Diocesan Assessment 2023 Adjustment Request Form
Form due: October 1, 2022

***Forms submitted after this date will not be considered. The priest or Senior Warden and treasurer or bookkeeper must be present to meet with Diocesan Council on November 12th, 2022 to discuss the request. See list of other requirements at the end of the form.***

Name of Church:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Tell us your story. What has led your church to this proposal for an alternative 2023 diocesan assessment amount?
2. Please list any extraordinary circumstances your church is facing.
3. What were your total pledges (in dollars) for 2022?
4. On the basis the pledges received to date, what would you most likely expect the final pledge amount to be for 2023?
5. Please describe the level of stewardship training and education in your church in 2022.
6. What are your stewardship plans for 2023?

Total assessment payments made through 9/30/2022:\_\_\_\_\_\_\_\_\_\_\_\_

Budgeted Diocesan Assessment for 2023: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Church’s Request for 2023:

We request to pay a flat amount of \_\_\_\_\_\_\_\_\_\_ per month

Other Request – please note here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Please include a copy of:*

*\_\_\_\_\_2023 Budget Draft*

*\_\_\_\_\_2022 Annual financial statements as of 9/30/22 (include balance sheet showing all assets and income statement showing income and expenses).*

*Please fill in the information in the table below:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | *2018* | *2019* | *2020* | *2021* | *9/30/2022* |
| *Total Revenue* |  |  |  |  |  |
| *Total Expenses* |  |  |  |  |  |
| *Total assessment paid* |  |  |  |  |  |
| *Number of Pledging units* |  |  |  |  |  |
| *Number of Donors* |  |  |  |  |  |

Please note: To be considered for an abatement for 2023, you church must meet all canonical and diocesan deadlines listed below.

Canonical and Diocesan Deadlines:

* + Vestry officers list- due February 15 – date submitted:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ Parochial report - due March 1 – date submitted:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ State of Montana annual incorporation report - due April 15 – date submitted:\_\_\_\_\_\_\_\_\_\_\_\_\_\_-
	+ Audit - due September 1 – date submitted:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ Licenses for Lay Eucharistic Visitors and Eucharistic Ministers up to date\_\_\_\_\_\_\_
	+ Safeguarding training and background checks up to date for treasurer and all who work with children. Please provide a list of those who work with children below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***If the abatement is granted, the 2022 audit for your church will be required to be performed by two diocesan audit team* members.**

Request approved by Vestry on: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Senior Warden:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Priest:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_

Council decision:

Approved\_\_\_\_\_ Denied\_\_\_\_\_ Pending\_\_\_\_\_\_\_