

The Allocation

Allocation Formula Overview

Step 1. $(A + B)/2 \times \text{Total Appeal} = Y$ (Initial Allocation)

Step 2. $C+D = Z$ (Credits)

Step 3. $Y-Z = \text{Gross Parish Allocation}$

Step 4. Parish allocations are adjusted so that no parish has an increase of no more than 10% or \$10,000 or drop more than -10% or -\$2,500 from their previous year's allocation. (Final Allocation)

A, B, C, and D are from the Annual Report

The Allocation

Allocation Formula Adult Offertory

Variable A: Line 16 (401): The adult offertory for a parish as a percentage of the entire adult offertory for the Diocese for the 2022-2023 fiscal year.

The Allocation

Allocation Formula Envelop holders contributing >\$100.00

Variable B: The number of envelope holders contributing \$100.00 or more per year to a parish as a percentage of the total number of envelope holders who gave \$100.00 or more for the Diocese for the 2022-2023 fiscal year.

The Allocation

Allocation Formula School and Convent Expense

Variable C: School Calculation 1: Line 102B (School and Convent), for a parish as a percentage of Line 102 for the total for the Diocese. This percentage is then multiplied by \$690,000 = C.

The Allocation

Allocation Formula Catholic School Children from the Parish's Registered Families

Variable D: School Calculation 2: The number of parish students enrolled in Catholic schools multiplied by \$88.00 = D.

The Allocation

Allocation Formula Adult Offertory Example

Step 1. $((A + B)/2) \times \$\$ 6,880,539 = Y$

Variable A: Line 16 (401): The adult offertory for a parish as a percentage of the entire adult offertory for the Diocese for the 2022-2023 fiscal year.

$$(A) \ 235,122 / \$37,619,549 = 0.00624999$$

Parish Adult Offertory / All Diocese Total Adult Offertory

The Allocation

Allocation Formula Envelop Holders >\$100 Example

Step 1. $((A + B)/2) \times \$6,880,539 = Y$

Variable B: The number of envelope holders contributing \$100.00 or more per year to a parish as a percentage of the total number of envelope holders who gave \$100.00 or more for the Diocese for the 2022-2023 fiscal year.

$$220/35,120 = 0.00626423$$

Parish Envelope Holders >100/All Diocese Total Envelope Holders > 100

The Allocation

Allocation Formula Offertory and Envelop Holder Example

Step 1. $((A + B)/2) \times \text{Total Appeal} = Y$

$$(A+B) \quad 0.00624999 + 0.00626423 = .01251422$$

$$(A+B) = .01251422$$

$$((A+B)/2) \quad .01251422/2 = .00625711$$

$$(Y) \quad .00625711 \times 6,880,539 = 43,050$$

The Allocation

Allocation Formula Credit School and Convent Expense Example

Step 2. $C+D = Z$

$$C = 188,986 / 30,237,811$$

$$0.00624998 \times -690,000 = (4,310)$$

Schools and Convent Receipts / All Parish School and Convent Receipts \times -690,000

The Allocation

Allocation Formula Credit School Children Example

Step 2. $C+D = Z$

$$D = 38 \times -\$88 = (3,345)$$

Total number of students enrolled at parish x per student credit

The Allocation

Allocation Formula Credit Reduction in Allocation Example

Step 2. $C+D = Z$

$$Z = (-4,310 - 3,345) = (7,655)$$

The Allocation

Allocation Formula Gross Allocation Example

Step 3. $Y-Z = X$

$$X = 43,050 - 7,655 = 35,395$$

Gross Parish Allocation

The Allocation

Allocation Formula Net Allocation Example

Step 4.

Adjust parish allocations—no parish can increase by more than 10% or \$10,000 or decrease by more than 10% or—\$2,500 in a year. Any dollars exceeding these thresholds are then redistributed to parishes not at these limits.

=Final Parish Allocation