

Assessment Analysis

(Using a flat 10% assessment percentage calculated on three year rolling average and no 10% cap.)

(Please note: The final section of columns below are provided for example only purposes and using the most recent available data - the 2026 numbers. If the new assessment calculation resolutions pass, both would not go into affect until the calculations for the 2027 numbers would begin - ie: the calculations would begin in 2026 to determine the numbers for the 2027 budget year. The 2026 assessment numbers have already been calculated and sent - see column below.)

		2022		2023		2024 <small>(used Parochial Report Line 3 of Fin. Page)</small>		3 Year Rolling Average		Analysis			
		Parochial	2024	Parochial	2025	Parochial	2026	3 year Rolling	10% Rolling	Amount	Amount	Variance	
		Report	Assessment	Report	Assessment	Report	Assessment	Average - PR	Avg - Assess	Using Current	Using Proposed	Using New	
										Formula	Formula	Formula	
All Saints	P	\$297,023.00	\$29,779.86	\$324,965.00	\$32,757.85	\$308,040.00	\$36,033.64	\$310,009.33	\$31,000.93	\$36,033.64	\$31,000.93	(\$5,032.71)	
Ascension/St. Matthews	M	\$75,460.00	\$7,139.36	\$71,902.00	\$7,190.20	\$58,573.00	\$5,857.30	\$68,645.00	\$6,864.50	\$5,857.30	\$6,864.50	\$1,007.20	
Good Shepherd	P	\$204,003.00	\$17,550.33	\$201,147.00	\$16,364.73	\$197,595.00	\$16,009.53	\$200,915.00	\$20,091.50	\$16,009.53	\$20,091.50	\$4,081.97	
Grace	M	\$169,905.00	\$15,138.09	\$137,992.00	\$13,799.20	\$138,282.00	\$13,828.20	\$148,726.33	\$14,872.63	\$13,828.20	\$14,872.63	\$1,044.43	
Holy Spirit	M	\$2,570.00	\$106.92	\$5,918.00	\$117.10	\$9,714.00	\$129.37	\$6,067.33	\$606.73	\$129.37	\$606.73	\$477.36	
Resurrection	M	\$91,088.00	\$9,108.80	\$88,191.00	\$8,819.10	\$111,226.00	\$9,701.01	\$96,835.00	\$9,683.50	\$9,701.01	\$9,683.50	(\$17.51)	
Spirit of the Desert	P	\$32,314.00	\$2,242.39	\$43,854.00	\$2,466.63	\$47,490.00	\$2,713.29	\$41,219.33	\$4,121.93	\$2,713.29	\$4,121.93	\$1,408.64	
St. David	M	\$83,203.00	\$4,870.91	\$57,248.00	\$5,358.00	\$42,693.00	\$4,269.30	\$61,048.00	\$6,104.80	\$4,269.30	\$6,104.80	\$1,835.50	
St. Elizabeth	M	\$52,508.00	\$2,042.96	\$48,783.00	\$2,247.26	\$30,017.00	\$2,471.99	\$43,769.33	\$4,376.93	\$2,471.99	\$4,376.93	\$1,904.94	
St. Francis	M	\$59,757.00	\$5,975.70	\$65,771.00	\$6,573.27	\$53,387.00	\$6,577.10	\$59,638.33	\$5,963.83	\$6,577.10	\$5,963.83	(\$613.27)	
St. James	P	\$285,605.00	\$25,878.68	\$351,573.00	\$28,466.55	\$328,403.00	\$31,313.21	\$321,860.33	\$32,186.03	\$31,313.21	\$32,186.03	\$872.82	
St. John	M	\$194,025.00	\$11,497.75	\$222,669.00	\$12,647.53	\$201,266.00	\$13,912.28	\$205,986.67	\$20,598.67	\$13,912.28	\$20,598.67	\$6,686.39	
St. Jude	M	\$39,157.00	\$3,203.42	\$38,925.00	\$3,523.76	\$50,847.00	\$3,876.14	\$42,976.33	\$4,297.63	\$3,876.14	\$4,297.63	\$421.49	
St. Luke	P	\$383,696.00	\$37,865.80	\$386,327.00	\$38,972.54	\$394,508.00	\$40,036.07	\$388,177.00	\$38,817.70	\$40,036.07	\$38,817.70	(\$1,218.37)	
St. Mark	P	\$635,447.00	\$60,925.40	\$803,324.00	\$67,017.94	\$549,490.00	\$60,183.73	\$662,753.67	\$66,275.37	\$60,183.73	\$66,275.37	\$6,091.64	
St. Mary	M	\$60,512.00	\$5,500.77	\$68,176.00	\$6,050.85	\$70,549.00	\$6,655.94	\$66,412.33	\$6,641.23	\$6,655.94	\$6,641.23	(\$14.71)	
St. Michael	M	\$25,684.00	\$2,568.40	\$23,987.00	\$2,398.70	\$23,987.00	\$2,398.70	\$24,552.67	\$2,455.27	\$2,398.70	\$2,455.27	\$56.57	
St. Paul (s)	P	\$411,053.00	\$36,594.53	\$411,220.00	\$40,253.98	\$299,888.00	\$27,735.47	\$374,053.67	\$37,405.37	\$27,735.47	\$37,405.37	\$9,669.90	
St. Paul (v)	M	\$20,850.00	\$354.31	\$19,869.00	\$389.74	\$30,769.00	\$428.71	\$23,829.33	\$2,382.93	\$428.71	\$2,382.93	\$1,954.22	
St. Peter	M	\$17,411.00	\$1,741.10	\$17,193.00	\$1,719.30	\$12,998.00	\$1,299.80	\$15,867.33	\$1,586.73	\$1,299.80	\$1,586.73	\$286.93	
St. Stephen/San Esteban	M	\$86,438.00	\$6,898.09	\$79,234.00	\$7,587.90	\$58,414.00	\$5,841.40	\$74,695.33	\$7,469.53	\$5,841.40	\$7,469.53	\$1,628.13	
TOTAL ASSESSMENT AMOUNT			\$286,983.57		\$304,722.13		\$291,272.18		\$323,803.77		\$291,272.18	\$323,803.77	\$32,531.59

NOTE: used 2023 on 2024 for St Michael's - Bishop waived their 2024 report
 NOTE: 2024 - Parochial Report - Financial - Line 3 (Plate, Pledge, and Other)

OLD 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.