

2016 Assessment Appeals Memorandum

To: Rectors, Wardens and Priests in Charge
From: The Rev. Chip Barker Larrimore
Chair, Executive Council
Re: 2016 Assessment Appeals Process and Guidelines

Dear Friends in Christ,

Below are the guidelines that will govern the assessment appeals process for 2016. These guidelines have been approved by Executive Council. If you wish to appeal for assessment relief please carefully review the guidelines to determine if your congregation qualifies and meets all requirements of the guidelines. Please note that the assessment appeals process applies to parishes only. Missions and congregations supported by Area Ministries must make appeals to the Executive Council through the Congregational Development Committee. Please contact Eric Metoyer at ericm@diocal.org.

Steps to appeal your assessment:

1. If you plan to appeal, please notify me as soon as possible at chip@larrimore.com.
2. Submit the following items in support of your appeal:
 - A written statement of explanation for your appeal providing the dollar amount of relief you are requesting. The statement must demonstrate how the assessment appeals guidelines are met and give detailed responses to items 1-5 of the “Process” section of the guidelines.
 - Parochial reports for 2014 and 2015.
 - Complete year-end financial statements and annual reports for 2014 and 2015, including statements of all fund balances.
 - Projected 2016 budget.
 - Vestry approved Application for Assessment Relief.
 - The deadline for applications is May 1, 2016. The Assessment Appeals Committee will consider requests for deadline extensions. Any parish granted an extension must submit all materials no later than June 1, 2016.
 - Once materials from all appealing congregations have been received, the Assessment Appeals Committee will set a date to meet with congregational representatives. The committee will then make recommendations to Executive Council, which has the authority to make decisions on assessment relief.
 - Please contact me with any questions about the assessment appeals process or guidelines. If you want to apply for assessment relief but don’t think your congregation meets the guidelines we especially encourage you to contact us so the committee can assist you in determining if an application is appropriate. The process is open to all parishes, regardless of size. The guidelines are firm and will be applied equally to all congregations.

Please also note this information, including Assessment Appeals Guidelines as approved by Executive Council and Application for Assessment Relief, can be found on the DioCal website, www.diocal.org, under “Resources” then “Finance and Operations” then “Assessment Appeals”.



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