



ARCHDIOCESE OF SAINT PAUL AND MINNEAPOLIS
CLERGY BULLETIN

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PARISH ASSESSMENT FORMULA

Reverend and dear Fathers,

In 1979, my predecessor, the Most Reverend John R. Roach, issued a policy for the individual assessment of parishes. Since that time, periodic adjustments have been made to the formula. However, one of the recommendations of the Strategic Plan was that the assessment formula be revisited, and so a sub-committee was established under the direction of the Archdiocesan Finance Council.

The subcommittee made its recommendation regarding a new proposal in 2011. This recommendation was then approved by the Archdiocesan Finance Council, discussed with parish pastors and trustees, and then brought to the Presbyteral Council for its discussion and approval, as is required by canon law. The Council granted its approval of the new formula on September 11, 2012. Therefore, the required process having been followed, I hereby establish the following parish assessment formula as particular law for the Archdiocese of Saint Paul and Minneapolis. The revenue from the revised assessment formula will be collected beginning the 2015-2016 fiscal year, based on actual parish collections beginning the fiscal year of 2013-2014.

Given at Saint Paul, Minnesota, this 6th day of November, in the year of Our Lord 2012. All things to the contrary notwithstanding¹.

The Most Reverend John C. Nienstedt
Archbishop of Saint Paul and Minneapolis

Jennifer Haselberger
Chancellor for Canonical Affairs

The following assessment formula will be applied to all parishes of the Archdiocese of Saint Paul and Minneapolis, and to other communities of the faithful at the discretion of the Archbishop, in accord with the provisions of canon 1263 of the *Code of Canon Law*.

Parishes with schools or school sponsorship agreements:

- Annual plate and envelope collections will be assessed at 8% for parishes that operate a parochial school consisting of grades K-6 or above, as well as parishes that have a sponsorship agreement with a consolidated school and which contributed at least 15% of the parish's annual plate and envelope collections to the school in the previous year.
- These same parishes will also be assessed at a rate of 8% on other income, including but not limited to any rental income derived from charter schools.
- Income passed to others is excluded from this assessment, as are rebates received from the Catholic Services Appeal as well as any rebates from Archdiocesan capital campaigns, when applicable.

Parishes and other communities of the faithful without schools or school sponsorship agreements:

- Annual plate and envelope collections will be assessed at 9% for parishes and other communities of the faithful that do not operate a parochial school consisting of grades K-6 or above and did not contribute at least 15% of the annual plate and envelope collection to a consolidated school.
- The same parishes will also be assessed at a rate of 9% on other income, including but not limited to any rental income derived from charter schools.
- Income passed to others is excluded from this assessment, as are rebates received from the Catholic Services Appeal as well as any rebates from Archdiocesan capital campaigns, when applicable.

All parishes and other communities of the faithful will be assessed at a rate of 2% on monies raised for building projects and debt reduction, provided that the money was raised specifically for that purpose and its collection directly benefits the parish or the community.

It is the exclusive prerogative of the Archbishop of Saint Paul and Minneapolis to entertain or grant requests from parishes for exemptions and adjustments to this policy.

The promulgation of this policy does not limit or restrict the Archbishop of Saint Paul and Minneapolis from imposing the extraordinary tax mentioned in canon 1263 should circumstances require it.

ⁱ As there may be some significant changes in parish assessments as a result of this transition, a three-year average will be used in years 2015-2016 (averaging two previous assessment amounts with the new assessment amount), 2016-2017 (averaging one previous assessment amount with two new assessment amounts), and 2017-2018 (average of the previous three years' assessment amounts).