



The
Episcopal Diocese
of New York

Appeal Package Guidelines

Information to be submitted by Congregations
wishing to appeal their Apportioned Share

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 Apportioned Share would benefit your congregation),
- c. When and how you plan to return to full payment (see item 3 below). NB: The Board **cannot** grant Apportioned Share 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 Apportioned Share:** Please complete the second accompanying Excel spreadsheet that shows the full Apportioned Share 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 Apportioned Share 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
ehughes@diocesenyny.org
212-316-7409
- Karin Almquist, Controller
kalmquist@diocesenyny.org
212-316-7534
- Andrew Gary, Assistant to the Chief of Finance and Operations
agary@diocesenyny.org
212-932-7322