
Merchant card and bank fees	-	2,783	-	2,783	-	2,961	-	2,961
Depreciation expense	-	84,946	-	84,946	-	86,437	-	86,437
Amortization of right-of-use assets	-	52,618	-	52,618	-	-	-	-
	1,152,711	698,574	-	1,851,285	1,190,945	628,639	-	1,819,584
	$ 2,657,888	$ 1,049,594	$ -	$3,707,482	$ 2,757,172	$ 909,404	$ -	$3,666,576

See accompanying notes and independent auditor's report

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Statements of Cash Flows

For the Years Ended December 31, 2025 and 2024

	2025	2024
Cash flows from operating activities before capital additions:		
Changes in net assets	$ 1,948,833	$ 206,045
Adjustments to reconcile changes in net assets to net cash used by operating activities:		
Depreciation	104,403	102,023
Amortization of right-of-use assets	52,618	-
Investment gain	(2,570,144)	(775,015)
(Increase) decrease in accounts receivable	(54,781)	38,720
(Increase) decrease in due from net assets without donor restrictions	2,400	(3,800)
Decrease in prepaid expenses	19,668	1,244
Increase in other assets	(20,000)	-
Increase (decrease) in accounts payable	62,390	(111,971)
Increase in due to net assets with donor restrictions	(2,400)	3,800
Increase (decrease) in accrued liabilities	(10,603)	16,223
Decrease in deferred income	(2,001)	(11,327)
Increase (decrease) in funds held for others	(18,615)	18,770
Payments on operating lease liability	(54,130)	-
Total adjustments	(2,491,195)	(721,333)
Net cash used by operating activities	(542,362)	(515,288)
Cash flows from investing activities:		
Purchases of property, plant, and equipment	(35,791)	(22,522)
Proceeds from sale of property	-	2,842,548
Purchases of investments	(4,130,115)	(874,882)
Proceeds from sale of investments	1,512,507	1,735,132
Net cash provided (used) by investing activities	(2,653,399)	3,680,276
Net increase (decrease) in cash	(3,195,761)	3,164,988
Cash at beginning of year	3,985,409	820,421
Cash at end of year	$ 789,648	$ 3,985,409
Cash (general) at end of year	$ 779,137	$ 3,975,230
Cash (restricted and designated) at end of year	10,511	10,179
	$ 789,648	$ 3,985,409
Supplemental disclosures of non-cash investing and financing activities:		
Right-of-use assets acquired through operating lease liability	$ 212,252	$ -

See accompanying notes and independent auditor's report

THE EPISCOPAL DIOCESE OF SAN JOAQUIN

Notes to Financial Statements

December 31, 2025 and 2024

NOTE 1 - Organization and summary of significant accounting policies:

Nature of operations

The Episcopal Diocese of San Joaquin, ("Diocese") was formed to conduct religious activities within the Episcopal Diocese of San Joaquin and to own, maintain and operate church-related facilities of the Episcopal Church. The Episcopal Diocese of San Joaquin conducts religious activities of the Episcopal Church within the counties of Calaveras, Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, Tulare, and Tuolumne in the State of California.

The parishes of these counties pay monthly assessments to the Diocese. The parish assessments consist of the Diocesan assessment, which are based on a percentage of their gross collections. The parishes of the Diocese are accounted for separately in accordance with Diocesan policy and have not been audited. Therefore, the parishes have not been presented.

The Diocese includes the Episcopal Conference Center Oakhurst (ECCO) effective August 16, 2016. ECCO is fully owned and operated by the Diocese and as such these financial statements include ECCO's assets, liabilities, income, and expenses. ECCO serves the religious, educational and non-profit conference and retreat needs of Fresno, Madera, Mariposa and the rest of California's Central Valley by providing lodging, meals, meeting space and a variety of recreational activities.

Basis of accounting and allocation of expenses

The accompanying financial statements have been prepared using the accrual basis of accounting, in accordance with accounting principles generally accepted in the United States of America. Expenses have been summarized on a functional basis in the Statements of Activities. Accordingly, certain costs have been allocated between the programs and supporting services benefited. The Diocese reports information regarding its financial position and activities according to two classes of net assets: net assets without donor restriction and net assets with donor restriction.

Net assets without donor restriction

Unrestricted Net Assets—consist of net assets that are not subject to donor-imposed stipulations over which the Diocesan Council has discretionary control to use in carrying on the general operations of the Diocese.

Designated Net Assets represent funds which the Diocese has earmarked for specific purposes.

Net assets with donor restriction - Net assets whose use is limited by donor-imposed time and/or purpose restrictions.

Temporarily Restricted Net Assets—consist of net assets that have donor-imposed stipulations which are satisfied either by the passage of time or by specific actions of the Diocese.

Contributions received are reported as increases in net assets without donor restriction unless use of the related assets is limited by donor-imposed restrictions. Expenses are reported as decreases in net assets without donor restriction. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in net assets without donor restrictions unless their use is restricted by explicit donor stipulation or by law. Expirations of donor restrictions on the net assets (i.e., the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets. The Diocese has adopted a policy to classify donor restricted contributions as without donor restrictions to the extent that donor restrictions were met in the year the contribution was received.

As of December 31, 2025 and 2024, the Diocese had both net assets without donor restrictions and net assets with donor restrictions.

(continued)

Use of estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. The Diocese regularly assesses these estimates and, while actual results could differ, management believes that the estimates are reasonable.

Accounts receivable and allowance for credit losses

Accounts receivable, recorded at estimated net realizable value, represents parish assessments and guest services which were unpaid at the balance sheet date. Assessments are typically due the following month while guest services are typically due at the time of the service. The Diocese does not require collateral and, historically, has not incurred significant losses. The Diocese follows FASB ASU 2016-13, Financial Instruments—Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments. This ASU utilizes an expected loss method, which is referred to as the current expected credit loss (CECL) method. CECL requires an estimate of credit losses over the life of the financial asset using historical experience, current conditions, and reasonable and supportable forecasts. For the Diocese, the ASU applies to the measurement of its accounts receivable. Accounts receivable is presented using an allowance for credit losses to reduce the receivables balances to the net amount expected to be collected over the lives of the receivables as applicable. The Diocese had an allowance for credit losses of $-0- and $9,872 as of December 31, 2025 and 2024, respectively.

Investments at fair value measurements

Investments in equity securities are measured at fair value on a recurring basis. The Diocese applies the U.S. GAAP authoritative guidance for *Fair Value Measurements and Disclosures*, which defines fair value, establishes a framework for measuring fair value, and requires certain disclosures about fair value measurements. U.S. GAAP describes three levels of inputs that may be used to measure fair value:

Level 1—Quoted prices in active markets for identical assets or liabilities.

Level 2—Observable inputs other than Level 1 prices, such as quoted prices for similar assets or liabilities, quoted prices in inactive markets, or other inputs that are observable or can be corroborated by observable market data for substantially the full term of the assets or liabilities.

Level 3—Unobservable inputs that are supported by little or no market activity, are significant to the fair value of the assets or liabilities, and reflect management's assumptions and best estimates based on available data.

Valuation techniques used in fair value measurements need to maximize the use of observable inputs and minimize the use of unobservable inputs. A valuation method may produce a fair value measurement that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Diocese believes its valuation methods are appropriate and consistent with those used by other market participants, the use of different methodologies or assumptions could result in different fair value measurements at the reporting date. There have been no changes in the methodologies used during the years ended December 31, 2025 and 2024.

The Diocese's investments in equity securities with readily determinable fair values are measured at fair value as determined by quoted market prices (Level 1).

Investments acquired by gift are recorded at their fair value at the date of the gift.

Investments are made according to the investment policies recommended by the Diocesan Finance Council. These guidelines provide for a balanced diversified portfolio with investments in equities, fixed income and other securities with performance measured against appropriate indices. Outside parties are contracted by the Diocese for the purpose of providing investment management.

(continued)

Purchases and sales of securities are recorded on a trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded on the ex-dividend date. Investment earnings are classified in the net asset class in which the actual investment belongs.

The approximate market values of investments at December 31, 2025 and 2024, are:

	2025	2024
Equities	$ 15,824,475	$ 12,187,316
Core Fixed Income	2,504,593	599,665
Episcopal Church Foundation Growth Fund	251,959	217,933
Episcopal Church Foundation Income Fund	166,150	144,238
Other	4,439,961	4,850,234
	$ 23,187,138	$ 17,999,386

Property and equipment

In 2015 through 2023, after the courts ruled that the various properties be returned to the Episcopal Diocese of San Joaquin, related property was adjusted to as is market value or insurance value due to lack of historical cost records. All other expenditures for property and equipment additions and major renewals and betterments are included in the asset accounts at cost. Additions exceeding $2,500 are capitalized. Donated assets are included in asset accounts at fair value at the time of the donation. Maintenance, repairs and minor renewals are charged to expense when incurred.

Assets retired or otherwise disposed of are eliminated from the asset accounts, and the related amounts of accumulated depreciation are eliminated from the accumulated depreciation accounts. Gains and losses from disposals are included in the determination of changes in net assets.

Depreciation is computed using the straight-line method over the estimated useful lives of the assets.

Property and equipment are reviewed each year for impairment or whenever events or changes in business circumstances indicate the carrying value of the assets may not be recoverable. Impairment losses are recognized if expected future cash flows from the assets are less than their carrying values. No impairment losses were recognized during the years ended December 31, 2025 and 2024.

Revenue recognition

The Diocese recognizes revenue in accordance with FASB ASC Topic 606 as follows:

Grants and contributions

The Diocese accounts for contributions in accordance with the recommendations of the Financial Accounting Standards Board in regards to accounting for contributions received and contributions made. In accordance with the guidance, contributions received are recorded as net assets with donor restrictions or net assets without donor restrictions, depending on the existence or nature of any donor restrictions.

All donor-restricted support is reported as an increase in net assets with donor restrictions. When a restriction expires (i.e. when a stipulated time restriction ends or a purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restriction and reported in the statement of activities as net assets released from restrictions. Contributions are considered to be available for unrestricted use and recorded as such, unless specifically restricted by the donor.

Services fees

Service fees consist of revenue from contracts with customers relating to ECCO's conference center services. These contracts contain a single performance obligation when the service is performed and ECCO recognizes revenue at the time of service. Payments received in advance are reported as a liability.

Revenues do not include significant amounts of variable consideration or require significant judgements. The Diocese uses a practical expedient to recognize incremental costs incurred to obtain contracts. The amortization period of such expenses would be less than one year and is reported as a selling expense when incurred in the financial statements. Accordingly, any such expenses are expensed as incurred instead of capitalized and amortized.

(continued)

The Diocese believes that the captions contained on the statements of activities and changes in net assets reflect the disaggregation of its revenue by major type for the years ended December 31, 2025 and 2024.

Timing of revenue recognition

Revenue streams applicable to The Diocese that qualify as exchange transactions (primarily fee for services) are recognized at a single point in time when the services are completed.

Contract assets and liabilities

When the timing of The Diocese's revenue recognition is different from the timing of payments made by their customers, The Diocese recognizes either a contract asset (performance precedes contractual due date) or a contract liability (customer payment precedes performance). Contract assets primarily relate to The Diocese's right to consideration for services not yet billed at the reporting date associated with ECCO services. These contract assets are reclassified to receivables when the right to consideration becomes unconditional. No significant contract assets existed at December 31, 2025 and 2024. Contract liabilities primarily relate to upfront payments received from customers for service for which performance obligations are not satisfied, with revenue recognized upon completion of the transaction. These liabilities are reflected on the balance sheet as deferred revenue. The Diocese has recognized prior year customer deposits of $68,391 and $79,718 in revenue during the years ended December 31, 2025 and 2024, respectively.

Compensated absences

Employees of the Diocese and ECCO are eligible for paid vacation and sick days. It is impracticable to estimate the amount of compensation for future absences, and accordingly, no liability has been recorded in the accompanying financial statements. Diocese and ECCO's policy is to recognize the costs of compensated absences when actually paid to employees.

Credit risk

The Financial Accounting Standards Board requires disclosure in the financial statements relating to concentrations of credit risk and financial instruments with off-balance-sheet risk. Financial instruments that potentially subject the Diocese to concentrations of credit risk consist principally of temporary cash investments, investments in marketable securities and receivables.

The Diocese is subject to concentrations of credit risk with respect to temporary cash investments held at financial institutions in amounts in excess of federally insured deposit limits. At December 31, 2025 and 2024, the Diocese held cash in excess of the federally insured deposit limitations with one and three financial institutions, in the amount of approximately $200,000 and $3,225,000, respectively.

The Diocese is also subject to concentrations of credit risk with respect to investment securities. These investments and any cash are not federally insured, and, due to the fact that investment return and principal value will fluctuate, upon redemption, shares owned may be worth more or less than their original cost.

The Diocese's concentration of credit risk with respect to accounts receivable, which are recorded at net realizable value, are limited due to the large number of accounts. Receivables consist primarily of parish assessments and reimbursements of expenses paid. In determining the amount of the allowance for credit loss, the Diocese develops a loss rate for each pool. The loss rate is based on management's historical collection experience, adjusted for management's expectations about current and future conditions. Accounts receivable balances are charged off against the allowance for credit losses after recovery efforts cease.

Tax exempt status

The Diocese is a part of The Protestant Episcopal Church in the United States of America which is an unincorporated association and has an explicit federal "group" tax exemption under the Internal Revenue Code. The Church's status is currently reflected in its listing in the IRS Cumulative List of Tax Exempt Organizations.

Functional allocation of expenses

The costs of providing the various programs and other activities have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited. The expenses that are allocated include salaries, benefits, and payroll taxes, which are allocated on the basis of estimates of time and effort. Management and general expenses include those expenses that are not directly identifiable with any other specific function but provide for the overall support and direction of the organization.

(continued)

Reclassifications

Certain reclassifications have been made to the prior year financial statements in order for them to conform with the current year presentation.

Subsequent events

Management has evaluated subsequent events through October 14, 2026, the date on which the financial statements were available to be issued.

NOTE 2 - Notes receivable:

Notes receivable related party at December 31, 2025 and 2024, is as follows:

	2025	2024
4.85% note receivable (interest rate adjusted every 5 years), due in monthly principal and interest payments of $6,783 with all unpaid principal and interest due September 5, 2041. (This note was obtained by St. Johns Parish, Lodi. A corresponding note payable is reflected in notes payable included in Note 4).	$ 908,918	$ 945,428
4.85% note receivable (interest rate adjusted every 5 years), due in monthly principal and interest payments of $3,415 with all unpaid principal and interest due September 5, 2041. (This note was obtained by St. Johns Parish, Lodi. A corresponding note payable is reflected in notes payable included in Note 4).	425,094	445,129
	1,334,012	1,390,557
Less - current portion	62,873	60,260
	$ 1,271,139	$ 1,330,297

NOTE 3 - Property and equipment:

A summary of property and equipment follows:

	2025	2024
Land and land improvements	$ 2,947,564	$ 2,947,564
Buildings and improvements	52,418,455	52,410,149
Furniture and equipment	715,515	688,028
Computers	2,752	2,752
Autos	375,366	375,366
	56,459,652	56,423,859
Less - accumulated depreciation	52,697,673	52,593,270
	$ 3,761,979	$ 3,830,589

Depreciation expense was $104,403 and $102,023 for the years ended December 31, 2025 and 2024, respectively.

As of December 31, 2025 and 2024, the Diocese held one property, included above, which is considered held for sale. Property held for sale but included above follows:

	2025	2024
Land	$ 118,536	$ 118,536

NOTE 4 - Notes payable:

A summary of the notes payable at December 31, 2025 and 2024, follows:

	2025	2024
4.85% note payable (interest rate adjusted every 5 years), to Bank of Stockton due in monthly principal and interest payments of $6,783 with all unpaid principal and interest due September 5, 2041. (This note was obtained by St. John's Parish, Lodi. A corresponding note receivable is reflected in notes receivable included in Note 2).	$ 908,918	$ 945,428
4.85% note payable (interest rate adjusted every 5 years), to Bank of Stockton due in monthly principal and interest payments of $3,415 with all unpaid principal and interest due September 5, 2041. (This note was obtained by St. John's Parish, Lodi. A corresponding note receivable is reflected in notes receivable included in Note 2).	425,094	445,129
	1,334,012	1,390,557
Less - current portion	62,873	60,260
	$ 1,271,139	$ 1,330,297

Based on the assumption that remaining long-term debt will be paid according to the original loan stipulations, the estimated aggregate principal payments for the next five years and thereafter are as follows:

2026	$ 62,873
2027	62,091
2028	65,170
2029	68,402
2030	71,794
Thereafter	1,003,682
	$ 1,334,012

NOTE 5 - Net assets with donor restrictions:

A summary of net assets with donor restrictions at December 31, 2025 and 2024, follows:

	2025	2024
St Matthews	$ 419,815	$ 363,547
Mary Zita	170,071	143,957
Clipper Trust	329,004	278,486
St. Paul's Episcopal Church	68,267	72,322
Emergency Relief	8,804	8,804
Togni Charitable R. Unitrust	68,277	57,793
St. Clare's Avery, Feathers Trust	442,415	392,203
	$ 1,506,653	$ 1,317,112

ECCO's net assets with donor restrictions relate to donations received for sites at the Campo Santo Columbarium.

NOTE 6 - Commitments:

ECCO entered into an operating lease for a copy machine which expires October 2029. ECCO also entered into an operating lease for a bus in May 2025 which expires June 2028. For the year ended December 31, 2025, a right-of-use asset and related liability has been reflected on the balance sheet in accordance with FASB ASU 2016-02, Leases (Topic 842).

For leases that the discount rate is not explicitly stated, the Diocese utilizes an incremental borrowing rate. In accordance with FASB ASU 2016-02, Leases (Topic 842), for reporting leases, the Diocese's summary of lease related assets and liabilities consisted of the following as of December 31, 2025 and 2024:

	2025	2024
Operating lease ROU asset	$ 159,632	$ -
Operating lease liability, current portion	64,546	-
Operating lease liability, net of current portion	93,576	-
	$ 158,122	$ -

Amortization expense on these right of use assets for the year ended December 31, 2025 was $52,618.

The Diocese's weighted average remaining lease term and discount rate are as follows:

Weighted average remaining lease term (in years)	3
Weighted average discount rate	3.98%

Future minimum lease payments expected to be paid under noncancellable lease agreements is expected to be as follows:

Year ending December 31,	
2026	$ 69,672
2027	69,672
2028	24,796
2029	1,965
	166,105
Less: Interest	(7,983)
Present Value of lease liabilities	$ 158,122

NOTE 7 - Contingencies:

Litigation

The Madera Irrigation District filed a petition with the State Water Resources Board for a determination of all water rights of parties in the Fresno River Watershed. The Episcopal Conference Center Oakhurst is located in the watershed and covered by this petition. No determination that an unfavorable outcome is either probable or remote can be made at this time. At this time, the Diocese believes that the adjudication will not result in an impact to ECCO's future use of water for its core operations and believes that the outcome of such matter will not have a material impact on the Diocese's financial position or results of future operations.

Significant risk

The Diocese's information technology system is an integral part of The Diocese's operations, including banking and credit card transactions, customer information security, and its accounting and financial reporting system. Substantial financial, regulatory, and business reputation risk exists in the event of a cyber-attack on the Company's information technology. The actual effect of a successful attack, if any, cannot be determined.

NOTE 8 - Lay Retirement Plan:

The Episcopal Diocese of San Joaquin participates in The Episcopal Church Lay Employees' Retirement Plan, a defined benefit plan covering substantially all full-time lay employees. As the Plan is considered a multi-employer plan, the actuarial present value of accumulated plan benefits and plan assets are not available by operating unit. For the years ended December 31, 2025 and 2024, The Episcopal Diocese of San Joaquin contributed $56,346 and $56,624 to The Episcopal Church Lay Employees' Retirement Plan, respectively.

NOTE 9 - Liquidity and availability of financial assets:

The Diocese has the following financial assets that could readily be made available within one year of the balance sheet to fund expenses without limitations:

	2025	2024
Cash	$ 789,648	$ 3,985,409
Accounts receivable, net of	379,446	324,665
Prepaid expenses	2,500	22,168
Investments, at fair value	23,187,138	17,999,386
Total financial assets at year-end	24,358,732	22,331,628
Less those unavailable for general expenditure within one year, due to:		
Investments and other financial assets held for others or with donor restrictions	(1,506,653)	(1,317,112)
Financial assets available to meet cash needs for expenditures within one year	$ 22,852,079	$ 21,014,516

In addition to financial assets available to meet general expenditures over the year, The Diocese operates with a balanced budget and anticipates covering its general expenditures by collecting sufficient assessments and other revenues, as needed. The statement of cash flows identifies the sources and uses of the Diocese's cash and shows cash used by operations for the years ended December 31, 2025 and 2024.

NOTE 10 – Prior period adjustment:

The total assets as of December 31, 2023, had been restated to reflect the St. Columba property awarded back to the Diocese in 2019 in the amount of $2,817,548. This property awarded back to the Diocese had been recorded in the December 31, 2023 financial statements. Property and equipment and beginning fund balance, on the December 31, 2023 statement of financial position, had been increased by $2,817,548.

Net assets with donor restrictions as of December 31, 2023 had been restated to reflect an error in reporting restricted donations received in 2021 for solar projects in the amount of $25,000. Such restricted donation was originally recorded as a donation without donor restrictions. As such, the December 31, 2023 beginning net assets with donor restrictions had been increased by $25,000 while net assets without donor restrictions had been decreased by $25,000.

JOINT REPORT OF THE COMMITTEE ON RESOLUTIONS & COMMITTEE ON CONSTITUTION AND CANONS

Date: October 27, 2026

To: Rt. Rev. Greg Kimura, President and Presiding Officer of Convention cc: Secretary of Convention

From: Michael O. Glass, Chair of the Committee on Resolutions and Committee on Constitution and Canons

Re: Resolutions for 2026

Dear Bishop Kimura,

As the Chair of the Committee on Resolutions and the Committee on Constitution and Canons I submit this Joint Report to you on behalf of the Convention of the Diocese of San Joaquin pursuant to Canon V.5.01(3) and Canon VI.35.01 of the Diocesan Canons.
The Committees as duly appointed included the following members in addition to me: Secretary Cindy J. Smith. There were no resolutions submitted to the Committees for review and vote at this 67th annual meeting of Diocesan Convention.

Respectfully Submitted:

/signed/ Michael O. Glass

Chair of the Committee on Resolutions and
Committee on Constitution and Canons
cc: Committee Members (via email)

Reports to Diocesan Convention

Standing Committee

Per Canon, the defined duties of the Standing Committee include acting as the Council of Advice to the Bishop; serving as the Ecclesiastical Authority in the absence of a Bishop; determining if their consent will be given for ordinations and Episcopal elections throughout the Church; and various Canonical duties regarding property and disciplinary matters.

In the 2025-26 year, the Standing Committee performed those defined duties as needed yet also continued to fill a unique - and only occasionally seen – role. The role of overseeing a bishop transition within the diocese, in this case from Bishop David C. Rice to Bishop-Elect Greg Kimura. With the election of a new bishop, the Rev. Dr Greg Kimura on the second ballot at the Special Meeting of Convention already completed in October, the EDSJ Standing Committee then waited several weeks for the necessary consents to be received from Bishops with jurisdiction and other Standing Committees throughout The Episcopal Church. Once received, the Standing Committee worked with the Diocesan Council to formalize the Bishop-Elect's compensation package.

Months-long preparation with the Office of Presiding Bishop Sean Rowe lead up to the ordination and consecration of the Sixth Bishop of San Joaquin on April 18, 2026, followed by a garden party reception on the grounds of the cathedral. The varied aspects of the preparation included organizing small group gatherings and numerous receptions over several days; design of the worship space and liturgy lead by SC member and Master of Ceremonies, The Rev. Betsy McElroy (who also served as Chaplain throughout the multi-year process); continuing communication to the wider church through the Bishop Search (and ultimately, Transition) pages of the diocesan website and press releases; acquiring the various liturgical gifts of office and the setup of donation options; sending special invitations to guests; AV design and technical facilitation both within the cathedral and streamed throughout The Episcopal Church; organization of a "Welcome Team" led by SC member Marshall Johnston who worked to assure that not only those from EDSJ, but also our many honored guests and community partners, had a reserved seat at the consecration and were met by a friendly face and heartfelt welcome as they shared in this special day.

The Bishop Transition responsibilities of the Standing Committee also included organization of a joyful Diocesan Celebration of the ministry and leadership of our Fifth Bishop of San Joaquin, David C. Rice on Feb 28th as he, and wife Tracy, made their farewells to this diocese.
The Standing Committee wishes to express our sincere thanks to all involved. These events were successful due to the talents and efforts of many people and groups from the Cathedral (administrator Roxann McSpadden, the Chapter, the hospitality team, Altar Guild, musicians, technicians and others), volunteers from throughout the diocese, staff from the Office of the Presiding Bishop and the continued spirit-filled assistance and wisdom of our consultant Canon Brian Nordwick. The Standing Committee was also thrilled to complete all required aspects of their Search and Transition responsibilities well under budget.

As we moved into summer, the role of the Standing Committee returned to more typical tasks as we focused on being the Council of Advice and support to Bishop Greg as he became familiar with his new diocesan home and together, as a team, we looked to the future of our diocese. We continued to meet at least monthly with Bishop Greg, Canon Anna (until her move to the Diocese of Massachusetts) and Chancellor Michael Glass. We also meet jointly with Diocesan Council every other month.

For the record, the members of the 2025-2026 Standing Committee were:
The Rev. Rebecca Blair
Ms. Melissa Crider
The Rev. Brian Dawson
Mr. Marshall Johnston, PhD (Secretary)
Ms. Linda Masztal
The Rev. Betsy McElroy
Ms. Cindy J. Smith (President)
The Rev. Deacon Carolyn Woodall

Note: during the summer of 2026, our valued colleague and friend, The Rev. Deacon Carolyn Woodall resigned and moved to Spain. The Bishop and SC agreed that as her term was ending shortly, her seat would be left vacant for several months until the November 2026 Diocesan Convention election.

Respectfully submitted,

Cindy J. Smith
President of Standing Committee

Diocesan Council

The Diocesan Council performed its duties and responsibilities according to the Canons and Constitution of the Episcopal Diocese of San Joaquin during the term following the 66th Annual Meeting of the Convention by:

Meeting monthly, via ZOOM web/teleconference or in person, in accordance with requirements and procedures specified by Canon 9.05.

Receiving monthly reports from The Right Rev Bishop David Rice (December 2025 – March 2026) and The Right Rev Bishop Gregory Kimura (April 2026 – October 2026) regarding their leadership and ministry in the Diocese and the wider Church.

Receiving monthly reports from The Rev Canon Anna Carmichael (December 2025 – July 2026) regarding the status and activities with Diocesan transitions in progress, the work of Diocesan Commissions, and other ministries and projects.

Receiving monthly reports from Chancellor Michael Glass regarding the status of Diocesan property sales and support, litigation, congregation support, and governance updates.

Receiving monthly reports from ECCO Directors, Joanne Kovac-Roberts & Michael Roberts regarding the status of ECCO's finances, buildings, grounds, and equipment as well as scheduled events and activities.

Reviewing and approving financial reporting submitted monthly by Treasurer Deacon Greg Masztal (December 2025 – May 2026), Alisa Sparks, CPA and Treasurer Joe Kieta (June 2026 – October 2026) regarding Diocesan operating income and expense in relation to budget requirements and the status of Diocesan investments managed by DFMS (Domestic & Foreign Missionary Society).

Reviewing the status of assessment payments pursuant to Diocesan Canon 21.10

Electing Jan Dunlap as Vice President and Dr. Skylar Carlson as Secretary of Diocesan Council. Approving the submitted Housing Allowance resolution for diocesan-paid clergy (Bishop, Canon, and Latino Missioner) to designate part of their salary to be tax-free for housing in lieu of being provided a rectory.

With the advice of Chancellor Michael Glass, appointing a joint subcommittee of the Standing Committee and Diocesan Council, to negotiate the terms and form of the Letter of Agreement (LOA) with the Bishop Elect Gregory Kimura.

Concurring with the Standing Committee's proposal for the terms and conditions to be incorporated into a written letter of agreement with the Bishop-Elect, the Rev. Greg Kimura ("LOA"); authorizing the officers of the Diocesan Council with the officers of the Standing Committee, to execute the LOA on behalf of the Diocese; amending and revising the 2026 Diocesan Budget to provide for the Bishop's compensation.

Approving the transfer of $88,500 in funds from the Episcopal Conference Center Oakhurst (ECCO)" DFMS investment account to ECCO's operating account for the purpose of purchasing and installing a generator and related equipment for the ECCO campus.

Authorizing the Treasurer to fund the annual budgeted draw of $644,244 from the Diocesan investment account by making quarterly transfers from the investment account to the operating accounts of the Diocese in the amounts of $161,061.

Approving the 2026 Engagement Letter of Alisa Sparks, CPA increasing fees effective starting with services for the month of January.

Approving the continuance of Demera Demera Cameron as our outside auditors for the 2025 Audit.

Approving resetting the Bishop Sabbatical Accumulation of $6,000.00 to $0.00 and start the accumulation again in the 2027 Budget.

Approving the release of $25,646.45 in unused funds from Buildings & Grounds Grants to operating funds.

Approving the extension of Bishop David's Insurance Coverage through April 2026.

Approving reimbursement to Padre Nelson for an extended car warranty.

Approving the transfer of ownership of the mobile phone device and tablet used by Bishop David while in the employ of the Diocese to Bishop David, with any data, documents, and other proprietary data belonging to the Diocese stored on the devices remaining the property of the Diocese, transferring or transmitting that data to the Diocese upon request.

Approving Bishop-Elect Greg Kimura's housing allowance.

Authorizing the Treasurer to fund the amended annual budgeted draw from the investment accounts of the Diocese of $657,395 by making the remaining quarterly transfers from the investment account to the operating accounts of the Diocese in the amounts of $174,212.

Approving the extension of the clergy support grant for St. John's, Lodi by $30,000 to be funded by transferring those funds from the St. Francis, Turlock clergy support grant through the end of the year.

Approving a $20,000 diocesan down payment toward settlement of an outstanding contractor obligation with St. James Cathedral responsible for the remaining balance.

Approving that $3560 of the St John's Stockton clergy support grant be reallocated to the expedited processing of the R1 Visa Renewals for The Rev. Karen Matthews and The Rev. Brian Dawson.

Approving the designation of two unused leadership Diocesan Budget line items totaling $3000 for Rev. Betsy McElroy's Leadership Fellowship Program tuition.

Updating the accounting services contract with Alisa Sparks' firm to include increased financial oversight and bookkeeping responsibilities previously performed by the former diocesan treasurer.

Approving the appointment of Joe Kieta as Diocesan Treasurer.

Authorizing the Treasurer to fund the severance package for The Rev. Cn. Anna Carmichael, Ph.D. (Canon to the Ordinary) from the investment accounts of the Diocese to the operating accounts of the Diocese.

Authorizing for purchase of a vehicle for Bishop Greg Kimura.

Authorizing the Bishop & Chancellor to negotiate and execute loan modifications with the goal of reducing interest rates on St. John, Lodi bank loan.

Jointly approving with the Standing Committee, grant of easement to PG&E at St. Clare of Assisi, Avery.

Jointly approving with the Standing Committee, the listing for sale of the St. Andrew, Taft property.

Forming a finance committee to assist with and make recommendations for designated financial decisions and responsibilities of the Diocese including the creation of a proposed 2027 Diocesan Budget.

Submitting the proposed 2027 Diocesan Budget for consideration and approval by the 67th Annual Convention in accordance with the requirements of Canon 9.06.

The Diocesan Council recognizes the service of outgoing members, the Rev. Dcn. Tom Hampson, and Dr. Skylar Carlson for serving for three terms as Secretary.

The Diocesan Council also recognizes the service of resigning members, Mr. Niniv Tamimi, (lay at large member, one year of term remaining), and Mr. Joey Soria, (lay at large member, two years of term remaining). Per Diocesan Canon IX Sec 9.03, the Diocesan Council shall elect qualified persons to fill any vacancies and shall serve the remaining unexpired term of that office.

Additionally, the Diocesan Council recognizes and thanks former Treasurer Deacon Greg Masztal for his financial reporting, guidance and assistance with the transition to a new treasurer, Treasurer Joe Kieta for his gift for distilling, presenting and implementing recommendations for the financial health of the Diocese, Alisa Sparks for her and her firm's financial reporting, Chancellor Mike Glass for his guidance and expertise, Canon Anna Carmichael for preparing and distributing supporting documentation and meeting logistics along with her support and expertise, Administrator Roxann McSpadden for distributing supporting documentation and meeting logistics, and former Bishop David Rice and Bishop Greg Kimura for their leadership and direction.

Respectfully submitted,

Ms. Jan Dunlap, Vice President
Dr. Skylar Carlson
The Rev. Dcn. Tom Hampson
Mr. Claude Muncey
The Rev. Dcn. Nancy Key
Mr. Jeff March
The Rev. Jorge Pallares
Mr. Niniv Tamimi
Mr. Joey Soria

Commission on Ministry

Mission and Vision

The Commission on Ministry has, since the time Rev. Luis Rodriguez was chair, intentionally moved to make sure that our mission is more than seeking out ordained ministers: we are keen to identify and train lay ministers, and continue to do so. We want to emphasize to the Convention that our goal is to help all people seeking to do ministry, whether that be through the Baptismal Covenant that we have all sworn that leads us to ministry, or through Holy Orders. The hope of COM is that all those who engage with us - at Days of Discernment, Lay Ministry Retreats, or other events - will let us be your partner in finding a way to serve God. Our vision is to be a group that helps all EDSJ worshippers to also be discerners, always looking for new ways to live their faith.

This Year

The 2025-2026 year was a lively one for COM. We hosted two Diocesan Days of Discernment this year after learning that one per year was not sufficient for the whole diocese, and we were overjoyed to have good attendance at both days - not only because it is encouraging to see but because our conversations with the attendees were valuable, affirming, and life-giving. We will continue to do two events per year for the foreseeable future.

One event that is becoming larger by the year is our Lay Ministry Retreat, which is organized to gather laypeople so they can learn more about the ministry of the laity and identify what licensed ministries they may wish to pursue. We would like to invite anyone interested to join us this year.

We would like to especially thank Deacon Carolyn Wooddall for her years of service on COM as she moves on to her new adventure. Deacon Carolyn was integral to our efforts and a beloved member of our group, and we hope to continue our good work while recalling the gifts she shared with us.

The Future

COM is currently shepherding two postulants and three aspirants to Holy Orders. This process is never simple, nor is it quick, but we are overjoyed to be able to join with those who are seeking ordination. We have several people who attended Days of Discernment who are still considering their path forward, and we wait with joy to serve them as well.

Please keep us, and all those who seek to serve God, in your prayers.

In the love of Christ,

Rev. Luke Martinez and Dr. Nancy Silva
Co-Chairs, Commission on Ministry

Commission on Ministry Membership

2027 | Lauralee Brown, St James, Sonora
2027 | Nancy Silva, St Paul's Modesto, co-chair
2027 | Michael Cava, St Paul's Bakersfield
2027 | The Rev. Bob Woods, St Sherrian's, Kernville

2028 | The Rev. Dcn. Greg Masztal, St. Paul's Modesto
2028 | The Rev. Dcn. Cathy Kline, St Michael's Ridgecrest & St Paul's Bakersfield
2028 | Anna Pendergrass, St Paul's Visalia
2028 | Melissa Crider, Episcopal Church of the Saviour, Hanford

2029 | The Rev. Luke Martinez, Episcopal Church of the Saviour, Hanford, co-chair
2029 | Paul Siebuhr, St John's Tulare
2029 | TBA
2029 | TBA

Episcopal Conference Center Oakhurst

2026 brought many opportunities for the clergy and lay community of EDSJ to gather, learn, and grow together at ECCO. We began the year by hosting the Diocesan Council/Standing Committee Joint Retreat and the Commission on Ministry Retreat. February and March continued with the Winter Clergy & Spouse Conference, Building Church Leaders, the Winter Family Retreat, and the Deacons' Retreat.

May was a busy month for ECCO. Volunteers gathered for the Weekend of Service, where they stained the benches in the outdoor chapel, cleaned up the flower beds, and islands. ECCO also hosted its Spring Opera Weekend and the Lay Worship Ministry Training.

In July, ECCO held its Summer Family Camp. Campers enjoyed field trips to Bass Lake, participated in a Stream Ecology activity, and hiked on the newly cut ECCO trails. Participants also enjoyed fishing, tie-dying, group games, archery, s'mores, songs, and the 75-foot slip-n-slide. The Rev. Betsey McElroy and Melissa Crider led Christian Formation and worship. ECCO also hosted the Episcopal Coalition of Immigration Justice Folk School Gathering – an opportunity for each California diocese to send delegates and share, learn, and engage in fellowship as they navigate the challenges of ICE presence in their communities and how they can faithfully respond.

The Joint Commission Retreat came to ECCO in September, followed by EDSJ's Fifth Annual Women's Retreat in October. Participants spent time learning and reflecting on our Sacred Gift of Time. Participants also made pocket altars and prayer beads, walked the labyrinth, and enjoyed a facilitated watercolor painting session.

The year will conclude with ECCO hosting the 67th Annual Diocesan Convention in November, followed by the Fall Clergy Retreat. Throughout 2026, ECCO has remained a place where the EDSJ community can come together for fellowship, formation, service, reflection, and renewal.

2027 looks to be another fantastic year, and we hope you will plan to visit soon and experience the beauty of ECCO. We believe it is a place for people of all ages to grow, play, and participate in Christian formation in a safe and nurturing community. We invite you to come and experience the ministry of ECCO and let it become your home away from home.

Respectfully Submitted by:
Joanne Kovac-Roberts & Mike Roberts

Program & Hospitality statistics

ECCO currently has 34 full-time, part-time, and seasonal employees ready and waiting to serve the needs of the Diocese and your faith community.

By the end of 2026, ECCO will have served over 9,694 Total Guest Days (1 night + 3 meals = 1 Guest Day) and 142 groups.

Projects & Programs completed & to be completed in 2026

- Winter Family Retreat
- Summer Family Camp
- Spring Weekend of Service, May 1 through 3, 2026
- Installation of a new generator
- Repair of the Frog Pond Dam
- Removal of downed trees and brush along the Stations of the Cross trail & Campo Santo
- Strip and re-stain lodge room furniture

2027 Projects & Programs

- Winter Family Retreat, February 13 & 14
- Spring Weekend of Service, April 30 – May 2
- Summer Family Camp, June 17 – 20
- Continue building new hiking trails
- Repair walkway between Lyles Hall and Sanford Lodge
- Repair sections of road along Cain Drive and within the ECCO property
- Add additional lighting to walkways and outside of buildings
- Investigate how to repair or replace the stairway up to the Dorms and Beardsley Lodge

Audit Review Committee Report
Congregational Management Review 2026

This year parishes were to complete their Congregational Management Reviews (CMRs) reflective of the 2025 fiscal year. The CMRs include both a financial review, as well as a review of Vestry/BC/Chapter minutes, operational protocols, and disaster preparedness plans. Completion of the CMR is a requirement of the Canons of The Episcopal Church, which mandates that every congregation is to have an annual financial audit.

As approved by Diocesan Council in 2022, congregations continue to use the CMR format in a 3-year rotation.

Year 1 - Internal CMR done by members of the congregation, but not the Treasurer or Clergy person responsible for the congregation
Year 2 - Peer CMR done by a neighboring congregation
Year 3 - Independent CMR done by a member of the Audit Committee

The Diocesan Council continued with the policy allowing for members of the Audit Committee who conduct independent CMRs to be compensated in the amount of $500, which is much less than having a Certified Public Accountant perform the audit.

Congregations that did an internal review and submitted their completed report to the diocese for 2025 were:
St Paul's, Bakersfield
Church of the Saviour Hanford
St James Cathedral Fresno
St Matthews San Andreas
The above named congregations will need to do a peer review in 2027.

Congregations that did a peer review and submitted their completed report to the diocese for 2025 were:
St Paul's Visalia
St Raphael's Oakhurst
Holy Trinity Madera
St Francis Turlock
St Paul's Modesto
The above named congregations will need to do an independent review in 2027

Congregations that did an independent review and had their reports submitted to the diocese for 2025 were:
St Sherrian's Kernville
St Michael's Ridgecrest
St John's Stockton
St Anne's Stockton
St John's Lodi
St John's Tulare
The above named congregations will need to complete an internal review for 2027.

Latino Missioner Reports

Over the past year, my work has focused on supporting our Latino congregations, helping parishes welcome Spanish-speaking families, and contributing to the Diocese's wider life. Much of this ministry takes place in Fresno, Visalia, and Tulare, where we have seen encouraging growth while accompanying families through considerable uncertainty.

Following our last Convention, I helped organize and celebrate Las Posadas in Bakersfield, Fresno, and Tulare. Remembering Mary and Joseph’s search for shelter holds particular meaning for communities facing the challenges of migration and increased immigration enforcement. We are preparing to celebrate again in all three cities, and I have begun conversations with Northern Deanery clergy about bringing Las Posadas to a congregation there next year.

At St. James Cathedral, I continue to serve the Spanish-speaking community and provide supply ministry for the English-speaking congregation once or twice a month. Since Nancy’s retirement, I have also been assisting the liturgy planning team.

Sunday attendance ranges from 100 to 130 people, with more children and families becoming involved. Approximately 50 children and 25 parents are participating in First Communion and Confirmation preparation. The group size required us to move classes to Tuesdays in the Fireside Room. This interest is encouraging, and it reminds us how much these families need space, resources, and ongoing pastoral care.

I continue to assist the Cathedral’s food distribution ministry through publicity, community outreach, and connections with organizations that offer other services. Greater need, along with increased social media visibility, has led us to double the amount of food distributed and the number of families served. These encounters also give us opportunities to get to know families and help them find additional support.

Immigration enforcement has weighed heavily on the congregation. Raids in mid-October caused enough fear that we suspended First Communion and Confirmation classes for three weeks. Relatives of three parishioners were detained in the Fresno area, and some families are considering returning to Mexico. One family has signed voluntary self-deportation paperwork and is seeking help with the arrangements. We continue to pray with these families, listen to their concerns, and connect them with resources as they make difficult decisions.

Following the Rev. Susy Ward’s retirement, the Rev. Luke Martinez and I began sharing pastoral and administrative responsibilities at St. Paul’s. I am grateful for Susie’s faithful service and the care she gave this congregation. I now celebrate Sunday Eucharist there two or three times each month.

Father Luke, the Bishop’s Committee, and I have been working to strengthen the parish’s financial administration so that it can eventually support a part-time priest, or someone able to offer a greater time commitment.

We have also begun exploring Latino ministry in Visalia. The Bishop’s Committee approved a bilingual parish logo, and changes to the worship space have made it easier for children to stay with their parents during services. We now offer a weekly bilingual Eucharist on Thursdays at 12:30 p.m. We also held an event partnering with SJRAISE and the UFW Foundation to support those in the city looking to regularize their immigration status.

For Christmas Eve, we are planning a joint bilingual celebration at St. Paul's with English- and Spanish-speaking members of St. John's in Tulare. We hope this shared celebration will deepen the relationship between the congregations and help more Latino families find a church home in Visalia.

The Hispanic ministry at St. John's began in September 2025. By the end of that year, approximately three families, or 12 people, attended the Spanish-language Eucharist regularly. Sunday attendance now ranges from 25 to 54. Our largest gatherings have included Healing Masses and Bishop Greg Kimura's Pentecost visit, when we celebrated Confirmations, First Communions, and canonical receptions.

A second cycle of First Communion and Confirmation classes has begun, with 22 children registered. Some come from primarily English-speaking families and have started attending Sunday Eucharist at St. Paul's in Visalia. It has been a joy to see the work in Tulare also bring new families into the life of our neighboring parish.

Father Luke and I have worked with parishioners to improve the church and parish hall and encourage everyone to share in caring for the property. The Hispanic congregation purchased a portable air-conditioning unit for the hall, and one member covered the insurance deductible for repairs after the church's air-conditioning unit was vandalized. These generous contributions show how deeply members are coming to regard St. John's as their church home.

With the help of Deacon Terry March and Emily Burnias, we also began distributing groceries after Eucharist on the second and fourth Sundays of each month. This ministry serves parishioners and visitors and has become a regular part of our care for the community.

As in Fresno, fear surrounding immigration enforcement has affected attendance and led us to suspend sacramental preparation classes for three weeks. Even with these difficulties, families continue to worship, bring their children for formation, and contribute to parish life. Their commitment gives us much reason for hope. We appreciate Paul Siebuhr's support during this time, standing by the door to ensure that families were safe while arriving at church to worship.

Alongside my parish work, I have helped plan the Diocesan Commissions Retreat, prepare the liturgy for this 67th Annual Convention, and organize the Fall Clergy Conference scheduled for later this year.

The Rev. Betsy McElroy and I also worked closely to ensure that the Latino community could participate in Bishop Greg Kimura's consecration. It was important that our families have a place in this celebration and that their presence and gifts be part of welcoming our new bishop.

I am grateful to Bishop Greg for his encouragement and continued support of my ministry. I also deeply appreciate the clergy, lay leaders, volunteers, and families with whom I serve. Their generosity and willingness to work together make this ministry possible.

This year has brought growth, new relationships, and difficult moments. Through it all, I have seen people care for one another and make room for others in the Church. I look forward to continuing this work so that Latino families across our Diocese can find a spiritual home, grow in faith, and share their gifts in the life of our Diocese.

Respectfully submitted,

The Rev. Nelson Serrano Poveda
Missioner for Latino Hispanic Ministries
Episcopal Diocese of San Joaquin

Commission Reports

SJRAISE

There's no doubt about it – 2026 has been a challenging time for our world, and it's been particularly difficult for our immigrant neighbors. Within the past couple of months, several family members of our cathedral's Spanish-speaking community have been detained amidst an immigrant enforcement surge that is targeting the Central Valley. At the same time, the population within the four detention centers in our diocese has soared, and even those who are trying to legally obtain residence have had those opportunities stripped away.

Amidst these harrowing times, we remember that Jesus calls us the light of the world. There is comfort in knowing that light shines most brightly in the darkness. At our diocesan immigration commission SJRAISE (San Joaquin Refugee and Immigrant Support & Empowerment), we strive to shine this light by following the biblical mandate to welcome the stranger, walking alongside immigrants in our midst, and lifting our voices for justice.

This year, we launched a new ministry in which clergy and lay people alike have begun regularly visiting detainees in the notorious California City immigrant detention center. This prison-like facility in the remote high desert of eastern Kern County has become known for serving moldy food and undrinkable water to detainees and for neglecting the medical needs of the immigrants who reside there. While visitations have been heartbreaking, they also provide hope for those inside. One woman detainee was so touched by our regular visits that she said she hopes to become an Episcopal deacon when she is released. SJRAISE members also continue to accompany immigrants to ICE check-ins and court hearings throughout the diocese, walking alongside folks during particularly vulnerable periods of their lives.

We were grateful to receive a $15,000 emergency grant from Episcopal Migration Ministries this year, and much of that money has been used to assist with commissary needs for immigrants in detention. Funds also have been used for transportation costs for immigrants who are released from detention facilities, so they can be reunited with their families. Other funds have been used for emergency situations when immigrant families are in dire need of food, temporary rental assistance or legal assistance to prevent deportation and separation from their families.

In addition to doing hands-on ministry work, we continue to support just laws for our immigrant siblings. Notably, commissioners attended city council meetings in California City to oppose the detention center there. They also traveled to Sacramento for the annual Immigrant Day of Action to speak with state senators, assembly members and legislative aides about policies related to immigrant detention centers, food and health safety, and other legislation that affects immigrants.

Our commission also continues to provide education for parishioners related to immigration matters. In that vein, we began a "road show" initiative this year, with the goal of eventually giving presentations to all the congregations in our diocese. Representatives from the commission have shared details about issues impacting immigrants while also discussing the biblical mandate to care for the "strangers" in our midst.

SJRAISE also hosted a couple of online forums to help spur education. This included an insightful conversation during Immigrant Heritage Month featuring bishops Craig Loya of Minnesota, Thomas Brown of Maine, Rob Herschfeld of New Hampshire and our very own Bishop Greg Kimura. The four bishops spoke about how to remain faithful while ICE targets some of our most vulnerable neighbors. Our commission also teamed up with the Anti-Racism Commission to host a Southwest Asian North African Heritage Month forum about the experiences of those who originate from Palestine and Iran.

We had the chance to educate ourselves this year as well, gathering with fellow Episcopal immigrant advocates throughout the state during an immigrant folk school at ECCO in July. This event came after a similar gathering in December at Camp Stevens in the Diocese of San Diego. Such collaborative efforts have helped us to not only learn from each other, but also to partner with other dioceses on joint ventures, such as gathering food and supplies for those in detention.

Looking ahead, we know there will be challenges this coming year, but there are also reasons for hope and even joy. For instance, SJRAISE will celebrate our 10-year anniversary, and we're planning to host an anniversary event in conjunction with next year's diocesan convention. Stay tuned for future updates!

In all these matters, we're grateful to our community partners for their work to defend the rights and dignity of our immigrant neighbors. We'd also like to give a special shout out to Cn. Anna Carmichael for her years of faithful service to this commission, and we wish her well in her new journey in the Diocese of Massachusetts. We're grateful to have a strong advocate in Bishop Greg as well, and we look forward to great things in the new year, even amidst these turbulent times.

Thanks to all of you who continue to provide encouragement, and thanks to the congregations of our diocese for your generous financial support during Immigrant Heritage Month.

Blessings and peace,

Dcn. Cathy Kline (Co-Chair) Emily Burnias Mother Karen Campbell Phyllis Duarte
Dcn. Tom Hampson Tristan Kratz Dcn. Amy Larsen Araceli and Brittany Miller Anna Pendergrass
Roman Rain Tree Padre Nelson Serrano-Poveda

Jonathan Partridge, SJRAISE Co-Chair

Anti-Racism Commission

The Anti-Racism Commission continued its ministry of racial reconciliation through prayer, education, and support for congregations responding faithfully to racism and exclusion. This year, our work also included significant changes in membership and leadership. As we thank those who have served, we invite more people from across the Diocese to help carry this ministry forward.

Our meetings began with prayer and a land acknowledgment honoring the Indigenous peoples whose ancestral territories encompass our Diocese. We encourage congregations in our Diocese to include a land acknowledgment in their bulletins and read it before the service or meetings. We returned regularly to shared commitments to listen with curiosity, practice humility, respect confidentiality, and make room for one another. These practices help us recognize that reconciliation requires attention to how we treat one another as well as to the issues we address.

Members brought concerns from their congregations and communities into these conversations. We reflected on the effects of immigration enforcement, requests for accompaniment at court hearings, racial violence, and the fear and division affecting many of our neighbors. We asked how to preach the Gospel in difficult circumstances and how to sustain hope while remaining accountable to those most affected.

Friday Reflection remained an important way to share the Commission’s work throughout the Diocese. Members maintained a schedule of contributions, including reflections and recommendations for further learning. Our conversations emphasized making these resources useful to congregations and amplifying voices that are too often overlooked.

For Black History Month, Dr. Barbara Vassell and Deacon Steve Bentley planned weekly articles on Black people's historical contributions. Members also proposed social media questions and sharing the livestream of the Absalom Jones worship service. These efforts connected learning about Black history with the Church's life and witness.

Other educational work widened that conversation. We recorded an Arab American History Month panel and made it available through Friday Reflection. In May, Friday Reflection featured the Rev. Florence Li Tim-Oi during Asian American, Native Hawaiian, and Pacific Islander Heritage Month, and Jack Peck offered reflections on Jewish-Christian relations. For Juneteenth, the Commission encouraged churches to include the observance in the Prayers of the People and shared social media posts in English and Spanish.

The Commission approved up to $200 toward music for the March 28 César Chávez Mass at the Cathedral and agreed to be listed as a sponsor. This commitment linked our educational work with worship and affirmed the dignity of farmworkers and Latino communities.

Members also helped prepare the gathering of the Diocese’s disability inclusion and LGBTQ+ commissions. These conversations reflected our awareness that racism intersects with other forms of exclusion, and that our ministries benefit from working together. We continued to consider opportunities for collaboration with SJRAISE, particularly around immigration and Hispanic Heritage Month.

A recurring concern was White Christian Nationalism and its consequences for the Church's witness. Members discussed the need to recognize and name it, offer education rooted in the Gospel, and tell the story of Jesus as a source of liberation. We also considered how our congregations can welcome a greater diversity of people and how the Diocese can continue to lift up marginalized voices. These questions remain part of our ongoing discernment.

During this year, several members retired from service on the Commission, including Mr. Jack Peck, the Rev. Canon Anna Carmichael, who went to serve the Diocese of Massachusetts, and Dr. Barbara Vassell, one of our co-chairs. We are deeply grateful for their ministry, the time they gave, and the wisdom they shared. Their contributions to education, reflection, and the Commission's common life have helped sustain racial reconciliation as a diocesan commitment.

As these transitions unfolded, Tamzin Wheatley and Deacon Alison Fischer temporarily assumed the responsibilities of co-chairs, while Deacon Steve Bentley enjoys a well-deserved vacation. We thank them for their willingness to provide continuity and guide the Commission through this period. The ARC also enthusiastically welcomes our new member, Odelia- Adam Roav. We also thank all who have contributed through prayer, writing, conversation, and service.

An invitation to serve

We invite members of every church in our Diocese, both lay and ordained, to prayerfully consider whether God is calling them to serve in the ministry of racial reconciliation through the Anti-Racism Commission. We particularly welcome the participation of lay members and people whose experiences and perspectives can broaden our understanding of the communities we serve.

If you are interested, please email our temporary co-chairs, Tamzin Wheatley or Deacon Alison Fischer, Odelia-Adam Roav, or Padre Nelson Serrano to express your interest and discuss appointment by our Bishop to serve on the Commission. A willingness to listen, learn, and work alongside others is an important beginning. We ask the Diocese's prayers as we welcome new members and continue this shared ministry.

Creation Care Commission

The Creation Care Commission is currently comprised of Charlene Martin (Chair), Xan Adams, Barbara Krengel, Kim Leslie, Chuck Shaeffer, and Rev. Bob Woods. We convene on the fourth Thursday of most months at 7:15 PM. We warmly invite more individuals to join us and are actively seeking a co-chair. In the upcoming year, we intend to celebrate the various days of observance that highlight the joys and challenges of our fragile island home. Additionally, we will be promoting greater participation in Earth Day, which falls on April 22nd, as well as the broader season of Creation.

Accomplishments:

1.Ongoing education regarding Advocate papers is facilitated through our articles submitted to the Friday Reflections communication.

2.Active participation with the Province VIII Creation Care Network (www.provinceviii.org/creationcare) includes attending monthly meetings and disseminating information. Two commission members, Xan Adams and Charlene Martin, attended the inaugural conference in Salt Lake City, Utah, where they shared insights on Rainwater Harvesting and Conservation. Most of the conference sessions were recorded and can be accessed via the following link: https://www.youtube.com/playlist?list=PLaKGG0aRv428www.provinceviii.org/creationcare

The Season of Creation Survey received responses from six out of twenty congregations surveyed. Several congregations conduct Blessing of the Animals services during the Season of Creation. To streamline participation, the survey consists of six one-click response questions and two optional open-ended questions. Your parish may still participate through the following link: Survey Link.

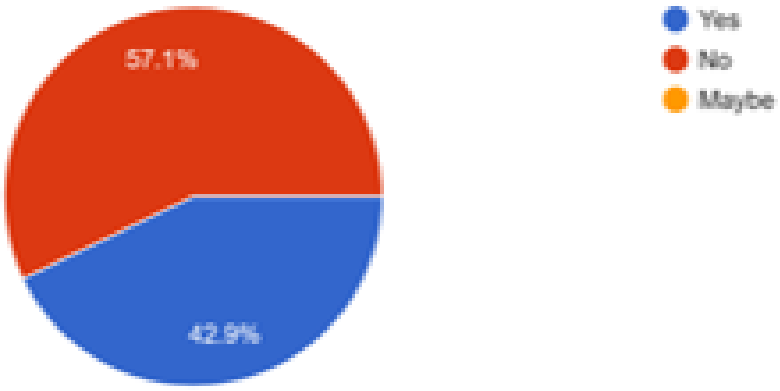
Raw results:

Are you aware of the Season of Creation, A Celebration Guide for Episcopal Parishes, New Creation Liturgies: Yes – 5 (71%), No - 2 (29%)

Did you use the Season of Creation Celebration Guide in your worship services this year or in years past? Yes – 2 (29%), No – 5 (71%)

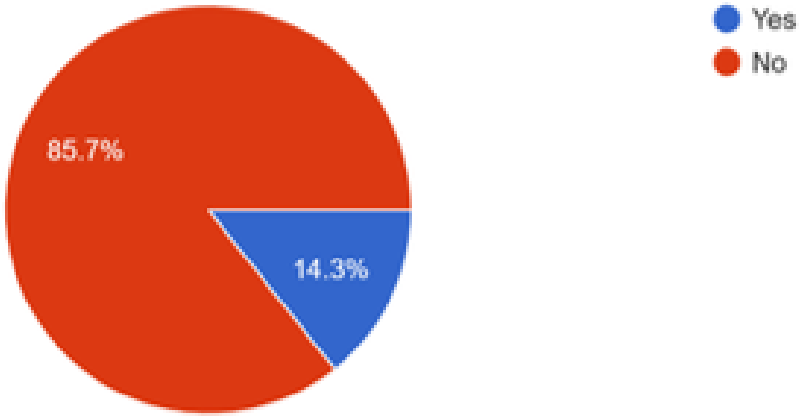
Are you aware of the ecumenical Season of Creation resources available at SeasonofCreation.org? Season of Creation

7 responses



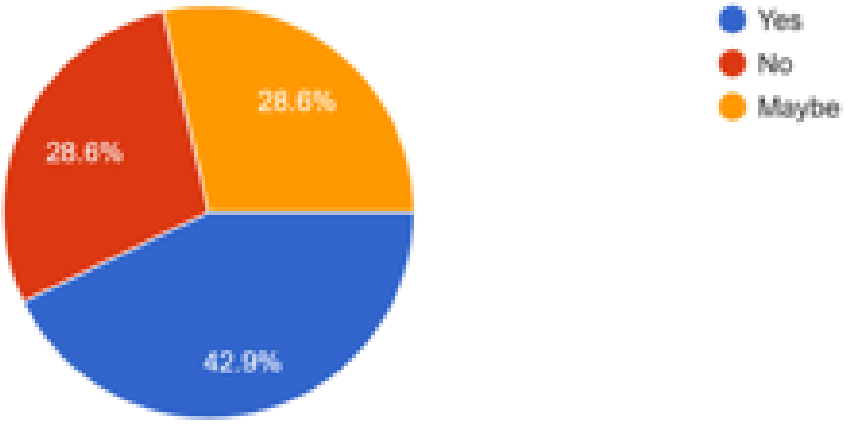
Did you hold special or extra services for this season?

7 responses



Do you feel you have all the resources you need to celebrate the Season of Creation?

7 responses



Sharing the good news of individual parish projects

Saint Matthew's Episcopal Church, San Andreas: Community Garden and Rainwater Harvesting Project continues to grow. This group has been working with their local Master Gardners on this phase of planting the raised garden beds. Stay tuned, more coming in other areas of the property





Episcopal Church of St. Anne, Stockton: Grandma's Garden was a joint project with friends from the Pease crops, Parish sextons, landscapers and the Tongan Church parishioners all pitching in, even the Primera Iglesia Bautista pastor shared expertise on raising chickens. This year the parish received a United Thank Offering (UTO) grant for this project as it addresses Creation Justice through encaging multigeneration, ecumenical events centered around a shared garden.













Episcopal Church of St. John the Baptist, Lodi: California Native Plant Garden, Bags to Benches Program, Greening our kitchen is working, we continue to refill the bottles with Deacon Cleaning Solution added a new program, Sunset Salon during Season of Creation where parishioners shared poems, songs, letters, and bible passages inspired by God's gift of Creation.

St. Paul's Episcopal Church, Modesto hosts a Bags to Benches program.
St. James' Episcopal Church, Sonora, Community Garden



Disability Inclusion Commission

One of the two newest diocesan commissions, the Disabilities Inclusion Commission, had its inaugural meeting in May of 2026. In attendance were Deacon Alison Fischer, Deacon Amy Larson, Deacon Marilee Muncey, Canon Anna Carmichael, and Claude Muncey from St. Francis, Turlock.

We began with what we characterized as a soft-opening stage as we began to discern what is our best first step in fulfilling our charge of Fellowship/Community Building, Education, and Advocacy. Noting that we are currently without allocated funds until 2027, we brainstormed on what our commission could offer and potential resources currently available from either Episcopal or Lutheran sources. Historically, Episcopal disability resources were plentiful; however, we quickly discovered that many previous Episcopal sources have lapsed while Lutheran and other mainline church sources are still active.

There was much discussion on the many conditions that can be included in the term “disability” or “disabled” and how parishes may have parishioners/attendees/visitors who have more hidden disabilities that are not readily apparent. All our imagining seemed to come down to the idea of how we welcome people to our faith communities and how expansive our welcome must be.

Our commission, and in fact, each of our commissions operate from the perspective of love and welcome. The foundational assumption of the Disability and Inclusion Commission is that without love there can be no true welcome. It is love that keeps every person in our communities truly welcome as individuals loved by God as they are.

The Disabilities Inclusion Commission participated in all the plenary sessions and met together as a commission during the Sacred Belonging Planning Retreat on September 18-19, 2026, at ECCO. Present were Deacons Alison Fischer, Amy Larsen, and Marilee Muncey. There is an exciting, and positive energy across the diocese.

The main part of our work that weekend was deciding what the Disability Inclusion Commission would be offering to everyone in the diocese in the remaining months of this year and into 2027. Deacon Amy shared the doctoral capstone project of Ashley Westover, a Doctor of Occupational Therapy student at Baylor University title, Supporting Disabilities in Church: An Occupational Therapy Student’s Perspective. Dr. Westover’s insights and practical suggestions are something we look forward to sharing with our faith communities as needed. Our first Friday Reflection piece, Beyond the Ramp: Building a Seat at the Table for Everyone, written by Deacon Amy was an excellent introduction to the work of the commission inviting everyone to consider who had a seat at the table and opening commission membership to the diocese.

In early 2027 we hope to send out a brief survey to all congregations centering on three questions: 1. What experience have you had with (listing conditions and inviting others to be named)? 2. How have you opened your congregational life to individuals and families living with them? And 3. How can we help you? We expect that the completed surveys will provide additional information and direction both to us and to the diocese.

In January, Deacon Alison hopes to begin an on-line formation and study series centering on the Imago Dei and structured broadly enough (covering more than just disability) to attract diocesan-wide participation including members of each of the diocesan commissions and how this affects their specific areas of ministry.

If this has piqued your interest, come join us; all are welcome. For more information, please contact any member of the commission: Deacon Alison Fischer (St. John, Stockton), alisonmfischer1@gmail.com, Deacon Amy Larsen (St James Sonora), alar4026@gmail.com, Deacon Marilee Muncey (St. Francis, Turlock), marileemuncey@comcast.net, Claude Muncey (St. Francis, Turlock), cmuncey@gmail.com.

Respectfully submitted,

The Rev. Dn. Marilee Muncey

LGBTQ+ Commission

The Rainbow Covenant, the LGBTQ+ Commission of the Episcopal Diocese of San Joaquin, was established in early 2026 as one of the final episcopal initiatives of the Rt. Rev. David Rice. Its creation reflected the Diocese's ongoing commitment to becoming a more inclusive, welcoming, and affirming community of faith, particularly for LGBTQ+ individuals and their families.

With the support of the Rev. Canon Anna Carmichael, a diocesan-wide invitation was extended to those interested in serving on this newly established commission. The response was encouraging, with substantial interest and participation from all three deaneries of the Diocese. This enthusiastic response demonstrated both the need for this ministry and the willingness of people throughout our Diocese to work together toward greater inclusion and belonging.

Initially, the Commission was guided by a coordinating committee consisting of the Rev. Betsy McElroy, Deacon Carolyn Woodall, the Rev. Nelson Serrano, and Dani Wilson. Following the retirement of Deacon Carolyn Woodall and the Rev. Betsy McElroy, Father Nelson Serrano and Dani Wilson assumed leadership as Co-Chairs of the Commission.

Since its establishment, The Rainbow Covenant has met regularly on a monthly basis, with the exception of August and September, as preparations were underway for the Diocesan Commissions Retreat held in September. These meetings have provided opportunities for prayer, conversation, reflection, and discernment as we continue to explore the Commission's role within the life and mission of our Diocese.

Much of our work during this first year has focused on understanding how the Commission can best serve our congregations and LGBTQ+ communities. We recognize that many of the communities in which our churches are located face challenging social and political circumstances, including public policies and actions that negatively affect LGBTQ+ individuals. In this context, we have been discerning how our Diocese can offer a faithful Christian response grounded in the Gospel, the dignity of every human being, and our baptismal commitment to respect the dignity of all people.

The participation of Commission members in the September Diocesan Commissions Retreat was particularly valuable. It helped us gain a clearer understanding of our responsibilities and identify practical ways to move forward. Building on this experience, our October meeting was especially productive and marked an important step in moving from reflection to action.

During that meeting, the Commission approved the allocation of funds to print and distribute educational and pastoral resources. These materials will highlight the history of LGBTQ+ inclusion and affirmation within The Episcopal Church, recent developments in liturgical and pastoral resources for accompanying and supporting transgender individuals, and a directory of congregations throughout the Episcopal Diocese of San Joaquin. Through these resources, we hope to help LGBTQ+ individuals and their families recognize that they are not alone and that there are communities of faith throughout our Diocese where they can find welcome, fellowship, and opportunities to participate in Sunday worship.

Another important aspect of our work has been supporting Pride celebrations and initiatives organized by congregations throughout the Diocese. During 2026, with the valuable assistance of Ashley and Andrew, the Commission supported Pride events in Hanford and Visalia. These experiences demonstrated the importance of collaboration among congregations and the value of making the Church's presence visible in celebrations that affirm the dignity, diversity, and lives of LGBTQ+ people.

Looking ahead, The Rainbow Covenant intends to strengthen its support for Pride events and other LGBTQ+ affirming initiatives throughout the Diocese. We also hope to become a resource for congregations responding to local public policies and decisions that affect LGBTQ+ communities. Our goal is to help our churches engage these challenges with compassion, informed understanding, and a clear commitment to justice, dignity, and inclusion.

As we conclude this first year, we recognize that much of our work has involved laying the foundations for a ministry that will continue to grow and develop. We are grateful for the dedication of our Commission members, the support received from across the Diocese, and the opportunity to contribute to the Church's mission of reconciliation, justice, and love.

We look forward to continuing this work together, trusting that the Holy Spirit will guide us as we seek to make our congregations places where every person can experience God's unconditional love and truly know that they belong.

Respectfully submitted,

The Rev. Nelson Serrano
Dani Wilson
Co-Chairs, The Rainbow Covenant
LGBTQ+ Commission
Episcopal Diocese of San Joaquin

2026 Necrology Report

St. Paul's Episcopal Church, Bakersfield
Diana Gayle Conner
Gary Ferguson
Linda Mackey
Kamala Marie Meadows
Jerry Pettiford
Donna Roope
Lorraine Rose

St. James Episcopal Cathedral, Fresno
Indera Rebecca Wilson
Phyllis Scott Johnson

St. John the Baptist, Lodi
Lois Lilley
Donald Robert Smith
Betty Bandelin
John Ledbetter
Colleen Walton
Marilyn Cook
Jeffery Lobb
Robert Hoffman, Sr.

St. Raphael's Episcopal Church, Oakhurst
Suzanne Harvey

St. Paul's Episcopal Church, Modesto
Christine Judd

St. Matthew's Episcopal Church, San Andreas
Joel David Pitto

St. James' Episcopal Church, Sonora
Jan Potter

St. John the Evangelist, Stockton
Melinda Vaca

St. John's Episcopal Church, Tulare
Janet McCoy
Lynda Davis

St. Francis' Episcopal Church, Turlock
Pastor Sylvia Mueller
Patrick Wayne Flood
Nedra Voorhees

St. Paul's Episcopal Church, Visalia
Duane Schafer
Nancy Houk
Lori Phillips
Rhoda Immer

EDSJ
Delores Huerta
Dolly Parton

EDSJ List of Canonically Resident Clergy Eligible to vote at the Annual Meeting of Convention
November 6-7, 2026

Per Constitution Diocese of San Joaquin Article V, Sec. 6.: The Bishop, the Bishop Coad jutor, the Suffragan Bishop, the Assisting Bishop and other qualified Bishops, Presbyters, and Deacons shall each have a seat and vote in Convention, provid ed they have been canonically resident within the Diocese for three calendar months next before the meeting of Convention and provided they have been domiciled therein, or an outside the diocese approved by the Ecclesiastical Authority

Name	Order	Cure/Status	Deacon	Priest	Canonical Residency
Anderson, Eldon Wayne	Priest	Retired	10-Mar-12	6-Oct-12	10-Mar-12
Backlund, Michael Anders	Priest	Retired	4-Apr-78	28-Oct-81	18-Jun-16
Bentley, Stephen Richard	Deacon	Deacon, St John's Stockton	20-Jul-13		20-Jul-13
Bernthal, Gail Elizabeth	Priest	Retired, Supply	15-Aug-15	23-Apr-16	15-Aug-15
Blair, Rebecca Homans	Priest	PIC, St Anne's Episcopal & Zion Lutheran	1-Jun-98	11-Jun-99	26-Sep-22
Brown, Keith Burton	Priest	Retired	16-Jan-83	9-Dec-84	18-Jan-85
Castro, Reinel	Priest	Prison Chaplain	Received, RC	1-May-22	8-Jan-24
Correa, Trino Cortes	Priest	Retired	Received, RC	4-Apr-96	19-Apr-97
Dawson, Brian	Priest	PIC, St Paul's Modesto	16-Sep-00	10-Dec-00	24-Jul-24
Fischer, Alison	Deacon	Deacon, St John's Stockton	23-Jan-23		23-Jan-23
Galicia, Kathryn Kitchen	Priest	Retired, Supply	3-Jun-06	2-Dec-03	14-Apr-08
German, Kenneth L	Priest	Retired	29-Jun-66	11-Mar-67	15-Feb-90
Hampson, Thomas	Deacon	Retired	1-Dec-18		1-Dec-18
Huggard, Linda	Priest	PIC, St Mary the Virgin, Elk Grove	02-Jun-07	21-Dec-07	9-Sep-08
Jacoby, Lisa	Deacon	Deacon, St Paul's Bakersfield	1-May-16		20-May-22
Key, Nancy Anne	Deacon	Retired	15-Aug-15		15-Aug-15
Kline, Catherine Mary	Deacon	Deacon, St Michael's Ridgecrest	23-Jan-21		23-Jan-21
Larsen, Amy Louise	Deacon	Deacon, St James Sonora	1-Dec-18		1-Dec-18
March, Theresa Dianne	Deacon	Deacon, St John's Tulare	23-Jan-21		23-Jan-21
Martinez, Luke Aaron	Priest	PIC, Church of the Saviour Hanford	11-Jun-22	29-Jul-23	11-Jun-22
Masztal, Gregory Thomas	Deacon	Deacon, St Paul's Modesto	1-Dec-18		1-Dec-18
Matthews, Karen	Priest	PIC, St James Sonora & St Matthew's San Andrea	28-Oct-06	24-Nov-07	30-Jul-24
McDonald, James Wallace	Priest	Retired	29-Jun-68	25-Jan-69	23-Aug-72
McElroy, Elizabeth	Priest	Rector, St John's Lodi	3-Dec-22	18-Jun-23	30-Oct-23
Morlan, Lynette Kay	Priest	Retired, Supply	5-Jun-04	5-Dec-04	14-Apr-08
Muncey, Marilee Elliott	Deacon	Deacon, St Francis Turlock	1-Dec-18		1-Dec-18
Pallares, Jorge E Arellano	Priest	PIC, St Michael's Ridgecrest	29-Apr-06	16-Dec-06	9-Sep-22
Rodriguez, Luis Mario	Priest	PIC, St Paul's Bakersfield	28-Jun-87	4-Jul-99	17-Dec-18
Shumaker, John Hilton	Priest	Retired	25-Oct-75	2-Jun-76	15-Apr-01
Serrano-Poveda Nelson	Priest	Latino Missioner	25-Jul-15	18-Jul-20	18-Mar-20
Shezi, Noni	Priest	PIC, St John's Stockton			
VanHuss, Terri	Deacon	Retired, living outside the diocese	28-Jun-14		28-Jun-14
Vivian, Tim	Priest	Retired	25-Jun-88	31-Dec-88	14-Apr-08
Ward, Suzy	Priest	Retired, Supply	14-Jun-97	27-Jun-09	14-Jun-97
Wilcox, John Milton	Priest	Retired	8-Jun-52	12-Dec-52	5-Nov-52
Woodall, Carolyn Louise	Deacon	Deacon, St. James, Sonora	10-Mar-12		10-Mar-12
Woods, Robert Douglas	Priest	Vicar, St Sherrian's Kernville	28-May-88	11-May-89	28-May-88

Certified as correct as of November 3, 2026



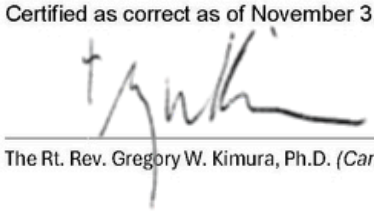
The Rt. Rev. Gregory W. Kimura, Ph.D. (*Cantab.*), Bishop

EDSJ List of Canonically Resident Clergy who are NOT eligible to vote at the Annual Meeting of Convention
November 6-7, 2026

Per Constitution Diocese of San Joaquin Article V, Sec. 6.: The Bishop, the Bishop Coad jutor, the Suffragan Bishop, the Assisting Bishop and other qualified Bishops, Presbyters, and Deacons shall each have a seat and vote in Convention, provid ed they have been canonically resident within the Diocese for three calendar months next before the meeting of Convention and provided they have been domiciled therein, or a ministry outside the diocese approved by the Ecclesiastical Authority.

Name	Order	Cure/Status	Deacon	Priest	Canonical Residency
Andres, Justo Rambac	Priest	Retired, living outside the diocese	1-Apr-55	1-Oct-55	1-Jul-83
Burk, John H.	Priest	Retired, living outside the diocese	11-Jun-66	1-Dec-66	17-Sep-82
Duval, Richard Henri, Jr	Priest	Retired, living outside the diocese	25-Jun-56	26-Feb-57	7-Mar-00
Hall, Mark Heathcote	Priest	Retired, living outside the diocese	16-Sep-75	16-Mar-76	14-Nov-85
Hamilton, Terrell Eugene	Priest	Retired, living outside the diocese	16-Dec-79	1-Dec-80	16-Dec-79
Henry, Richard Arlen	Priest	Retired, living outside the diocese	12-Jun-61	16-Dec-61	12-Jun-61
Hill, Vernon W., Jr	Priest	Retired, living outside the diocese	15-Nov-08	30-May-09	15-Nov-08
Jacobs, Connie Hartquist	Deacon	Retired, living outside the diocese	25-Jun-79		10-Oct-10
Livingston, Philip Irving	Priest	Retired, living outside the diocese	29-Jan-57	17-Aug-57	19-Nov-98
Murray, Robert Scott	Priest	Retired, living outside the diocese	25-Jul-87	1-May-88	25-Jul-87
Patterson, John	Priest	Retired, living outside the diocese	1-Dec-61	1-Dec-62	24-Apr-78
Risard, Frederick William	Priest	Retired, living outside the diocese	10-Dec-05	11-Jun-06	10-Dec-05
Short, James Ritchie	Priest	Retired, living outside the diocese	4-Jun-77	16-Jun-78	4-Jun-77
Smith, Jeffrey Bradford	Priest	Retired, living outside the diocese	22-Feb-86	1-Apr-87	22-Feb-86
Thompson, James Edwin	Priest	Retired, living outside the diocese	16-Nov-75	1-Jun-94	2-Nov-04
Williams, Richard Alan	Priest	Retired, living outside the diocese	10-Jun-82	17-Oct-82	26-Sep-90

Certified as correct as of November 3, 2026



The Rt. Rev. Gregory W. Kimura, Ph.D. *(Cantab.),* Bishop

EDSJ List of Non-Canonically Resident Clergy
November 6-7, 2026

Per Constitution Diocese of San Joaquin Article V, Sec. 6.: The Bishop, the Bishop Coad jutor, the Suffragan Bishop, the Assisting Bishop and other qualified Bishops, Presbyters, and Deacons shall each have a seat and vote in Convention, provided they have been canonically resident within the Diocese for three calendar months next before the meeting of Convention and provided they have been domiciled therein, or a ministry outside the diocese approved by the Ecclesiastical Authority.

Name	Order	Cure/Status	Deacon	Priest	Canonical Residence
Campbell, Karen	Priest	Retired, Licensed 2025			Long Island
Dondi, Edward	Priest	Hospital Chaplain, Licensed 2025			Nairobi
Hagan, Christian	Priest	Assisting Priest, St Anne's Stockton, Licensed 2025			Freetown

Certified as correct as of November 3, 2026

The Rt. Rev. Gregory W. Kimura, Ph.D. *(Cantab.)*, Bishop

The Episcopal Diocese of San Joaquin

Minutes of the 66th Annual Convention, November 8, 2025 held at ECCO

Draft for Approval at 67th Annual Convention

1. THE CHAIR CALLS THE MEETING TO ORDER

a. The Rt. Rev. David Rice, Bishop, called the annual meeting to order at 10:40 a.m. and gave a Land Acknowledgment: *"We acknowledge that this Meeting is taking place in the un-ceded territory of California home to nearly 200 tribal nations. As we begin this meeting, we acknowledge and honor the original inhabitants of our various regions, including the Yokuts, Paiute, Miwok, Ohlone, Chukchansi, Western Mono, Me-Wuk, Chumash and the Tubatulabal. A land acknowledgement is a critical step towards working with native communities to secure meaningful partnership and inclusion in the stewardship and protection of their cultural resources and homelands. Let's take a moment to honor these ancestral grounds that we are collectively gathered upon and support the resilience and strength that all Indigenous people have shown worldwide."*

2. EXPLANATION OF PROCEDURAL INFORMATION FOR CONVENTION

a. Bishop David reminded those assembled that the business today was an expression of "church.., worship…and our faith and service together." He then called upon Cindy Smith, the Secretary of Convention, to provide procedural information and "Best Practices" for today's meeting. The Secretary announced that today's convention would be recorded. She brought attention to the use of the Electronic Convention Booklet (ECB) throughout the meeting.

b. The Secretary instructed attendees wishing to submit late resolutions and/or budget amendments from the floor to submit them in written form at the dais and also via email to the Secretary of Convention by 11:00 a.m., and reminded convention that a Late Resolution must receive a 2/3rds majority vote in order to be considered, or 3/4ths majority if it seeks to amend the Diocesan Canons and/or Constitution. If the Motion to Consider passes, discussion and a vote to adopt may take place.

c. The Secretary explained that if you wish to address Convention, raise your hand. Once you are recognized by the Bishop, please stand in place, if able, and identify yourself with your name and parish before making a motion or second, even if the Bishop has used your name which is vital for the official audio recording of the meeting. To speak to an issue, bring forward a new motion or have a question, step to the microphone and wait to be recognized by the Bishop. Once recognized, always identify yourself with your name and parish before proceeding.

d. The Secretary advised delegates to state why you are speaking - To make a motion; To second a motion on the floor; To enter the discussion or debate, while also indicating whether you wish to speak for or against the issue; or To ask a question.

e. Who may vote. If you are an elected delegate or canonically-resident clergy, you have Seat, Voice and Vote. If you are not canonically-resident clergy, you have Seat and Voice, but no Vote. If you are an observer, you typically do not have Seat, Voice or Vote. Some groups are granted Seat and Voice as a courtesy – the laity from Diocesan Council, Standing Committee, Deputies, etc., so they might participate in debates and discussions. If you do not have "Vote" - you may not vote, or make a motion, or second a motion.

f. If you do not agree completely with a proposed resolution or another person's motion, but see some value in it, you can offer an amendment rather than just voting "No". If a majority agrees to the amendment, it will modify the original resolution or motion. Convention will then vote again on the amended resolution or amended motion as a final action. When you propose an amendment, you must submit precise language of the proposed change. Be prepared with your language, typically in writing with a copy delivered to the dais, when you propose an amendment.

3. INTRODUCTION OF NEW CLERGY

a. Bishop David introduced and welcomed a staff member in their new role and encouraged Convention to extend their thanks and welcome.

- Roxann McSpadden – as Diocesan Administrator, in addition to Cathedral Administrator.

4. TAKING OF THE ROLE AND REPORT OF QUORUM

a. Bishop David called upon the Secretary of Convention for a report of the Registration of Clergy and Lay Delegates and the report of the Credentials Committee as to the presence of a Quorum.

b. Ms. Cindy Smith reported that the Credentials Committee - Chancellor Michael Glass, Registrar The Rev. Canon Anna, and Secretary of Convention Ms. Cindy Smith - certifies that at least one-third of all clergy entitled to seat and vote are present and at least one-third of all congregations are represented by at least one lay delegate which constitutes a quorum per Canon 3, Sec. 1 of the Diocesan Canons.

c. Bishop David thanked the Secretary, and declared a Quorum is present and the Convention is organized for business.

5. CONVENTION APPOINTMENTS

a. Bishop David made the following appointments for the 66th Annual Convention of this diocese:

- Secretary of Convention: Ms. Cindy J. Smith
- Chancellor and Parliamentarian: Mr. Michael Glass
- Dispatch of Business: The Rev. Gail Bernthal
- Teller: Ms. Jan Dunlap

6. REVIEW OF VOTING PROCEDURES & PRACTICE VPOLL VOTE

a. Bishop David called upon the Secretary of Convention to explain the voting process.

b. The Secretary described the two forms of voting to be used at this Convention, 1) a Yes or No vote that may be conducted by a voice vote or show of hands, and 2) Election Balloting using the VPOLL platform, requiring voters to use an internet-capable device to access the VPOLL site and, after submitting their unique voting credentials, selecting their choice on each on-screen ballot. She explained that the voting credentials were distributed in the name badges, and reviewed the offices that would be elected in today's session. She reviewed that, per Canon, the first round of voting requires a simple majority (50%+1) and subsequent ballots merely a plurality. Also, specifically in the case of Deputies to General Convention, an ordered ranking was required for all open seats (both lay and clergy) for the election to be considered as final.

c. The Secretary pointed out that today's Consent Agenda included a Resolution to facilitate Deputy elections allowing for, in the event of a tie or need to establish the ranking of Deputies to the General Convention, the Secretary by resolution may reduce the number of votes to be cast for each election by one vote less than the number of candidates seeking election.

d. To abstain from a vote, simply do not cast your vote. If it is determined that a ballot is invalid for some reason, the Chair will call for the ballot to be repeated. If a choice is not made on a first ballot, a second ballot will be cast later in the day, and so forth. Election result may be given immediately or later in the day.

e. A Practice Vote was rescheduled for later in the day while internet issues were being addressed.

7. MOTION TO ADOPT THE AGENDA AND CONSENT AGENDA

a. Bishop David called upon The Rev. Gail Bernthal, Dispatch of Business. The Rev. Gail Bernthal moved to adopt the proposed agenda as printed beginning on page 4 of the Electronic Convention Booklet (ECB) distributed to the delegates and entered into the record. Bishop David called for and received a second from Ms. Kim Odenweller, St. Anne's, Stockton. He called for a Yes/No voice vote to adopt the proposed Agenda. The motion carried.

b. Bishop David called upon Dispatch of Business to introduce the Consent Agenda and explain the adoption process. The Rev. Gail Bernthal explained: The Consent Agenda, as printed on page 6 of the convention booklet, distributed to delegates, will be enacted as a whole by one motion and one vote. If discussion is desired by the Convention on any Consent Agenda item, any delegate may request to remove that item by raising your hand to be recognized. The Chair of Convention will remove that item from this agenda to be considered in the regular order of business.

c. The Rev. Gail Bernthal moved to adopt the Consent Agenda, as printed and distributed to the delegates. Bishop David called for and received a second from The Rev. Betsy McElroy, St. John the Baptist, Lodi. Bishop David called for discussion; hearing none, called for a Yes/No voice vote to adopt the Consent Calendar. Motion carried. (see Exhibit section for Consent Calendar text)

8. NECROLOGY REPORT

a. Bishop David asked all to stand if able and be still. May they rest in peace and rise in glory. The Necrology Report of those who have died since the last meeting of convention in 2024 appears on page 112 of the ECB, and was read into the record by Bishop David, as follows:

St Paul's, Bakersfield
Michael Gardner

St James Cathedral, Fresno
Ashok Ralph Milton
Ian Douglas MaCagy

St John the Baptist, Lodi
Vanessa Thierry
Roger McLord
Richad Cress
Ken Morgan
Polly Morgan
Vinita Shinn

St. Paul's, Modesto
James Arnold Roberson
Christine Jayne
Mary Kinnaman
Rev. Deacon George Cano
Michael Thorington
Kim Pew
Elanie Paradis
Janet Sue Rhods
Ronald Curtis Crawford
Sue Crawford
Mary Schonwald Kinnaman

St. Michael's, Ridgecrest
Pepper Jane Johanson
Margarette Nadine King

St. James, Sonora
Marlene Bottomly
Lawrence Marum

St. Francis, Turlock
Leslie Ann Littlefield

St. Paul's, Visalia
Hank Marschall
Betty Wenn

9. REPORT OF CONGREGATIONS IN ARREARS IN ASSESSMENTS

a. The Bishop called upon Deacon Greg Masztal, Diocesan Treasurer, to report those congregations who are in arrears in assessments. The Diocesan Treasurer reported, “Bishop David, I certified yesterday that all congregations are current in assessments; therefore, all congregations are eligible for seat, voice, and vote without further action by this convention.” The Bishop thanked and excused the Treasurer.

10. MOTION TO APPROVE NOMINATIONS TO COMMISSION ON MINISTRY

a. Bishop David acknowledged and thanked the following outgoing members of the Commission on Ministry, and invited acclimation from convention:

- Ms. Candice Gale - St John’s, Lodi
- Ms. Patricia Pallares - St Michael’s, Ridgecrest
- Dr. Barbara Vassell (Co-Chair) - St Paul’s, Modesto

b. Bishop David informed Convention of the following appointments, which were approved by the Standing Committee, for new members of the Commission on Ministry who are filling a vacancy:”

- Class of 2027 - Mr. Michael Cava - St Paul’s, Bakersfield
- Class of 2026 - Mr. Paul Siebuhr - St John’s, Tulare

c. Bishop David submitted the following nominations for confirmation of members to serve on the Commission on Ministry for the Class of 2029.

<u>Class of 2029:</u>

- The Rev. Luke Martinez – Episcopal Church of the Saviour, Hanford (second term)
- Ms. Anna Pendergrass – St Paul’s, Visalia

d. Bishop David called for a motion for Annual Convention to confirm these nominations, as submitted, as persons who shall serve as members of the Commission on Ministry. The Rev. Suzy Ward, St. Paul’s, Visalia, moved to confirm the nominations. Second by Dcn Cathy Kline, St Michael’s, Ridgecrest. Bishop David called for discussion; hearing none, called for a Yes/No voice vote to confirm. Motion carried.

11. MATTERS REQUIRING CONFIRMATION OF DIOCESAN CONVENTION

a. *Confirmation of Cathedral Chapter Members:* Bishop David notified convention that per Diocesan Canon 17.02, and Article VII of the Cathedral Constitution, the congregation of St. James’ Parish Church, Fresno has duly nominated the following persons to serve as members of the Cathedral Chapter with biographies beginning on page 7 of the ECB:

- Ms. Vicki Curtis
- Ms. Yolanda Herrera
- Ms. Pamela Johnston
- Mr. Joseph Kieta
- Ms. Cheryl McDonald
- Mr. Ernesto Lovos Melendez
- Ms. Shar Reagan
- Mr. Andrew Simpson

b. Bishop David called for a motion for Annual Convention to confirm the nomination of these Chapter members. Deacon Nancy Key, St. James' Cathedral moved to confirm the nominations; seconded by The Rev. Nelson Serrano Poveda, St. James' Cathedral. Bishop David called for discussion; hearing none, called for a Yes/No voice vote to confirm. Motion carried.

12. REPORT FROM THE CHAIR OF THE NOMINATIONS COMMITTEE

a. Bishop David acknowledged and thanked the following outgoing members of Standing Committee (SC) and Diocesan Council (DC), and asked Convention to give thanks for their service:

Standing Committee

- Mr. Jonathan Partridge, St. John's, Stockton
- Rev. Suzy Ward, St. Paul's, Visalia

Diocesan Council

- Ms. Stephanie Gilmer, St. Paul's, Modesto
- The Rev. Deacon Terry March, St. Paul's, Visalia
- Ms. Jan Dunlap - St. Paul's, Bakersfield

b. Bishop David called upon Ms. Jan Dunlap, Chair of the 2025 Nominations Committee to present the results of the Deanery Elections.

c. Ms. Dunlap reported the results of the Deanery elections for Diocesan Council were as follows: Northern Deanery: There were no open positions. Central Deanery: The Rev. Deacon Nancy Key, St. James' Cathedral, Fresno Southern Deanery: Ms. Jan Dunlap, St. Paul's, Bakersfield

d. Bishop David called upon the Chair of the Nominations Committee to present the nominees for the open offices to be voted on at this convention.

e. Ms. Dunlap explained, we have up for election to Standing Committee, one Lay & one Clergy positions; for Diocesan Council, one Lay position; and for Deputy to General Convention, 4 Lay & 4 Clergy and for Alternate to General Convention, 4 Lay & 4 Clergy. The following names have been entered into nomination:

Standing Committee: (for One Lay–4-year term – Class of 2029 - ELECT 1):

- Ms. Beth Elwood - St. John's, Lodi
- Mr. Marshall Johnston PhD - St. James' Cathedral, Fresno

Standing Committee: (for One Clergy–4-year term – Class of 2029 - ELECT 1):

- Rev. Brian Dawson - St. Paul's, Modesto
- The Rev. Luke Martinez - Church of the Saviour, Hanford
- The Rev. Deacon Marilee Munsey - St. Francis, Turlock

Diocesan Council: (At-Large Lay– 3-year term – Class of 2028 - ELECT 1):

- Mr. Joseph Kieta - St. James' Cathedral, Fresno
- Mr. Joey Soria - St. John's, Lodi

Deputy to 82nd General Convention: (Lay– 3-year term – ELECT 4 Deputies & 4 Alternates, ranked):
• Ms. Frances Bott - St. John's, Lodi
• Dr. Skylar Carlson - St. John's, Stockton
• Ms. Melissa Crider - Church of the Saviour, Hanford
• Ms. Jan Dunlap - St. Paul's, Bakersfield
• Ms. Candice Gale - St. John's, Lodi
• Ms. Charlene Martin - St. John's, Lodi
• Ms. Cindy Smith - St. Paul's, Bakersfield

Deputy to 82nd General Convention: (Clergy– 3-year term – ELECT 4 Deputies & 4 Alternates, ranked):
• The Rev. Brian Dawson - St. Paul's, Modesto
• The Rev. Deacon Cathy Kline - St Michael's, Ridgecrest
• The Rev. Luke Martinez - Church of the Saviour, Hanford
• The Rev. Betsy McElroy - St. John's, Lodi
• The Rev. Nelson Poveda - Diocesan Latino Missioner

f. Bishop David called attention to the Voter's Guide with biographies, included in the ECB/Electronic Convention Booklet on pages 11 -18, and asked the delegates to consider the candidate's qualifications for each position before submitting nominations from the floor. Bishop David thanked and excused the Nominations Chair.

13. CALL FOR NOMINATIONS FROM THE FLOOR

a. Bishop David asked the Chair of Nominations, Ms. Jan Dunlap, if any nominations have been received electronically during the meeting. The Nominations Chair reported no nominations have yet been received.

b. Bishop David called for all nominations from the floor for Standing Committee, Lay position; there were none; called for a motion to close nominations for this position. Mr. Paul Siebuhr, St John's, Tulare moved that nominations be closed for Standing Committee Lay; second by Ms. Pam Johnston, St. James' Cathedral, Fresno. Bishop David called for a voice vote to close nominations. Motion carried.

c. Bishop David called for nominations from the floor for Standing Committee, Clergy position; there were none. The Parliamentarian suggested that nominations remain open as we move through the open positions, with one call to close after all positions have been presented. The Chair agreed.

d. Bishop David called for nominations from the floor for Diocesan Council, At Large-Lay position. there were none.

e. Bishop David called for nominations from the floor for Deputy to 82nd General Convention, Lay position. He recognized Dcn. Marilee Muncey, St Francis, Turlock, who nominated Mr. Claude Muncey, St Francis, Turlock. Mr. Muncey accepted. There were no additional nominations.

f. Bishop David called for nominations from the floor for Deputy to 82nd General Convention, Clergy position. He recognized Dcn. Greg Masztal, St. Paul's, Modesto, who nominated Canon Anna Carmichael, Diocese of San Joaquin. Cn. Carmichael accepted. There were no additional nominations.

g. Bishop David called for a motion to close nominations for all positions. Ms. Kim Odenweller, St. Anne's, Stockton moved that nominations be closed; second by Ms. Josefina Powe, St. John's, Stockton. Bishop David called for a voice vote to close nominations. Motion carried.

h. Bishop David declared that nominations from floor are now closed, for all offices.

The Bishop announced that several agenda items were being reordered to expedite the meeting. (note: original Agenda section numbers will be shown in this document.)

14. FINANCIAL REPORTS AND MOTION TO APPROVE BUDGET

a. Bishop David explained to Convention that the 2026 Proposed Budget was presented in detail to all delegates and others attending the October Deanery Day, and they have had some time to examine it in detail. He asked Convention to limit discussion to additional questions not already addressed at the previous budget presentation.

b. Bishop David called upon Diocesan Treasurer, Deacon Greg Mazstal, to present the 2026 Proposed Budget. The Treasurer's Report, the 2025 Financial Reports, the Proposed 2026 Budget, and Audit Reports for 2022 and 2023 can be found on pages 19 through 84 of the Electronic Convention Booklet/ECB.

c. The Diocesan Treasurer stated, "The 2025 financial report as of September 30th is submitted. Even though Reserve Investment Account Dividends are $61k less than expected, we are overall $66k under budget as of September." The Treasurer also expressed thanks for those congregations that have reduced the amount of their ask for grant assistance, as it has aided in the reduction of the drawdown from diocesan investment accounts from 9.6% to 7.95% moving towards the goal of 6%. He pointed out at the Bishop Search process is currently under budget with some tasks remaining. "After extensive work by the Finance Committee the 2026 Budget was presented to the Diocesan Council, and then on Deanery Day in October to the delegates and clergy. Bishop, I present the 2026 Proposed Budget to Convention."

d. The Bishop thanked the Diocesan Treasurer, and moved, "That the 2026 budget as presented by the Diocesan Treasurer, be approved by this Convention and entered into the record." Bishop David called for and received a second from Deacon Terry March, St. Paul's, Visalia. Bishop David called for discussion; hearing none, called for a voice vote to confirm. Motion carried.

e. Bishop David called upon the chair of the Finance Committee, Dcn. Teri Van Huss, to come forward. Recognizing Deacon Teri's impending move out of state, he expressed the thanks of the diocese for her many years of work and services, and she received a rousing ovation from Convention and spoke briefly.

15. FIRST BALLOT

a. At the Chair's request, the Secretary conducted two practice election-style votes with Convention.

b. Bishop David called upon The Secretary to explain the ballot voting method with the vPoll platform. It was explained as follows: "All certified delegates and eligible clergy shall vote one selection each for the Standing Committee and Diocesan Council offices. For an Election ballot, you will go to the voting portal, select the Meeting, and login with the unique credentials that were sent to you. Do not share your credentials – if you do not have your credentials, raise your hand for assistance. You will be presented with a ballot, which will include instructions on how many candidates to vote for. The ballot will appear on your screen, and you have two minutes to submit your ballot, a timer appears at the top. As we approach the two-minute mark, the Bishop will say "the vote is closing," then "the vote is closed." The Bishop will then proceed to the next office election, and the third office election. The certified results of the first balloting will be reported later in the meeting. If there is not a majority in a ballot, we will go to a second ballot later in the meeting."

c. Bishop David verified with the Secretary and the Technical Production team that the voting platform was ready. The Bishop announced the vote open, asking for selections to be made. After sufficient time, he announced the vote closed. He repeated the process for each office.

Results were announced after each ballot:

Standing Committee: (for One Lay–4-year term):

- Mr. Marshall Johnston PhD - St. James' Cathedral, Fresno - was elected with 31 votes (55.36%).
- Ms. Beth Elwood - St. John's, Lodi – received 25 votes (44.64%).

Standing Committee: (for One Clergy–4-year term):

- Rev. Brian Dawson - St. Paul's, Modesto - received 21 votes (37.5%).
- Rev. Luke Martinez - Church of the Saviour, Hanford - received 20 votes (35.71%).
- Rev. Deacon Marilee Munsey - St. Francis, Turlock - received 15 votes (26.79%).

No candidate received a majority. Election will go to a second ballot.

Diocesan Council: (At-Large Lay– 3-year):

- Mr. Joey Soria - St. John's, Lodi - was elected with 29 votes (50.88%).
- Mr. Joe Kieta - St. James' Cathedral, Fresno - received 28 votes (49.12%).

d. The Secretary announced that after consultation with the Chair, she invoked the resolution for tie-breaking and ranking Deputy elections since the slate does not have 9 candidates. She informed Convention that on the Deputy - Lay election those with vote should vote for up to 7 candidates – vote for 1 to 7 candidates, and on the Deputy – Clergy election those with vote should vote for up to 5 candidates – vote for 1 to 5 candidates.

Results were announced after each ballot:

Deputy to 82nd General Convention: (Lay 3-year with ranking):

• Dr. Skylar Carlson - St. John's, Stockton-was elected L1 with 51 votes (89.47%).
• Ms. Melissa Crider - COTS, Hanford-was elected L2 with 47 votes (82.46%).
• Ms. Cindy Smith - St. Paul's, Bakersfield-was elected L3 with 41 votes (71.93%).
• Ms. Candice Gale - St. John's, Lodi-was elected L4 with 40 votes (70.18%).
• Ms. Jan Dunlap - St. Paul's, Bakersfield-was elected LA1 with 39 votes (68.42%).
• Ms. Charlene Martin - St. John's, Lodi-was elected LA2 with 33 votes (57.89%).
• Ms. Frances Bott - St. John's, Lodi-received 23 votes (40.35%).
• Mr. Claude Muncey - St. Francis, Turlock-received 21 votes (36.84%).

Six were elected and ranked. Two did not receive a majority and will go to a second ballot.

Deputy to 82nd General Convention: (Clergy 3-year with ranking):

• The Rev. Betsy McElroy - St. John's, Lodi-was elected C1 with 47 votes (82.46%).
• The Rev. Luke Martinez - COTS, Hanford-was elected C2 with 45 votes (78.95%).
• The Rev. Brian Dawson - St. Paul's, Modesto-tied for C3 with 44 votes (77.19%).
• The Rev. Nelson Poveda - EDSJ Missioner-tied for C3 with 44 votes (77.19%).
• The Rev. Dcn. Cathy Kline - St Michael's, Ridgecrest-tied for CA1 with 37 votes (64.91%).
• The Rev. Cn. Anna Carmichael – EDSJ Canon-tied for CA1 with 37 votes (64.91%).

The first attempt was invalidated due to a faulty single vote restriction and was rerun.
All six were elected. In two cases of ranking, there was a tie which will go to a second ballot.

e. The Bishop announced that first balloting is now closed.

Convention paused for lunch at 12:05 p.m. - Convention resumed after lunch at 1:00 p.m.

16. VIDEO – ECCO: A YEAR IN REVIEW

a. Bishop David introduced the video, it was warmly received. The Bishop commented “This place feels like ‘ours’ ” with many voicing agreement.

17. ELECTION RESULTS OF FIRST BALLOT

Previously reported.

18. SECOND BALLOT VOTING

a. Bishop David called on the Secretary to review the second ballot which, by Canon, requires only a plurality (more votes) rather than a majority (50%+1). She reminded Convention that this ballot would be in four parts – Standing Committee -Clergy; Deputy to General Convention – Lay and two tie-breakers for Deputy to General Convention – Clergy.

Results were announced after each ballot:

Standing Committee: (for One Clergy–4-year term):

- Rev. Brian Dawson - St. Paul’s, Modesto – elected with received 27 votes (47.37%).
- Rev. Luke Martinez - Church of the Saviour, Hanford - received 17 votes (29.82%).
- Rev. Deacon Marilee Munsey - St. Francis, Turlock - received 13 votes (22.81%).

19. VIDEO – ANTI-RACISM COMMISSION

a. Bishop David introduced the video and thanked the members in their “good and holy work”.

SECOND BALLOT VOTING (resumes)

Results were announced after each ballot:

Deputy to 82nd General Convention: (Lay 3-year with ranking - Plurality – Ballot 2):

- Ms. Charlene Martin - St. John’s, Lodi-was elected LA2 with 49 votes (85.96%).
- Ms. Frances Bott - St. John’s, Lodi- was elected LA3 with 33 votes (57.89%).
- Mr. Claude Muncey - St. Francis, Turlock- was elected LA4 with 25 votes (43.86%).

Deputy to 82nd General Convention: (Clergy 3-year - C3 Tie Breaker- Ballot 2):

- The Rev. Nelson Poveda - EDSJ Missioner - C3 with 32 votes (57.14%).
- The Rev. Brian Dawson - St. Paul’s, Modesto - C4 with 24 votes (42.86%).

Deputy to 82nd General Convention: (Clergy 3-year - CA1 Tie Breaker- Ballot 2):

- The Rev. Cn. Anna Carmichael – EDSJ Canon - CA1 with 34 votes (60.71%).
- The Rev. Dcn. Cathy Kline - St Michael’s, Ridgecrest- CA2 with 22 votes (39.29%).

The Secretary then stated, “All offices have been filled. I ask the Chair to declare elections closed.” The Bishop replied, “Elections are now closed.”

20. VIDEO – SJ RAISE IMMIGRATION COMMISSION

a. Bishop David introduced the video. At the conclusion, The Bishop observed that the work of SJ RAISE has not slowed down one bit which all agree is unfortunate.

21. REPORT FROM THE CHAIR OF THE COMMITTEE ON RESOLUTIONS

a. The Bishop, recognized Mr. Michael Glass, Chair of the Committee on Resolutions. Chancellor Glass reported there are no resolution submitted.

22. ADMISSION OF LATE RESOLUTIONS FROM THE FLOOR

a. The Bishop asked the Secretary of Convention if any Late Resolutions were submitted electronically or from the floor. The Secretary reported none were submitted.

23. VIDEO – CREATION CARE COMMISSION

a. Bishop David introduced the video, which described the “Roadshow” touring the Diocese with the theme of “Reduce…”.

24. THIRD BALLOT VOTING - (not needed)

25. REPORTS BY TITLE

a. Bishop David acknowledged receipt of the following reports as made available to the Convention in the ECB/Electronic Convention Booklet [pages 86-111], and asked delegates to refer to these reports. He called for any additions, corrections, or questions from the floor as he listed each report.

- Report of the Standing Committee, The Rev. Suzy Ward, President) (pages 86-87)
- Report of the Diocesan Council (Ms. Jan Dunlap, Vice President) (pages 88-89)
- Report of the Commission on Ministry (Dr. Nancy Silva & Dr. Barbara Vassell, Co-Chairs) (pages 90-91)
- Report of the ECCO Commission (Ms. Joanne Kovac-Roberts and Mr. Mike Roberts, ECCO Co-Directors) (pages 92-95)
- Report of the Audit Review Committee – Congregational Management Review (The Rev. Dcn. Teri Van Huss, Chair, Ms. Josefina Powe, The Rev. Canon Anna Carmichael) (page 96)
- Building & Grounds Grants – (The Rev. Dcn. Teri VanHuss, The Rev. Dcn. Greg Masztal, The Rev. Cn. Anna Carmichael (page 97)
- Report of the Latino Missioner (The Rev. Nelson Serrano Poveda) (pages 98-99)
- Report of the Canon to the Ordinary (The Rev. Canon Anna Carmichael PhD) (pages 100)
- Report of SJRAISE Immigration Commission (Mr. Jonathan Partridge & The Rev. Dcn. Cathy Kline, Co-Chairs) (pages 101-102)
- Report of the Anti-Racism Commission (The Rev. Dcn. Steve Bentley, Dr. Barbara Vassell & The Rev. Canon Anna Carmichael, Co-chairs) (pages 103-105)
- Report of the Creation Care Commission (The Rev. Dcn Teri Van Huss, Chair) (pages 106-111)

b. No questions or corrections were received. Bishop David thanked the committees for all their work. Cn. Anna Carmichael pointed out that in reference to the Audits, all congregations should be applauded, as all audits were not only completed, but completed on time!

c. Bishop David called upon the Dispatch of Business to make a motion to receive the reports.

d. The Rev. Gail Bernthal moved that the Convention accept these reports as received from the named committees and commissions and enter them into the minutes of the 66th Annual Convention.

e. Deacon Terry March, St. Paul's, Visalia seconded.

f. Bishop David called for any further discussion, hearing none, he called for a Yes/No voice vote. Motion carried.

26. THIRD BALLOT RESULTS - (not needed)

27. RESOLUTIONS OF COURTESY

a. Bishop David called upon The Rev. Gail Bernthal, Dispatch of Business, to present the Resolutions of Courtesy.

b. The Rev. Gail Bernthal read each resolution to Convention. (see Exhibit section for Resolutions of Courtesy text).

c. The Rev. Gail Bernthal moved to accept the Resolutions of Courtesy and enter them into the minutes of the 65th Convention. Bishop David called for and received a second from Ms. Anna Pendergrass, St. Paul's, Visalia. Bishop David called for discussion; hearing none, called for a Yes/No voice vote to accept the Resolutions of Courtesy. Motion carried to applause for Rev. Gail's beautiful and moving words.

28. APPROVAL OF MINUTES OF THE 65th ANNUAL DIOCESAN CONVENTION OF 2024 & THE SPECIAL MEETING OF CONVENTION TO ELECT A BISHOP 2025

a. Bishop David asked the delegates to refer to the Minutes of the 65th Annual Diocesan Convention of 2024 in their ECB/Electronic Convention Booklet on pages 116 through 134 and asked for a motion to approve the Minutes of the Annual Convention of the Diocese of San Joaquin, held on November 9, 2024 as printed.

b. Ms. Kim Odenweller, St. Anne's, Stockton moved to approve the minutes as printed; seconded by The Rev. Nelson Serrano Poveda, Diocesan Missioner.

c. Bishop David called for discussion or corrections; hearing none, called for a Yes/No voice vote. Motion carried.

d. Bishop David asked the delegates to refer to the Minutes of the Special Meeting of Convention to Elect the Sixth Bishop of San Joaquin, held on October 18, 2025 in their ECB/Electronic Convention Booklet on pages 135 through 142 and asked for a motion to approve those Minutes as printed.

e. Mr. Michael Cava, St. Paul's, Bakersfield moved to approve the minutes as printed; seconded by Ms. Anna Pendergrass, St. Paul's, Visalia.

f. Bishop David called for discussion or corrections; hearing none, called for a Yes/No voice vote. Motion carried.

29. CERTIFICATION OF 2025 MINUTES OF CONVENTION

a. Bishop David called upon the Secretary to certify the minutes of the current proceedings.

b. The Secretary reported, “I certify that the proceedings of this convention have been adequately recorded to produce a reliable and accurate record of the business meeting of this 66th Annual Convention of the Diocese of San Joaquin, November 8, 2025.”

30. ANNOUNCEMENT OF ORGANIZATIONAL MEETINGS

a. Bishop David announced organizational meetings for ALL members (including both incoming and outgoing) of Diocesan Council and Standing Committee to follow the Convention business meeting.

31. MOTION TO SET DATE AND LOCATION OF THE 67th ANNUAL CONVENTION

a. Bishop David explained to the assembly: “Per Diocese of San Joaquin Constitution Article 5. Section 2, Annual Convention shall commence at a place and on a date set by resolution of the previous Annual Convention between October 1st and November 15th. I propose the date of the 67th Annual Convention be November 6th – 7th, 2026 at ECCO.” The Rev. Dcn. Marilee Muncey, St. Francis, Turlock made the motion. Bishop David called for a second. The Rev. Dcn. Tom Hampson, St. Paul’s, Modesto seconded. Bishop David called for discussion, hearing none, called for a Yes/No voice vote. Motion carried.

32. ADJOURNMENT AND BLESSING

a. Bishop David offered thanks to the Convention and asked for a motion to adjourn the 66th Annual Convention of the Episcopal Diocese of San Joaquin, Mr. Michael Cava, St. Paul’s, Bakersfield moved to adjourn, seconded by The Rev. Dcn. Cathy Kline, St Michael’s, Ridgecrest. Bishop David called for a Yes/No voice vote to adjourn. Motion carried.

b. Bishop David adjourned the meeting, thanked Convention and invited those gathered to stand, if able, for a closing blessing.

c. Meeting was adjourned at 1:56 p.m.

Respectfully submitted,

Ms. Cindy J. Smith, Secretary of Convention

EXHIBITS
CONSENT AGENDA ITEMS
RESOLUTIONS OF COURTESY

CONSENT AGENDA ITEMS

Required Vote: Simple Majority

Please Note: Items listed under the Consent Agenda are considered routine or otherwise. Each item will be read individually into the record of Convention, and the Consent Agenda will then be enacted as a whole by one motion and one roll call. There will be no separate discussion of these items. If discussion and separate discussion by Convention is desired on any Consent Agenda item, any Delegate may request to remove that item, and such item will be removed from the Consent Agenda by the Chair of Convention and considered in its normal sequence under the Regular Order of Business.

RESOLUTION TO GRANT SEAT AND VOICE
Resolved, that as a courtesy, clergy who are currently licensed in this Diocese, all lay members of Standing Committee and Diocesan Council who are not delegates, lay members of the Commission on Ministry, and lay deputies to General Convention, representatives of Church of the Resurrection in Merced, an unorganized mission, and all clergy and lay persons registered with the Credentials Committee as official observers to this 65th Annual Convention, all be granted seat and voice at this Annual Convention of the Episcopal Diocese of San Joaquin, meeting at ECCO, November 8, 2025.

RESOLUTION TO LIMIT DEBATE
Resolved, that in order to provide adequate voice to as many officers, delegates, and official observers of the Convention as possible, debate on any item of the agenda shall be limited to two (2) minutes per person. Convention Delegates may give of their time to another, but no single individual may exceed five minutes on any one motion. As a matter of courtesy, motions to “Call the question” or “Call the previous question” is out of order as long as one or more delegates have been acknowledged by the moderator are in the queue awaiting a turn to speak, unless there have been already five persons speaking for and/or against the issue.

RESOLUTION ON DISPATCH OF BUSINESS
Resolved, that the Chair of Convention and the Committee on the Dispatch of Business are permitted flexibility in presenting and re-ordering the agenda in order to expedite the business of convention.

RESOLUTION TO WAIVE READING OF RESOLUTIONS
Resolved, that in the interest of expediting the business of the Convention, the reading of those Resolutions submitted prior to convention and available to delegates and voting clergy in the Convention Booklet will be waived

RESOLUTION TO USE ELECTRONIC BALLOT
Resolved, that in accordance with Diocesan Canon 7.08, election ballots shall be electronic and administered by the VPOLL online voting platform, consistent with the Diocesan Canons and at the direction of the tellers.

RESOLUTION TO CHANGE REQUIRED VOTES FOR TIE-BREAKING AND RANKING
Resolved, that in accordance with Diocesan Canon 7.08, the Secretary of the Convention, in consultation with the Chair of Convention, may reduce the number of votes to be cast for each election by one vote less than the number of candidates seeking election to resolve a tie vote on a previous ballot or in order to otherwise determine the ranking of Deputies to General Convention.

RESOLUTIONS OF COURTESY

Whereas we are thankful to Jesus for His love, and for gathering us here at ECCO, our second home for fellowship and to do the work of the Church, and;

Whereas, under Bishop David's leadership we have discovered that we are Called to Be…many things to the world:

We are Called to Be: In Community
We are Called to Be: The Way of Love
We are Called to Be: Travelers on the Road
We are Called to Be: A Community on the Go
We are Called to Be: A Community Called to Turn
We are Called to Be: In Holy Transition

and this year we focus on being "Called to Be…A Community On the Ready", (Mt 24:44) as we respond to Jesus' call to stay awake and be ready for whatever Jesus asks of us, and;

Whereas, our time together would not have been possible without the selfless offering of time and talent by so many, therefore be it;

RESOLVED, that we give thanks to Cindy Smith, Jan Dunlap, Joanne Kovac-Roberts, Mike Roberts, Sadie Beling, Michael Glass, Padre Nelson Serrano-Poveda, Canon Anna Carmichael and Bishop David, who served as the Convention Planning Committee, for their faithfulness to our diocese, and for the care that went into making this convention one of prayer, communion and delight and be it further;

RESOLVED, that we wish to express our appreciation to Joanne Kovac-Roberts, Mike Roberts, Sadie Beling, and all the ECCO staff for welcoming us warmly to ECCO, and for their generous hospitality, and be it further;

RESOLVED, that we offer heartfelt thanks to Mr. Chuck Shaeffer of St. Paul's, Modesto, our faithful Convention Musician. We thank you for planning our worship music again this year, and for bringing us together in song, that we might join the angels and the saints in offering our musical praises to God, and,

Whereas, Bishop David announced his intent to retire in March 2026, and;

Whereas, it became necessary to prepare for, and hold, an election for the Sixth Bishop of the Diocese of San Joaquin, and;

Whereas, without the selfless and extensive efforts of numerous people, both within the diocese and without, the election could not have been successfully accomplished, therefore be it;

RESOLVED, that the diocese extends its gratitude to those who offered themselves as candidates for the ministry of Bishop of the Diocese of San Joaquin, particularly the final nominees, The Rev. Canon Anna Carmichael, Ph.D., The Rev. Rob Keim, The Rev. Canon Shawn Wamsley, as well as congratulations to the Rev. Dr. Gregory Kimura, Bishop Elect, and be it further;

RESOLVED, that we express our thanks to the Most Rev. Sean Rowe, Presiding Bishop, and his staff for their guidance in bringing the election to fruition, and be it further;

RESOLVED, that we offer thanks to the faith communities who hosted Meet and Greets, and Sunday morning worship with the candidates to provide the people of our diocese the opportunity to better know the candidates and prepare to vote, including St. Paul's, Bakersfield, St. James Cathedral, Fresno, St. Paul's Modesto, St. John's, Lodi, and St. Anne's, Stockton, and be it further;

RESOLVED, we extend our deep gratitude to the members of the Nominations Committee who so generously gave of their time and talent to make the search process a prayerful time of discernment;

-The Rev. Suzy Ward, St. Paul's, Visalia
-The Rev. Toni Alvarez
-The Rev. Rebecca Blair, St. Anne's, Stockton
-Melissa Crider, Church of the Saviour, Hanford
-Linda Masztal, St. Paul's, Modesto
-The Rev. Betsy McElroy, St. John's, Lodi
-Jonathan Partridge, St. John's, Stockton
-Cindy Smith, St. Paul's, Bakersfield
-Martin Brown, St. Paul's, Bakersfield
-Marshall Johnston, St. James Cathedral, Fresno
-The Rev. Deacon Cathy Kline, St. Michael's, Ridgecrest
-The Rev. Luke Martinez, Church of the Saviour, Hanford
-The Rev. Lyn Morlan
-Tamzin Wheatley, Church of the Saviour, Hanford
-The Rev. Deacon Carolyn Woodall, St. Anne's, Stockton, and be it further;

RESOLVED, we give special thanks to the Rev. Suzy Ward of St. Paul's Visalia, President of the Standing Committee, for faithfully and prayerfully leading the search process, to The Rev. Canon Brian Nordwick, our search consultant, and to Chancellor Michael Glass for his guidance and support. We are grateful for their wisdom and leadership. And be it further;

RESOLVED, that we are appreciative for the time and talents of the following people whose terms of service have come to a close, for their devotion and care of the people of our diocese;
Standing Committee - The Rev. Suzy Ward, St. Paul's Visalia, and Jonathan Partridge, St. John's, Stockton
Diocesan Council - The Rev. Deacon Terry March, St. Paul's Visalia, and Stephanie Gilmer, St. Paul's Modesto
Commission on Ministry - Dr. Barbara Vassell, St. Paul's Modesto, Candice Gale, St. John's Lodi, and Patricia Pallares, St. Michael's Ridgecrest
SJ Raise - Emily Burnias will step down as co-chair. New co-chairs are Jonathan Partridge and The Rev. Deacon Cathy Kline.
Anti-Racism Commission - Returning co-chairs are Dr. Barbara Vassell and The Rev. Deacon Steve Bentley, and be it further;

RESOLVED, that we give thanks for The Rev. Deacon Teri Van Huss who will retire from ordained diaconal ministry after eleven years in EDSJ. We are grateful for her spirit filled presence and for the gifts she shared. The people of St. John's Tulare, the children of St. John's Children's Learning Center, and the diocese as a whole will miss her. She and her daughter are examples of Jesus' love in action and they have been a blessing. We will carry their love in our hearts; and be it further;

RESOLVED, that we are grateful for the ongoing ministry of our Chancellor, Michael Glass, who walks with us and hopes with us and guides us as we continue to discern who we are Called to Be, ready to do the work of Jesus in the world. We are thankful for his guidance and his care, and be it further;

RESOLVED, that we give thanks for our Latino Missioner Padre Nelson Serrano-Poveda, as he brings the joy of Señor JesuCristo to our Latino neighbors (and to all God's people)…as he ministers wherever he is needed, from the agricultural fields …to the churches he is planting and nurturing up and down our valley; and be it further;

RESOLVED, that we give our heartfelt gratitude to Canon Anna Carmichael for her many years of devoted ministry with us. We are thankful for her example as she lives into our baptismal promise to strive for justice and peace among all people, respecting the dignity of every human being. We give thanks for her tireless devotion, her guidance, and the trust she shows in us as we join Jesus in doing holy work in the church and in the world, and be it further;

RESOLVED, that we offer our deep gratitude to our chief pastor, Bishop David, as he leads his twelfth and final Diocesan Convention here in EDSJ. God called him to this place almost twelve years ago, not only from another continent, but from another hemisphere. To that place he will soon return, but we are forever changed for his having been here, and he will live on in our hearts. We give thanks for the healing he brought, for his teachings about meeting and joining God in what God is doing in the world, and about being Jesus to those who are marginalized, and excluded. He has helped us become…"A Community on the Ready"…focused on loving each other…and on whatever else Jesus asks of us in this place we call EDSJ. We wish him, Tracy, and all his family God's abundant blessings, wherever they go, and we assure them that we carry them in our hearts.