

## **Resolution T1 - Establishing a 2015 Assessment Formula**

Signature Names: Jerry Nanna, Trinity Sr. Warden - Maggie Withroder, Trinity Jr. Warden - Steven Steffgen, Finance Committee - Tony Rico, Finance Committee - Victor Mashburn, Finance Committee & Trinity Foundation – Leigh Cariker, Treasurer

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*Resolved*, that the 2015 Fort Worth Diocese assessment formula shall be:

- 10% to first \$100,000
- 12% from \$100,000 - \$250,000
- 13% from \$250,000 - \$500,000
- 14% beyond \$500,000; and be it further

*Resolved*, that no parish or mission shall have an increase over the previous year's assessment of more than 50% or \$10,000, whichever is less.

### **Explanation:**

The current assessment formula of 10% on the first \$50,000 plus 16.5% over \$50,000 puts an unjust financial burden on four parishes within the Diocese of Fort Worth. This formula does not allow for nuance in diversity of church size. This formula is without a ceiling or limit to assessment total. This formula has not been studied nor revised to support the ministries of parishes, to address rising health care costs, or to shape the missional vision of the diocese.

### **Background:**

The current assessment formula has been in place since 2009. While parishes have settled into financial patterns adjusted to the current economy and diocesan structure, the assessment formula remains untouched and without adjustment.

Every parish needs and wants to support the diocesan ministry and the national church, yet each parish also needs and wants to develop ministries that serve others on the local level. Some parishes are discerning calls to church planting or forming new worshipping communities outside the context of traditional parish ministries.

Launching new ministries requires committing resources for the use of the parish rather than reserving them for diocesan assessment. Inadvertently, the current formula penalizes growth, discourages planned use of assets, and impedes the development of new ministries.

A tiered formula varies the level of financial responsibility by staggering the rates while still asking for a significant commitment from parishes with larger incomes. At its center is the tithe which is the model for personal giving and often parish commitment to mission. The higher tiers stand as a model for generosity and in some cases the sacrificial giving that stretches beyond the tithe.