



The  
Episcopal Diocese  
of New York

## Appeal Package Guidelines

Information to be submitted by Congregations  
wishing to appeal their Calculated Apportioned Share (CAS)

### Your Appeal Package should contain:

1. **Cover Letter (1-2 pages):**

Please address a concise cover letter to the Adjustment Board that describes:

- a. The amount of relief your congregation seeks,
- b. Why the relief is needed (that is, how an adjustment of the CAS would benefit your congregation),
- c. When and how you plan to return to full payment (see item 3 below). NB: The Board **cannot** grant CAS relief without a plan to return to full payment within a reasonable period of time,
- d. Any prior appeal to the Adjustment Board, the date of that appeal, and what, if any, relief was granted,
- e. Your endowment/investment account drawdown policy, if any, and
- f. Your staffing – clergy and lay.

2. **Financials:** Please complete the accompanying Excel spreadsheet using data from your Parochial Reports.

3. **Plan for Returning to Full CAS:** Please complete the second accompanying Excel spreadsheet that shows the full Calculated Apportioned Share (CAS) that was (or will be) due and the amount paid (or to be paid) if not paid in full for each year. **Appeals will not be considered without a plan to return to full CAS payment.**

**What not to include:** *Please do not send copies of Parochial Reports, Audits, Annual Reports, Insurance Policies, or anything not specifically asked for in these guidelines. While there may be a temptation to provide more material than is asked for, the Board is looking for a succinct overview through these new guidelines.*

**Submission:** Your package should be emailed to the following no later than two weeks prior to your meeting date with the Adjustment Board. Please do not send paper unless it is necessary.

### Important Contacts:

- Esslie Hughes, Chief of Finance and Operations  
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- Karin Almquist, Senior Accounting Manager  
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- Andrew Gary, Assistant to the Chief of Finance and Operations  
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