

Assessment Analysis

Please note: The following data is provided for comparison only. The values in the 2027 Assess (Current) are the numbers that will be used for the 2027 assessment calculations. For illustration purposes those numbers have been used in example only of what the values will look like "if" the new formula was in place. If approved, the new formula will be used to calculate the 2028 assessment.

										For Illustration purposes - Calculations and Comparisons using new formula.										
		2023 Parochial Report 2025 Assessment			2024 Parochial Repot 2026 Assessment			2025 Parochial Repot 2027 Assessment		2027 Using New Formula		Analysis								
		Parochial	2025		Parochial	2026		Parochial	2027	3 Year Rollng Avg/10%		Amount	Amount	Variance						
		Report	Assessment		Report	Assessment		Report	Assess (Current)	3 year Rolling	10% Rolling	Using Current	Using Proposed	Using New						
								Lines 3												
										Average - PR	Avg - Assess	Formula	Formula	Formula						
All Saints	P	\$324,965.00	\$32,757.85		\$308,040.00	\$36,033.64		\$307,514.00	\$28,726.85	\$313,506.33	\$31,350.63	\$28,726.85	\$31,350.63	\$2,623.78						
Ascension/St. Matthews	M	\$71,902.00	\$7,190.20		\$58,573.00	\$7,909.22		\$49,333.00	\$4,933.30	\$59,936.00	\$5,993.60	\$4,933.30	\$5,993.60	\$1,060.30						
Good Shepherd	P	\$201,147.00	\$16,364.73		\$197,595.00	\$18,001.20		\$193,374.00	\$19,034.13	\$197,372.00	\$19,737.20	\$19,034.13	\$19,737.20	\$703.07						
Grace	M	\$137,992.00	\$13,799.20		\$138,282.00	\$11,927.93		\$159,734.00	\$13,120.72	\$145,336.00	\$14,533.60	\$13,120.72	\$14,533.60	\$1,412.88						
Holy Spirit	M	\$5,918.00	\$117.10		\$9,714.00	\$129.37		\$4,013.00	\$142.31	\$6,548.33	\$654.83	\$142.31	\$654.83	\$512.52						
Resurrection	M	\$88,191.00	\$8,819.10		\$111,226.00	\$9,701.01		\$101,794.00	\$10,179.40	\$100,403.67	\$10,040.37	\$10,179.40	\$10,040.37	(\$139.03)						
Spirit of the Desert	P	\$43,854.00	\$2,466.63		\$47,490.00	\$2,713.29		\$0.00	\$0.00			\$0.00		\$0.00						
St. David	M	\$57,248.00	\$5,358.00		\$42,693.00	\$5,893.80		\$37,112.00	\$3,711.20	\$45,684.33	\$4,568.43	\$3,711.20	\$4,568.43	\$857.23						
St. Elizabeth	M	\$48,783.00	\$2,247.26		\$30,017.00	\$2,471.99		\$15,191.00	\$1,519.10	\$31,330.33	\$3,133.03	\$1,519.10	\$3,133.03	\$1,613.93						
St. Francis	M	\$65,771.00	\$6,573.27		\$53,387.00	\$6,577.10		\$95,030.00	\$7,234.81	\$71,396.00	\$7,139.60	\$7,234.81	\$7,139.60	(\$95.21)						
St. James	P	\$351,573.00	\$28,466.55		\$328,403.00	\$31,313.21		\$339,680.00	\$34,444.53	\$339,885.33	\$33,988.53	\$34,444.53	\$33,988.53	(\$456.00)						
St. John	M	\$222,669.00	\$12,647.53		\$201,266.00	\$13,912.28		\$209,051.00	\$15,303.51	\$210,995.33	\$21,099.53	\$15,303.51	\$21,099.53	\$5,796.02						
St. Jude	M	\$38,925.00	\$3,523.76		\$50,847.00	\$3,876.14		\$79,111.00	\$4,263.75	\$56,294.33	\$5,629.43	\$4,263.75	\$5,629.43	\$1,365.68						
St. Luke	P	\$386,327.00	\$38,972.54		\$394,508.00	\$42,869.79		\$421,434.00	\$47,156.77	\$400,756.33	\$40,075.63	\$47,156.77	\$40,075.63	(\$7,081.14)						
St. Mark	P	\$803,324.00	\$67,017.94		\$549,490.00	\$73,719.73		\$652,372.00	\$81,091.70	\$668,395.33	\$66,839.53	\$81,091.70	\$66,839.53	(\$14,252.17)						
St. Mary	M	\$68,176.00	\$6,050.85		\$70,549.00	\$6,655.94		\$89,272.00	\$7,321.53	\$75,999.00	\$7,599.90	\$7,321.53	\$7,599.90	\$278.37						
St. Michael	M	\$23,987.00	\$2,398.70		\$23,987.00	\$2,398.70		\$17,008.00	\$1,700.80	\$21,660.67	\$2,166.07	\$1,700.80	\$2,166.07	\$465.27						
St. Paul (s)	P	\$411,220.00	\$40,253.98		\$299,888.00	\$34,065.17		\$328,448.00	\$37,471.69	\$346,518.67	\$34,651.87	\$37,471.69	\$34,651.87	(\$2,819.82)						
St. Paul (v)	M	\$19,869.00	\$389.74		\$30,769.00	\$428.71		\$28,402.00	\$471.58	\$26,346.67	\$2,634.67	\$471.58	\$2,634.67	\$2,163.09						
St. Peter	M	\$17,193.00	\$1,719.30		\$12,998.00	\$1,891.23		\$12,089.00	\$1,208.90	\$14,093.33	\$1,409.33	\$1,208.90	\$1,409.33	\$200.43						
St. Stephen/San Esteban	M	\$79,234.00	\$7,587.90		\$58,414.00	\$8,346.69		\$43,454.00	\$4,345.40	\$60,367.33	\$6,036.73	\$4,345.40	\$6,036.73	\$1,691.33						
TOTAL ASSESSMENT AMOUNT			\$304,722.13					\$320,836.14				\$323,381.98		\$319,282.53		\$323,381.98		\$319,282.53		(\$4,099.45)

PLEASE NOTE: As your are reviewing this document, please note that the 2023 Parochial Report columns utilized Lines 3, 4, 5, and 6 from the Finance Page of the Annual Parochial Report. The 2024 number only factored Line #3 (Plate, pledge, and other contributions...). The result is that the number used in the calculations from the 2024 parochial report uses only one line as opposed to all 4 lines in the Revenue section of the repot. This does skew the results slightly for several churches. If you have questions about this, please do not hesitate to call Bill Potts, CFO, for clarification.

CURRENT Formula		
Status		Formula (beginning 1/1/10)
P	(Parish)	7% of operating income incl. Diocesan grant on 1st \$124,999
		10% of operating income incl. Diocesan grant on income \$125,000 - \$250,000
		13% of operating income incl. Diocesan grant on income > \$250,000
DP	(Developing Parish)	7% of operating income incl. Diocesan grant on 1st \$124,999
		10% of operating income incl. Diocesan grant on income \$125,000 - \$250,000
		13% of operating income incl. Diocesan grant on income > \$250,000
M	(Mission)	10% of operating income before Diocesan grant
Beginning 1/1/12, the assessment may not increase more than 10% over the prior year's assessment.		