**The name of this MS Word file is 2025\_Assessment\_Adjust\_Blank.docx**

**It can be found on the Diocesan website where it is located at https://www.diomass.org/inside/docs/assessments.**

**Application for Assessment Adjustment 2025**

**for**

type your church's name in this space

**in**

type your church's city or town in this space

**Request Summary**

Current 2025 Assessment: type in this space

Requested 2025Adjustment: type in this space

Date of Application: type in this space

**Primary Contact**

Name: type in this space

Email: type in this space

Daytime Phone: type in this space

**Your Assessment Coordinating Committee**

**AssessCoCom@Diomass.org**

|  |  |
| --- | --- |
| Ms. Connie Melahoures, Chair | Ms. Diane Grondin |
| The Rev. David Prentice | Mr. Edward Rewolinski | Ms. Lynn Smith |

**May 2024**

**The Diocesan Council** has charged the **Assessment Coordinating Committee** with reviewing and recommending adjustment to assessments of congregations facing financial challenges, either opportunities or hardships, which the congregation anticipates will result in difficulty in meeting its 2025 diocesan assessment.

This document is your congregation's Application Form for the 2025 adjustments. A copy of this Application Form **can be downloaded from the** Diocesan webpage[**www.diomass.org/inside/docs/assessments**](http://www.diomass.org/inside/docs/assessments)**.**

To be considered for 2025 assessment relief based on opportunities or challenges, the Assessment Coordinating Committee asks you to follow these steps:

1. **Save the entire downloaded document to your computer. Complete this Application Form by typing directly into the document at the locations designated in YELLOW HIGHLIGHTS.** Please complete the required information on the cover sheet of this form, as well.

 Note that the designated areas of the current form will expand to accept your text. You will have full use of grammar, punctuation, and spell check capabilities of a MSWord Document in the highlighted area only.

1. **Create an email attaching the following nine (9) documents:**

✓All pages of the completed the Assessment Adjustment Application Form.

✓2022 Statements of Financial Activity (Actual Income and Expenses) including the annual 2022 Budget,

✓2023 Statements of Financial Activity (Actual Income and Expenses) including the annual 2023 Budget,

✓2024 Year-to-Date Statements of Financial Activity (Actual Income and Expenses)

✓2024 Budget from the congregation’s most recent Annual Meeting

✓Statement of Financial Position (Balance Sheet) December 31, 2022

✓Statement of Financial Position (Balance Sheet) December 31, 2023

✓Statement of Financial Position (Balance Sheet) as of March 31, 2024

🗸The congregation's 2023 Parochial Report

**3. Send the email described in Step 2 to the Assessment Coordinating Committee’s** **email address:** AssessCoCom@diomass.org **with the subject line, “ACC: *your church's city or town*, *your church's name*”.**

**GLAD YOU ASKED:**

**Should my congregation apply for assessment consideration?**

The Assessment Coordinating Committee exists to assist your congregation. Please contact the committee at AssessCoCcom@Diomass.org, if you wish to discuss opportunities and processes for congregations to seek assessment consideration. A member of the committee will contact you to describe the committee's requirements and processes, as well as to address your congregation's comments and concerns.

**If my congregation has decided to apply for assessment relief, how do we apply**?

This document, 2025\_Assessment\_Adjust\_Blank.docx, contains the application form for assessment adjustments, which can be found on the following pages.

The general directions for completing the application can be found on the preceding page.

**How should a congregation begin the application process?**

You will need to gather your financial documents from 2022 and 2023 along with your 2024 YTD information. A copy of your 2022 and 2023 Parochial Report as filed will be required. To address the Narratives in the application you will wish to consult with parish leadership to identify the causes of your hardship or benefits of the opportunities. in addition to the assessment relief request, you are asked to statethe actions is your congregation is taking to relieve the distress or what benefits will the opportunities afford the organization to relieve this financial stress? With this material in hand and these considerations understood, you are prepared to complete the application.

In addition to identifying hardships or opportunities, if you have found during this process that there are errors in your 2023 Parochial Report, you are welcome to apply for a Parochial Report Correction using the form found at 2023\_Parochial\_Report\_Correct\_Blank.xlsx, which is located at [www.diomass.org/inside/docs/assessments](https://www.diomass.org/inside/docs/assessments) or by contacting the committee directly at AssessCoCom@Diomass.org

**What is the timeframe how of the Assessment Adjustment Process?**

After determining you wish to apply, begin the application. If questions arise, you are encouraged to contact the Assessment Coordinating Committee. When you have completed your application, email the complete packet to AssessCoCom@Diomass.org. The committee will verify reception of your application within 6 business days. The committee will inform you of when the next committee meeting is scheduled and when the Assessment Coordinating Committee brings its recommendations to Diocesan Council. As the governing body, Council, informed by the committee's recommendation, votes on the reduction. Within 2 business days of that vote, you will receive notice of your new assessment.

**Quick-Start Guide**

1. Download this file (your application) to your computer before beginning the application process
2. If you have questions on the application or on your church’s eligibility, contact the Assessment Coordinating Committee at AssessCoCom@Diomass.org. The Assessment Coordinating Committee exists to assist your congregation.
3. Complete this application, including the cover sheet. Save, and return the entire packet (9 attachments) to AssessCoCom@Diomass.org. There is no need to remove pages containing directions, etc.

**SECTION A: Short Answers (five items in this section)**

1. Please identify your congregation including city or town (type here, it will expand)\_\_\_\_\_\_\_
2. CONTACTS: Please identify two principal contacts for this application.

|  |  |  |  |
| --- | --- | --- | --- |
| **Congregational Leaders** | **Name** | **Preferred Email Address** | **Daytime Phone** |
| **Contact** | (type here) | type here) ( | (type here) |
| **Contact** | (type here) | (type here) | (type here) |

3.) Your congregation’s assessment for 2025 as mailed to you in May 2024 is $(type here) \_\_

4.) The amount of the adjusted assessment that your congregation suggests is reasonable for 2025, in light of the narratives you will complete in Section B of this document, is $(type here)\_

5.) ADJUSTMENT HISTORY. Please complete the summary of your recent assessment and adjustment history:

|  |  |  |  |
| --- | --- | --- | --- |
| **Assessment****Year** | **Amount of Assessment for the given year** | **Does the amount in the column to the left reflect an adjustment? (Yes/No)****If yes, what was the amount of that adjustment?** | **was the reason for the correction for each year: "hardship/opportunity" *or* "Parochial Report correction" *or* "both"?** |
| **2022** | $(type here) | (type here) If Yes, $(type here) | (type here) |
| **2023** | $(type here) | (type here) If Yes, $(type here) | (type here) |
| **2024** | $(type here) | (type here) If Yes. $(type here) | (type here) |
| **2025** | $(type here) | NA | NA |

5a.)[[1]](#footnote-1) Is your congregation applying for a correction to your 2023 Parochial Report in addition to this adjustment? (Yes/No) (type here)

**Section B: TWO Narratives to be completed by s for Assessment Adjustments**

**Attention: *If your vestry determines that either or both of your narrative responses require information of a confidential nature, please contact the committee for a conversation before including such material in your application. The committee always welcomes your questions and comments.***

**Narrative 1.** Please describe the reasons that your congregation is seeking an assessment adjustment for 2025. Please include in your description the following:

1. The details of the current financial challenges/opportunities, including how these issues contribute to the nature of your adjustment request for the 2025 Assessment,
2. An explanation of your congregation’s considerations in arriving at the amount of this request,
3. The impact on your congregation if less than the requested adjustment amount is granted.

***This space will expand to accept your detailed response!*** (type here)***\_\_***

*(The above space will accommodate both “copy and paste “from other docs as well as typing directly into the space provided.)*

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Narrative 2.** Describe your congregation’s plans to address the current challenges or describe the opportunity and its intended benefits to your congregation in 2025 and beyond.

Please include in your description the following:

1. Actions your congregation have/will adopt to address the current stresses,
2. Assistance your congregation has already received in planning those actions, including diocesan resources such as: support from your regional canon, diocesan staff, congregational consultants, development or study grants, Is such support consulting support on-going?
3. Description of the role this Assessment Adjustment can play in the congregation’s overall planning and strategy.

***This space will expand to accept your detailed response!*** (type here) ***\_\_***

*(The above space will accommodate both “copy and paste “from other docs as well as typing directly into the space provided.)*

|  |
| --- |
| Your Regional Canon is (type here) |
|  |
| Your Congregational Consultant contact information, if applicable |
| **Name** | **Email Address** | **Phone (optional)** |
| (type here) | (type here) | (type here) |

**Section C. COMPLETING THE PROCESS**

**1.)**

**When you have entered all the required information into the designated sections of this application form: tables, short-answers, and both Narratives, save this entire document. Recall, there is no need to remove pages or reformat this document before submitting. A uniform format helps our committee in its review!**

**2.)**

**Please attach the following documents to your application email.**

**Most Recent Financial Statements, Parochial Report, and the application form:**

✓The completed “Application for 2025 Assessment” (this document),

✓2022 Statements of Financial Activity (Actual Income and Expenses) and annual 2022 Budget, ✓2023 Statements of Financial Activity (Actual Income and Expenses) and annual 2023 Budget

✓2024 Year-to-Date Financial Activity (Actual Income and Expenses),

🗸2024 Budget as presented at your January 2024 Annual Meeting,

✓Statement of Financial Position (Balance Sheet) December 31, 2022,

✓Statement of Financial Position (Balance Sheet) December 31, 2023,

✓Statement of Financial Position (Balance Sheet) March 31, 2024,

🗸2023 Parochial Report.

**3.)**

**Email this saved, completed application along with the other eight required, support documents as attachments to:**

**AssessCoCom@Diomass.org**

**with subject line, “ACC: your church's city or town, your church's name”**

***Thank you for assisting our committee in this important process,***

***Your Assessment Coordinating Committee***

1. Congregations are welcome to request both an adjustment and a correction should they find both apply. For Parochial Report corrections, please refer to the application packet 2**023\_Parochial\_Report\_Correct\_Blank.xls, which can be download from the** Diocesan website at[**www.diomass.org/inside/docs/assessments**](http://www.diomass.org/inside/docs/assessments). [↑](#footnote-ref-1)