**Assessment Adjustment Applications** are requests for assistance from congregations facing financial challenges, either opportunities or hardships, which will result in undue difficulty in meeting the 2022 diocesan assessment--The Application Form, **Assessment Adjustment Document\_Blank.doc,** is located on the Diocesan website as at**[www.diomass.org/inside/docs/assessments](https://www.diomass.org/inside/docs/assessments).***A Reference Document for the 2022 Assessment Coordination Process.doc,* found at the same webpage, provides background hints for the application below,[**The Application for Adjustments to Your Assessment**](#APPENDIXII)**.**

**When you complete entering your information into the designated sections of this application please**

* **Save the entire MS Word Document and complete the form**
* **Email the saved, completed application along with all required support documents as attachments to:**

[**AssessCoCom@Diomass.org**](mailto:AssessCoCom@Diomass.org) **subject line, “ACC: Church Name, Church Town/City”**

**For Questions:**

* Please email all general comments and inquiries concerning the Assessment Adjustment Application and its processes to: [**AssessCoCom@Diomass.org**](mailto:AssessCoCom@Diomass.org) **subject line, “ACC: your church’s name, your town”**
* Your comments and inquiries concerning your 2019 Parochial Report should be emailed to:[**ParochialReports@Diomass.org**](mailto:ParochialReports@Diomass.org) **subject line, “PR: your church’s name, your town”**

Sincerely,

The Assessment Coordinating Committee

|  |  |  |
| --- | --- | --- |
| Ms. Connie Melahoures, Chair | Ms. Diane Grondin | Mr. Rob Kelleher |
| Mr. Edward Rewolinski | Ms. Lynn Smith | The Rev. Sarah Van Gulden |

**Quick Start Guide**

1. **Download this file (your application) to your computer before beginning the application process**
2. **Refer to** ***A Reference Document for the 2022 Assessment Coordination Process*** **found on the diocesan website at**[**www.diomass.org/inside/docs/assessments**](https://www.diomass.org/inside/docs/assessments) **for information on the application and process**
3. **Contact the Assessment Coordinating Committee with any questions or concerns about the application,** **emailing AssessCoCom@Diomass.org.**
4. **Consider completing the application for Assessment Adjustment if your congregation anticipates an undue hardship in meeting the assessment obligation. Complete this application, save, and return the entire packet to AssessCoCom@Diomass.org. (no need to remove pages containing directions, etc.)**

**If you find your 2019 Parochial Report is in error, apply for Parochial Report Adjustment. The application packet for that correction is located at Parochial Report Adjustment Worksheet\_Blank.xlsx on the diocesan website at**[**www.diomass.org/inside/docs/assessments**](https://www.diomass.org/inside/docs/assessments)**. Congregations may apply for both considerations.**

**Appendix I** **Checklist for the Applications**

**Material Required for Consideration by the Assessment Coordinating Committee**

Each congregation requesting adjustments to the computed 2022 Assessments will submit the following:

|  |  |  |  |
| --- | --- | --- | --- |
| Congregations may request either **ONE or BOTH** of  2019 Parochial Report Corrections andAssessment Adjustments | | | |
|  | | | |
| **2022 Assessment Adjustment requests because of financial challenges** | | | |
| **🗸** | **Material/Documents** | | **Adjustments Applicants complete the following** |
|  | The Application | * Assessment Adjustment Document\_Blank.doc at <https://www.diomass/inside/docs/asessments> | |
|  | Section A | * Church name and City/town, Contact information for Assessment Adjustment * Your assessment for 2022, * The amount of the adjustment you are requesting * Your church’s assessment history * Are you also applying to correct 2019 Parochial Report (allowed, submit both forms) | |
|  | Section B   * Narratives * Financial Statements | * Narrative addressing the situations that are the reasons for your application * Narrative describing the resolution and the role of the adjustment in the resolution * The name and contact information of the Diocesan Business Consultant, if applicable | |
|  | Financial Statements:   * 2019 Statements of Financial Activity, Actual Income and Expenses and Budget for 2019 * 2020 Actual itemized Income and Expenses and Budget for 2020 * 2021 Year-to-date, and your congregation's 2021 Budget passed at Annual Meeting | |
|  | * Statement of Financial Position on December 31, 2019 * Statement of Financial Position on December 31, 2020 * Identify significant changes in Financial Position since December 31, 2020 | |
|  | Completed Assessment Adjustment Application Document emailed with all required material to [AssessCoCom@Diomass.org](mailto:AssessCoCom@Diomass.org) with Subject line “ACC: Church Name, Church Town/City” | | |
|  | |  |  |  |  | | --- | --- | --- | --- | | |  | | --- | |  | | | | | **USES A SEPARATE APPLICATION**  **2019 Parochial Report Corrections affecting your 2022 Assessment** | | | | **Material/Documents** | **Who needs to supply this material?** | | The Application for 2019 Parochial Report Correction is located at:  Parochial Report Adjustment Worksheet\_Blank.xlsx found at [www.diomass.org/inside/docs/assessments](https://www.diomass.org/inside/docs/assessments) | * Congregations seeking correction to their 2019 Parochial Reports Congregations applying for both Parochial Report * Parochial Report Adjustment and Assessment Adjustment should complete both applications, mailing each to its designate email address. | | Please send completed correction application to [ParochialReports@Diomass.org](mailto:ParochialReports@Diomass.org) with the subject line “PR: Church Name, Church Town/City” | | | | |

**Appendix II:** **The Application** **for Adjustments to Your Assessment**

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|  |
| --- |
| **INSTRUCTIONS FOR COMPLETING THEASSESSMENT ADJUSTMENT FORM**  **To begin your application, please *download* this MS Word document:**  **(Assessment Adjustment Document\_Blank.doc ),** |
| **which you will find at** [**https://www.diomass.org/inside/docs/assessments**](https://www.diomass.org/inside/docs/assessments)  **The M**S **Word document y**ou are reading **contains two pages of general information followed by a form to fill in. The whole document locked except for areas lighted in yellow where you can type your responses [fill in]. The highlighted areas will accept your responses, including your narratives.**  **The application askes you to respond to two questions which require narratives. You may type directly or *cut-and-paste* your responses into the [fill in]. (It will accept your paragraphs and well as short answers.)**  **When you have completed the application save, the entire document. (Please leave all of the pages attached!)**  **Email the saved MS Word document and the required financial documents as attachments to AssessCoCom@Diomass.org with the subject line**  **"ACC: church's name, church's town/city"** |

**Please mail Completed Applications and all required supporting material to** [**AssessCoCom@Diomass.org**](mailto:AssessCoCom@Diomass.org)

**You may enter all your responses for the following tables and narratives at [fill in]. ,**

**Then save and email with your supporting documents**

**Section A: Background information**

**There are six items in this section.**

* 1. Congregational leadership information for Congregation Name and City/Town (fill in)
  2. Please identify two contacts

|  |  |  |  |
| --- | --- | --- | --- |
| **Congregational Leaders** | **Name** | **Preferred Email Address** | **Daytime Phone** |
| **Other contact** | (Fill in) | (Fill in) | Fill in) |
| **Other contact** | (Fill in) | (Fill in) | Fill in) |

\*\*Please identify the preferred contact(s) for the Assessment Coordinating Committee: (fill in) \_\_\_\_\_\_

* 1. Your congregation’s assessment for 2022 as mailed to you in May 2021 is $ (fill in) \_\_\_\_\_\_\_\_\_\_\_\_
  2. The amount of **Assessment** **Adjustment requested** by your congregation is $ (fill in) \_\_\_\_\_\_\_\_\_\_
  3. Please complete the summary of your recent assessment and adjustment history:

|  |  |  |  |
| --- | --- | --- | --- |
| **Year** | **Amount of Assessment for the given year** | **Does the amount of in the left column reflect an adjustment? (Y/N)**  **If yes, what was the amount of adjustment?** | **Was the adjustment for the given year the result of a revised Parochial Report? (Y/N)** |
| **2019** | (fill in) | (fill in) | (fill in) |
| **2020** | (fill in) | (fill in) | (fill in) |
| **2021** | (fill in) | (fill in) | (fill in) |
| **2022** | (fill in) | NA | NA |

* 1. Is Your congregation also applying for correction to you 2019 Parochial Report? Yes/No (fill in)\_\_

Recall, if you identify errors, you may apply for a Parochial Report Correction using

Parochial Report Adjustment Worksheet\_Blank.xlsx located at [www.diomass.org/inside/docs/assessments](https://www.diomass.org/inside/docs/assessments)

and submit that application to [ParochialReoprts@Diomass.org](mailto:ParochialReports@Diomass.org), with subject lime “PR: your Church Name, Church Town/City” at the same time you submit your request for Assessment Adjustment to [AssessCoCom@Diomass.org](mailto:AssessCoCom@Diomass.org) with the subject lime “ACC: your Church Name, Church Town/City”.

**Section B: Two Narratives and Six Financial Statements**

**completed by all applicants for Assessment Adjustment**

1. Describe the reasons that your congregation is seeking an assessment adjustment for 2022. 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 your 2022 Assessment
   2. An explanation of your congregation’s considerations in arriving at the amount of this request
   3. The impact on your congregation if receiving less than the requested adjustment.

***You may choose to attach as a separate document or type or “copy and paste” your Narrative #1 here:* (fill in)*\_\_***

1. Describe your congregation’s plans to address the current challenges.

Please include a description of the following:

* 1. actions your congregation have/will adopt to the address the current stresses

assistance your congregation has received in the planning those actions, especially diocesan resources such as your regional canon, staff support, congregational consultants.

* 1. Include a description of the role the Assessment Adjustment can play a in the congregation’s overall planning and strategy. Is the consulting support on-going?

***You may choose to attach as a separate document or type or “copy and paste” your Narrative #2 here:* (fill in)**

|  |  |  |
| --- | --- | --- |
| Please include your Congregational Consultant contact information, if applicable | | |
| **Name** | **Email Address** | **Phone (optional)** |
| (fill in) | (fill in) | (fill in) |

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

Six Recent Financial Statements:

* 2019 Statements of Financial Activity Actual Income and Expenses and Budget for 2019
* 2020 Statements of Financial Activity Actual Income and Expenses and Budget for 2020
* 2021 Year-to-date cash flow and 2021 Budget
* Statement of Financial Position (Balance Sheet) December 31, 2019
* Statement of Financial Position (Balance Sheet) December 31, 2020
* Statement of Financial Position (Balance Sheet) March 31,2021

**You may wish to refer to** [**Appendix I: Checklist for the Applications**](#APPENDIXONE) **(above) to be sure you have included all supporting documentation with your application.**

**When you complete entering your information into the designated sections of this application please**

* **Save the entire MS Words Document**

**There is no need to remove pages or reformat**

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

[**AssessCoCom@Diomass.org**](mailto:AssessCoCom@Diomass.org) **subject line, “ACC: Church Name, Church Town/City”**

**Thank you for your participation in this important process for our congregations,**

***Your Assessment Coordinating Committee***