



## Episcopal Diocese of Bethlehem

### 2024 Application for Assessment Adjustment

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

#### SUMMARY INFORMATION

Amount of Assessment that the parish expects to be able to pay in 2024 \$ \_\_\_\_\_  
 Assessment paid in 2023 \$ \_\_\_\_\_ Assessment paid in 2022 \$ \_\_\_\_\_

Average Sunday Attendance 2021 \_\_\_\_\_ 2022 \_\_\_\_\_ 2023 \_\_\_\_\_

Pledge Income 2021 \$ \_\_\_\_\_ 2022 \$ \_\_\_\_\_ 2023 \$ \_\_\_\_\_  
 Average Pledge 2021 \$ \_\_\_\_\_ 2022 \$ \_\_\_\_\_ 2023 \$ \_\_\_\_\_

Plate Income 2021 \$ \_\_\_\_\_ 2022 \$ \_\_\_\_\_ 2023 \$ \_\_\_\_\_

Other Income 2021 \$ \_\_\_\_\_ 2022 \$ \_\_\_\_\_ 2023 \$ \_\_\_\_\_

Payroll Protection Program Loan 2022 \$ \_\_\_\_\_ Forgiven \$ \_\_\_\_\_

Total 2024 Operating Revenue (projected) \$ \_\_\_\_\_  
     2024 Pledge Revenue (projected) \$ \_\_\_\_\_  
     2024 Plate Revenue (projected) \$ \_\_\_\_\_  
     2024 Other Revenue (projected) \$ \_\_\_\_\_

Total 2024 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) 2022 \$ \_\_\_\_\_ 2023 \$ \_\_\_\_\_  
2024 (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: \_\_\_\_\_

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## **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.