



Episcopal Diocese of Bethlehem

2023 Application for Assessment Adjustment

Parish:	Town/City:
Contact Person:	
Phone:	E-mail:
Date approved by Vestry:	
Signatures	
Clergy:	E-mail:
Warden:	E-mail:
Treasurer:	E-mail:

SUMMARY INFORMATION

Amount of Assessment that the parish expects to be able to pay in 2023 \$ _____

Assessment paid in 2022 \$ _____ Assessment paid in 2021 \$ _____

Average Sunday Attendance 2020 _____ 2021 _____ 2022 _____

Pledge Income 2020 \$ _____ 2021 \$ _____ 2022 \$ _____

Average Pledge 2020\$ _____ 2021 \$ _____ 2022 \$ _____

Plate Income 2020 \$ _____ 2021 \$ _____ 2022 \$ _____

Other Income 2020 \$ _____ 2021 \$ _____ 2022 \$ _____

Payroll Protection Program Loan 2021 \$ _____ Forgiven \$ _____

Total 2023 Operating Revenue (projected) \$ _____

2023 Pledge Revenue (projected) \$ _____

2023 Plate Revenue (projected) \$ _____

2023 Other Revenue (projected) \$ _____

Total 2023 Operating Expenses (budgeted) \$ _____

Total liquid assets, all accounts (checking, savings, money market, certificates of deposit, etc.)

\$ _____

Total Invested funds \$ _____ Amount Restricted \$ _____

Summarize Restrictions _____

Clergy Compensation (Salary, housing, SECA) 2021 \$ _____ 2022 \$ _____

2023 (budgeted) \$ _____ for – ___ Full Time ___ 3/4 ___ 1/2 ___ 1/4 ___ Other (check one)

Total salaries, other paid staff _____

Date of most recent audit or financial review: _____

WRITTEN RESPONSES

The foundation of Assessment is rooted in a spirit of mutual ministry together as parishes in the diocese. In your written responses and your presentation with the Mission Resources Committee, please be sure to provide an awareness that as you request an adjustment, you are not simply asking for support of the Bishop, but of every other parish that make up the diocese with you. Please provide responses to the following questions as an attachment to this application.

1. What circumstances or challenges prevent you from paying your current Assessment in full?
2. How are you pursuing mission/ministry partnerships?
3. What is your plan to achieve self-sufficiency to prevent having to apply for Assessment Adjustment next year?
4. If you received a Payroll Protection Program loan, please provide the date of loan, amount of loan, and forgiveness status.

ADDITIONAL FINANCIAL INFORMATION

Also, please attach the following documents as attachments to this application.

1. Your most recent revenue and expense report.
2. Your most recent balance sheet.
3. Your parish budget for the current year.
4. Annual reports for previous three years.

This Assessment Adjustment application will be reviewed with you at a Mission Resources Committee online meeting. In addition to completing this application, please prepare a short presentation (less than 10 minutes) that highlights the causes of your current financial situation, describes what you have tried that has not worked and what has worked in your ministry, and describing what you are planning to do differently in the future.