

Diocese of Rockford

Assessment Policy for Diocesan Appeal Parish Target/Goals

Last update: March 2009
Revised: November 2014

Step 1: - New Fiscal Year Diocesan Budget

Parish target/goals for the annual Diocesan Stewardship Appeal (which takes place in April/May of each year) are determined after the diocesan budget-making process ends with the final approval by the Bishop of the new fiscal year diocesan budget (which begins on July 1).

Step 2: - Adjustments to Parish Ordinary Income

Ordinary income (total collections), as of June 30 of the previous year, is the basis for the Diocesan Appeal assessment (target/goal). We review the financial reports for each parish to determine whether income coded to accounts below the "total collections" line should be added to ordinary income. This would include unauthorized collections (not authorized by the Moderator of the Curia) or envelopes for ordinary parish operations.

Step 3: - Average Rate of Assessment

After all adjustments to ordinary income are finalized, the total amount of the Diocesan Budget is divided by the Adjusted Total Parish Ordinary Income. This calculation produces the average rate of assessment. Each parish's (adjusted) ordinary income is multiplied by the average rate of assessment which produces the new assessment amount or parish target/goal.