



 *Visitation*

ANNUAL REPORT  
2021-2022





November 15, 2021

Dear People of Visitation,

Once again, Visitation Parish offers this annual report for the July 2020-June 2021 fiscal year. As always, our diligent staff has computed the financial numbers and organized assorted details about the past twelve months to deliver these financial statements and the associated explanations.

Visitation remains a successful parish because of the vast investment of both human and financial resources provided by you good people. I'd be lying if I said the past year and a half has been easy. But, in true Vis fashion, our community continues to worship, pray, learn and serve together in this place which our founders started over 110 years ago.

I cannot begin to express the appreciation I have for each of you and, in particular, for your prayers and patience as we've navigated the pandemic. I know that we have worked hard to do the best that we could under the circumstances. As I requested last year, may we continue to be each other's mutual encouragement. I am heartened by your presence and your continued support.

In our Holy Communion,

A handwritten signature in blue ink, reading "Bradley S. Offutt", with a stylized flourish at the end.

Msgr. Bradley S. Offutt

# The Year in Review

As always, we are happy to provide a variety of data, pictures, comments and accounts in order to highlight our parish's accomplishments over the past fiscal year. We would be remiss, however, if we did not acknowledge that the effects of the Covid-19 pandemic extended longer than any of us could have imagined. The past year certainly did not go as planned, but we still have so much good news to share. We are most grateful for the patience and resiliency that our parish community has shown as we navigated this past year.

† Visitation remains a relatively young parish with over 54% of our registered parishioners under the age of 40. Age demographics for our 1,431 households are as follows :

Ages 18 & under	28.9%
Ages 19-39	25.7%
Ages 40-65	31.6%
Ages 66 & over	13.8%

† 914 households made a financial contribution to the annual appeal or the Capital Improvement Fund during the 2021-2022 fiscal year. Our contributors can be broken down into segments as follows:

Total gifts under \$1,000.00	233 households	25.5%
Total gifts \$1,000.00-\$4,999.00	419 households	45.8%
Total gifts \$5,000.00-\$9,999.00	165 households	18.1%
Total gifts \$10,000.00 & over	97 households	10.6%

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Did You Know?

*“PEOPLE, WHEREVER THEY ARE, CAN MAKE A COMMUNITY.”*  
*- DOROTHY DAY -*

# Virtual Visitation

Virtual Visitation became a true reality for the parish over the past year and a half. The initial closure of the parish & school, followed by months of restrictions on gatherings necessitated using the virtual world to conduct our business. We quickly learned to navigate Zoom meetings, video chats, live-streamed liturgy and more. Here is some data about our voyage into all things virtual:

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*Thank you for your support of our virtual efforts!*



# Visitation's Commitment to the Poor

July 1, 2021 - June 30, 2022

Visitation has been designating a percentage of our total parish budget to assist the poor and vulnerable (marginalized) for 47 years. A central part of our ministry, this commitment extends beyond our doors and immediate neighborhood, throughout the Kansas City community and beyond. During 2021-2022, our Social Concerns Team allocated \$186,236 in funds.

## Emergency Assistance Fund

18 parishes or ministries who provide emergency support to individuals or families in need received \$56,400 in emergency assistance funds. The monies assist these organizations in providing assistance with food, clothing, utilities, rent, medical expenses, bus passes or other daily needs. Most of these agencies are located in areas where the financial needs are greater than those in our immediate area.

From St. Louis Pantry:  
There was a young woman who came in and was in need of clothing as she had lost everything in a flood in her home. She had an interview for a job. We were able to provide several outfits, shoes and food. She returned two weeks later with great news: she got the job! Amen!

Bishop Sullivan Center—Troost	\$3,600	Reconciliation Services	\$1,200
Bishop Sullivan Center—Truman	\$3,600	Sacred Heart/Guadalupe	\$3,600
Christ the King	\$3,600	St. Anthony's Parish	\$1,200
Guardian Angels	\$3,600	St. Francis Xavier	\$4,800
Holy Cross	\$2,400	St. Louis Social Services	\$1,800
Journey to New Life	\$2,400	St. Monica Social Services	\$2,800
Morning Glory Ministries	\$3,600	St. Therese Little Flower	\$4,800
Our Lady of Peace	\$2,400	Seton Center	\$4,800
Redemptorist Social Services	\$4,800	Troost 39	\$1,400

## Parish Based Ministry Supplement

Visitation provided \$30,000 to assist in paying the salaries of lay ministers at St. Anthony Parish, Our Lady of Peace Parish and Holy Cross Parish. **Father Andres Moreno, Pastor at St. Anthony and Parochial Administrator at Our Lady of Peace & Holy Cross** said, "Dear Visitation Community—We want to express how grateful we are for receiving the parish-based ministry grant. It is especially appreciated because it supports our parish staff such as our Religious Director, Maintenance Supervisor and Secretary. God Bless you."

## Emergency Assistance at Visitation

Visitation assisted individuals and families who live near or within our parish boundaries with \$8,719.54 worth of immediate needs including temporary shelter, rent/utility bills, food, prescription medications, medical expenses and transportation.

## Habitat for Humanity – The House of Abraham

Currently, House of Abraham, including Christian, Jewish and Muslim partners (the religions of Abraham), are in the process of renovating a home. We were able to add \$11,439.98 to a reserve account for Habitat for Humanity for future projects and builds.



## Community Garden

Last spring, \$71.30 was spent on seeds and plants this year for the Community Garden. **Our hardworking gardeners from St Francis Xavier and Visitation harvested a record-breaking 1,100 lbs. of fresh produce!** The food was distributed to those in need via the St. Francis Xavier food pantry, with the abundance shared with Kanbe's Market.

## Community Grants

Two-third of the clients at Sheffield Place are children. Like their mothers, they have often experienced the trauma of separation from their mothers; physical, sexual and verbal abuse; chronic instability; lives of chaos; exposure to addiction and homelessness itself. The grant from Visitation/St. Francis Xavier changes the lives of highly traumatized homeless children and families each day by providing much needed mental health care and emotional support.

Visitation provides funds for small grants to community-based organizations whose initiatives fall within the scope of Catholic Social Teaching. The Visitation/St. Francis Xavier Social Concerns Ministry Team works together to review the grant proposals and allocate the funds to areas of concern including life, poverty and justice issues. This year, \$32,000 (32 grants of \$1,000 each) were awarded to the following agencies/programs:

- Defense of Life: Alexandra's House, Missourians for Alternatives to the Death Penalty, Mother's Refuge
- Youth and Education: Cristo Rey High School, The Family Conservancy, Fire Foundation, Halo Foundation, Our Lady's Montessori School, Sheffield Place
- Literacy Tutors: Keeler Women's Center, The Learning Club
- Medical/Mental Health: Brain Injury Association, Care Beyond the Boulevard, Duchesne Clinic
- Reintegration Support: Companions in Chillicothe, Journey House
- Veterans Support: Veteran's Community Project
- Emergency Assistance: Mid-America Assistance Coalition, Morning Glory Ministries
- Housing: Community LINC, ReStart
- Economic Empowerment: Catholic Charities, Holy Rosary Credit Union
- Domestic Violence/Sexual Assault: Metropolitan Organization to Counter Sexual Assault (MOCSA), Rose Brooks Center
- Women in Poverty: The Justice Project, The Tamale Kitchen
- Senior Ministry: Jeanne Jugan Center/Little Sisters of the Poor, Shepherd's Center
- Migrant Aid: Migrant Farmworkers Assistance Fund
- Advocacy for Peace/Non-Violence: Jerusalem Farm, KC Mothers in Charge

The Social Concerns section of our website includes links to these agencies in order to learn more about them and how you might become involved in their activities.

### Sister Parish—Santa Maria Madre de Los Pobres

Since 1988, Visitation has maintained a sister parish relationship with Santa Maria Madre de los Pobres in San Salvador, El Salvador. We walk with our brothers and sisters at Madre in prayer and action. This year, \$37,247.00 was allocated to support Madre's early childhood development program, the CAPI, where 140 children are served each day.

Since 2006, the child sponsorship program has given our parishioners the ability to support a child from the Madre community. Each \$300.00 annual contribution helps to provide school uniforms, supplies and medical care for the child until they complete grade school. Visitation families currently sponsor 80 children in the program.



← The staff at Madre's early childhood program, the CAPI.

### Madre Medical Clinic

October 2019 was the last time we were able to send a delegation because of COVID; however, we continue to stay in contact with the staff at the clinic. We learned in October 2020 that they needed help with items to re-open the dental clinic to the community. Our Madre Steering Committee approved \$3,300.00 in funds raised from our annual Madre Month & Ride for Madre fundraisers to repair a dental chair and purchase a table and saliva ejector.

### Salary Support

Our Madre Steering Committee was also able to send \$5,211.50 from our 2021 fundraising efforts to assist the parish with salaries???????????????



**Miscellaneous**

Miscellaneous social concerns expenses and donations to the organizations who totaled \$200.00 were given to Bread for the World. The Social Concerns Committee had miscellaneous expenses during the year of \$209.01.

In response to requests from various agencies, we were able to make the following gifts to assist with immediate needs:

Ctr. for Conflict Resolution	\$ 800.00	Educational programming
Della Lamb	\$2,000.00	Refugee Resettlement
Office of Hispanic Ministry	\$1,000.00	Summer program
Holy Cross School	\$2,000.00	Religion books
Holy Rosary Credit Union	\$2,000.00	Payday loan program
Jewish Vocational Services	\$2,000.00	Refugee Resettlement
KC Mothers in Charge	\$2,000.00	Funeral expense fund
Little Sisters of the Poor	\$2,000.00	Medication for residents
Our Lady of Hope School	<u>\$1,000.00</u>	Technology Support
Total	<b>\$14,800.00</b>	



## Visitation Parish Vital Statistics 2020-2021

Registered Households	1,413	Baptisms	68
Visitation School Students 2020-21	518	First Communions	63
School of Religion Students	32	Confirmations	47
RCIA Participants	7	Marriages	17
		Deaths	25

# Annual Financial Report

## Highlights for Fiscal Year 2021-2022

Our annual financial plan was to manage our operating budget of \$5,109,854 to a breakeven level or better, utilizing the revised 3-year average contribution model (*adopted 2019-2020*) instead of the former “previous year actual contributions become this year’s budgeted contributions” method. This 3-year average model allows annual fluctuations in contributed revenue, particularly significant growth or decline from year to year, most frequently caused by changes in donor giving patterns, to impact budget projections in a less substantial way. At the same time, we resolved to manage the growth of our long term Capital Improvement fund in order to address future facility needs.

Overall Contribution Income for 2021-2022 fiscal year rebounded nicely from the downturn in the previous year and exceeded the 3-year average budget figure by over \$127,000. We attribute the rebound to the end of the COVID pandemic which increased our Sunday collections, removed restrictions on Mass attendance and reestablished programs and activities in the parish. School Fundraising income increased from last year by 8.9% after another successful auction. Overall, Total Parish Operating Income increased by \$324,600, or 6.59%, compared to the prior year.

We are grateful for your continued support which makes this possible.

### Year Ending June 30, 2022

#### Total Operating Income

Visitation has four basic sources of operating income:

**Contribution Income** - Contribution income in 2021-2022 totaled \$4,280,688 or 81.56% of parish operating income. Contribution income includes contributions made towards parishioner pledges as well as offertory plate income from visitors, holy day collections and donations from parishioners who did not make a pledge.

**School Tuition and Fee Income** - School Tuition and Fees Income amounted to \$486,956 or 9.28% of total operating income. In 2021-2022, this revenue category covered 14.89% of school expenses. This source of income consisted of the following items: Tuition income - \$138,731; Adjusted tuition income - \$132,900; Registration /Book & Activity Fee income - \$188,112 and After Care income - \$ 27,213

**School Fundraising Income** - This is income that was raised for the school through the annual auction, trash bag sale, flower sale and other events. Also included here are grants and gifts designated for specific programs or materials. Fundraising income accounted for \$334,807 or 6.24% of total operating income and funded 10.24% of school expenses.

**Other Income** - In addition to facility rental, interest income, Mass stipends and candle donations, Other Income includes fees that parishioners pay for participating in certain activities such as the School of Religion and Confirmation. Other Income generated \$145,960 or 2.78% of total operating income.

#### Visitation by the Numbers

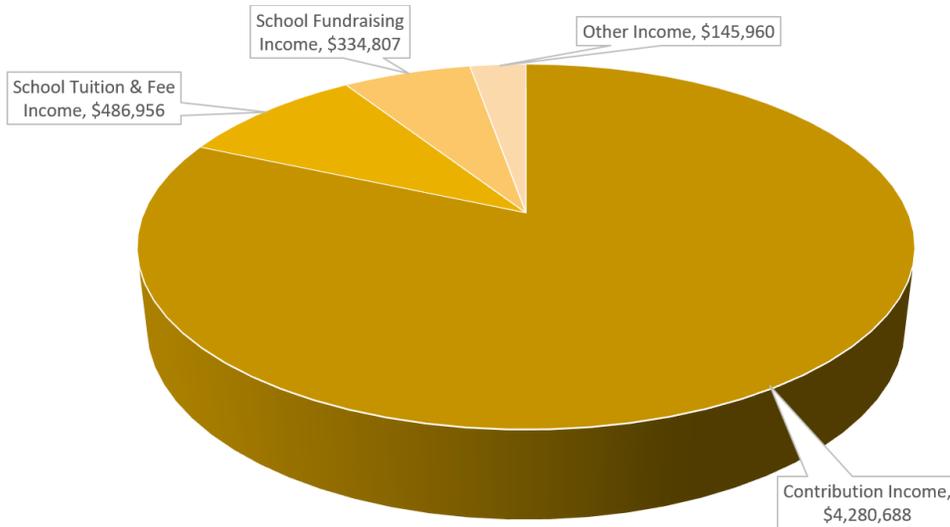
1,600 Number of followers on our parish Facebook page

51 Number of 8th grade graduates from Visitation School in 2022

908 Number of parish households who made a financial gift to either the 2021 or 2022 annual appeal during the 2021-2022 fiscal year

141 Number of parishioners with the first name Mary or Elizabeth

The chart below depicts the main categories of total operating income during the 2021-2022 fiscal year.



## Total Operating Expense

We classify operating expenses into ministry or departmental segments as follows:

**School Ministry** – Visitation Parish is dedicated to providing a quality Catholic education for the children of the parish. During the 2021-2022 academic year, 467 students from 248 parish families were enrolled in our school. School expenses were \$3,268,105 or 61.89% of total parish operating expenses and included salaries for teaching and non-teaching staff, textbooks, classroom supplies, computers, furniture and equipment, library books, teaching resources and field trips. Facilities expense for the school building is also included and amounted to \$324,554 or 10.11% of the total school expenses.

**Church Facilities** – Facilities expense includes such items as utilities, custodial and maintenance services and salaries, repairs, improvements, snow removal, lawn care, security expense, etc. The facilities expense for the church, office building and priest residence was \$342,512 or 6.49% of the total operating expenses.

**Administration** – Administration is the department which assures appropriate management and use of parish resources. This expense area includes salaries for management, stewardship and support staff, as well as property and casualty insurance, stewardship expense, printing, office supplies, postage, website and communications, offertory envelopes and special events. Administrative expenses were \$683,003 or 12.93% of total expenses.

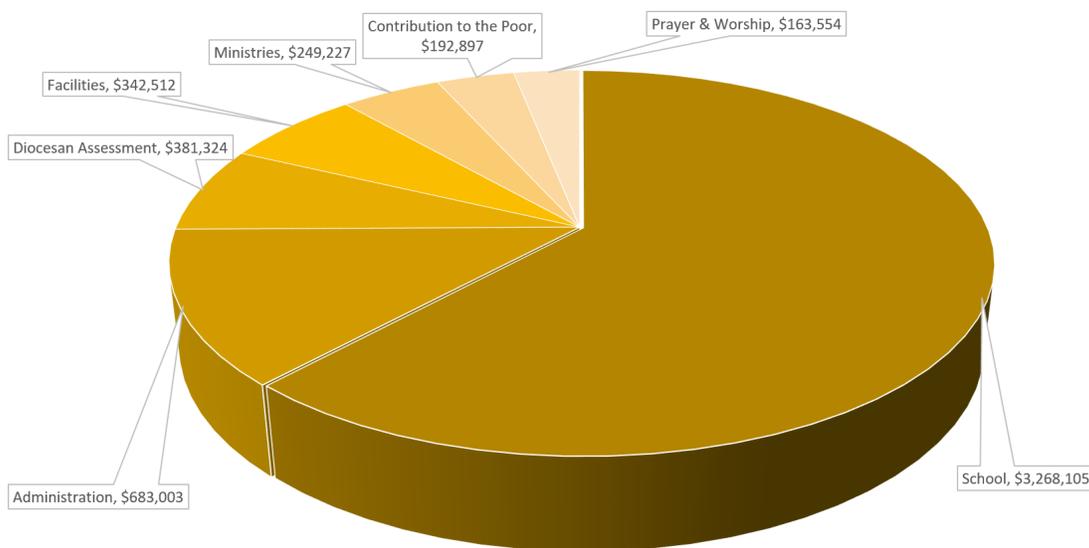
**Prayer and Worship** – Prayer and Worship is integral to our existence as a faith community, shaping and nourishing every member of the parish. Expenses include all costs necessary to celebrate liturgy at Visitation: organists, musicians and substitute priests; creating an environment appropriate to the season; candles, communion supplies and all other items necessary to celebrate the Eucharist. In 2021-2022, the expense for Prayer and Worship totaled \$163,554 or 3.10% of all operating expenses.

**Pastoral Ministries** – Visitation parishioners participate in and are assisted by a number of parish ministries. This budget area includes pastoral care, adult faith formation, RCIA, School of Religion, senior ministry and sacramental preparation. The cost for providing these ministries at Visitation for 2021-2022 represented 4.72% of total expenses or \$249,227.

**Contribution to the Poor**—For over 4 decades, Visitation Parish has made a commitment to tithe a portion of contribution income to help the poor. These funds are allocated by parish staff and the Social Concerns Ministry Team, either directly or through social service agencies in our community. A detailed report of how these funds are distributed is included in this booklet. The formula used to calculate our Contribution to the Poor is: Contribution Income minus Diocesan Assessment times 5%. In 2021-2022, the amount designated for these efforts was \$192,897.

**Diocesan Assessment**—Visitation, like all parishes in the Diocese of Kansas City-St. Joseph, provides financial support to the diocese. The diocese requests an amount equal to 9.25% of our total prior year income minus half of prior year school expenses. In 2021-2022, the amount given for diocesan assessment was \$381,324 or 7.22% of total expenses. This segment also includes an assessment of 2.0% of total prior year income minus 100% of school expenses to support Catholic education throughout the Diocese. The amount of school assessment was \$41,590 in 2021-2022.

In this graphical presentation of the 2021-2022 expenses, they are grouped into functional or ministry areas. The results for each segment include all associated salaries, benefits and operating expenses.



### Capital Projects Fund Results for 2021-2022

Gifts to the Capital Improvement Fund totaled \$137,204. These monies were invested in the Visitation Capital Improvement Investment Fund housed at the Greater Kansas City Community Foundation. At the close of the fiscal year on June 30, 2022, the fund balance was \$1,764,796.

Extraordinary expenses of \$111,805 during the 2021-2022 fiscal year included the costs of school floor and carpet replacement on the third floor, roof repair over the school gymnasium, removal/reinstallation of school solar panels to allow for the roof repair and a new projector and audio system in Tighe Hall. All of these project expenses were paid out of the parish operating budget.

### A VISITATION BY THE NUMBERS QUIZ—HOW CAREFULLY HAVE YOU READ?

Match the number on the left with the definition on the right.

- |              |  |
|--------------|--|
| 1. \$324,600 | a. School fundraising income in 2021-2022                    |
| 2. \$342,512 | b. 2021-2022 Parish Operating Income increase over 2020-2021 |
| 3. \$334,807 | c. Church facilities expense in 2021-2022                    |

ANSWERS: 1-b; 2-c; 3-a

## Prior Year Results and Budget for 2022-2023

	2018/2019 Actual	2019/2020 Actual	2020/2021 Actual	2021/2022 Actual	2022/2023 Budget	% Increase (Decrease)
<b>Operating Income</b>						
Contribution Income	\$ 4,084,386	\$ 4,263,280	\$ 4,110,438	\$ 4,280,688	\$ 4,217,957	-1.5%
Tuition and Fee Income	\$ 384,472	\$ 432,561	\$ 444,004	\$ 486,856	\$ 476,435	-2.2%
School Fundraising Income	\$ 300,122	\$ 301,622	\$ 307,317	\$ 334,807	\$ 507,000	51.4%
Other Income	\$ 72,620	\$ 61,304	\$ 62,050	\$ 145,960	\$ 49,580	-66.0%
<b>Total Income</b>	<b>\$ 4,841,600</b>	<b>\$ 5,058,767</b>	<b>\$4,923,810</b>	<b>\$ 5,248,410</b>	<b>\$ 5,250,972</b>	<b>0.05%</b>
<b>Operating Expense</b>						
School (including school facilities)	\$ 3,151,747	\$3,068,8831	\$3,250,630	\$ 3,268,105	\$ 3,261,511	-0.2%
<b>Parish Operating Expenses</b>						
Facilities Expense	\$ 448,724	\$ 387,819	\$ 365,334	\$ 342,512	\$ 361,126	5.4%
Administration	\$ 576,838	\$ 541,029	\$ 582,901	\$ 683,003	\$ 642,563	-5.9%
Prayer and Worship	\$ 178,715	\$ 155,966	\$ 146,114	\$ 163,554	\$ 158,713	-3.0%
Ministries	\$ 254,761	\$ 219,855	\$ 218,382	\$ 249,227	\$ 279,263	12.1%
Contribution to the Poor	\$ 193,238	\$ 182,509	\$ 192,103	\$ 192,897	\$ 195,042	1.1%
Diocesan Tithe	\$ 387,111	\$ 333,325	\$ 366,694	\$ 381,324	\$ 352,753	-7.5%
<b>Subtotal Parish Operating Expenses</b>	<b>\$ 2,039,387</b>	<b>\$ 1,820,505</b>	<b>\$1,871,528</b>	<b>\$ 2,012,517</b>	<b>\$ 1,989,461</b>	<b>-1.1%</b>
<b>Total Expenses</b>	<b>\$ 5,191,134</b>	<b>\$ 4,889,388</b>	<b>\$5,122,158</b>	<b>\$ 5,280,622</b>	<b>\$ 5,252,972</b>	<b>-0.6%</b>
<b>Operating Income (Loss)</b>	<b>\$ (349,534)</b>	<b>\$ 169,379</b>	<b>\$ (198,349)</b>	<b>\$ (32,212)</b>	<b>\$ 0</b>	
<b>Capital Project Income</b>						
Capital Improvements Contributions	\$ 151,093	\$ 165,054	\$ 145,043	\$ 132,686	\$ 132,000	
Donations/Memorials/Bequests	\$ 97,340	\$ 54,374	\$ 11,361	\$ 4,518	\$ 5,000	
<b>Total Capital Project Income</b>	<b>\$ 248,433</b>	<b>\$ 219,428</b>	<b>\$ 156,404</b>	<b>\$ 137,204</b>	<b>\$ 137,000</b>	
<b>Capital Project Expense</b>						
Deferred Diocesan Assessment	\$ 63,408	\$ 63,364	\$ 5,280	\$ -	\$ -	
Extraordinary Expenses	\$ 57,760	\$ 331,443	\$ 180,960	\$ 111,805	\$ 130,000	
New Construction/Major Renovation	\$ 350,217	\$ -	\$ 675,819	\$ -	\$ -	
<b>Total Capital Project Expense</b>	<b>\$ 471,385</b>	<b>\$ 394,807</b>	<b>\$ 862,059</b>	<b>\$ 111,805</b>	<b>\$ 130,000</b>	
<b>Capital Project Income (Loss)</b>	<b>\$ (222,952)</b>	<b>\$ (175,379)</b>	<b>\$ (705,655)</b>	<b>\$ 25,399</b>	<b>\$ 7,000</b>	
<b>Total Net Income (Loss)</b>	<b>\$ (572,486)</b>	<b>\$ (6,000)</b>	<b>\$ (904,004)</b>	<b>\$ (6,813)</b>	<b>\$ 7,000</b>	

# 2022-2023 Budget Highlights

Our budget is broken down into two major segments—Operating and Capital Projects. The Operating budget provides the foundation for day-to-day and week-to-week parish activities. The Capital Projects budget is dedicated to extraordinary repairs and facilities expenses.

## Operating Segment

The total budgeted operating income and expense for 2022-23 is \$5,250,972. In our financial plan, we allocate 55% of Contribution Income to support the school. We then develop a balanced operating budget for both the church and school.

Our contribution budget for the fiscal year ahead is built using a rolling 3-year average model. The increase in contributed revenue during 2021-22 somewhat offset the shortfall in 2020-21 bringing the average used for this year's budget to \$4,217,957, just slightly lower than last year's actual results. Other income is expected to be lower in 2022-23, as a significant part of last year's income came from the EANS grant which covered the cost of having additional classrooms in Tighe Hall (\$90,000) during the pandemic year 2020-2021 but wasn't received until the following year. School tuition and fee income, is budgeted based on actual enrollment for the upcoming school year. This year the number of students enrolled decreased by 4%, resulting in a 2.2% reduction in this year's budget. This line includes all enrollment fees: registration, instruction, adjusted tuition and grade level fees collected this year as well as expected tuition payments for non-parishioner students and fees paid by those utilizing our extended care program. School Fundraising Income in 2022-23 is budgeted to increase by 51.4% or 507,000 due to an increase in our FIRE Grant and a transfer of all auction proceeds from PTO. In total, our expected operating income for 2022-2023 is only .05% higher than the prior year actual receipts.

The yearly operating expense budget was developed jointly by staff considering the income anticipated and the presumption that parish meetings and activities would resume as normal in the months to come. Parish operating expenses are budgeted to decrease by 1.1% over 2021-22 actual expenses.

Beyond the manner in which expenses were broken down by ministry or functional area on the prior pages, here is an analysis at a more operational level for 2022-23 budgeted expenses. Reporting the data in this manner illustrates that many of the expenses are “fixed,” making a relatively small portion of the total budget available for discretionary spending.

**Salaries and benefits**—We have budgeted total personnel expense for the school at \$2,603,543 or 79.83% of budgeted school expense. We employ 42 full-time and 15 part-time school employees. Personnel expense for the 9 full-time and 2-part time church employees is projected at \$740,098 or 37.2% of budgeted church expense. The Diocese sets the salary scales and coordinates the benefit plans for all personnel with individual pay rates fitting within a range for a particular job function. Total parish salaries and benefits account for 63.68% of all expenses.

**Facilities Expense**—Total Parish Facilities Expense is budgeted at \$647,617 or 12.3% of the total parish expense budget, with the school accounting for \$385,249 and the church \$262,368. Facilities Expense can be further broken down into 3 major categories:

**1. Repair and Maintenance**—This category includes expenses for upkeep of our buildings and grounds, maintaining building equipment, ensuring security and providing supplies such as light bulbs, paper goods, etc. It does not include the expense for our maintenance and custodial staff which is included in Salaries and Benefits above. The total parish-wide budget for 2022-23 is \$336,767.

**2. Utilities**—Utility expense for electricity, gas, water, telephone and internet services account for \$245,650 of the parish expense budget.

**3. Technology**—This category includes maintaining computers, new hardware and software purchases, leasing and supplying copiers and printers, and is budgeted at \$65,200 for 2022-23.

**Diocesan Obligations**—The Diocese insures our buildings and their contents. The most recent insurance valuation of all campus buildings totals \$26,614,000. Insurance expense is split between the school and church based on relative insured value. Insurance premiums will increase 3% year over year and will represent 5.6% of the 2022-2023 budgeted expenses. In addition, the Diocese provides various services to parishes including the coordination of employee benefit plans, training for liturgical ministers, oversight of the safe environment program and support for professional staff. Without the functions provided by the Diocese, parishes would have to expend additional resources. To help fund Diocesan services and programs, parishes are assessed 9.25% of total prior year income minus one half of school expenses. This assessment is absorbed by the church budget. There is also a per-pupil assessment paid to the Diocesan school office which is absorbed by the school budget. In addition, the 2% Catholic School assessment for the 2022-23 fiscal year has been calculated at \$35,642. This brings our total assessment due for the parish to \$360,753. Property and casualty insurance for the Parish is budgeted at \$294,168.

**Contribution to the Poor**—We support various organizations which serve those in need in our community. We calculate this giving on the following formula: Budgeted Contribution Income minus Diocesan assessment multiplied by 5%. Based on this formula, for the 2022-23 fiscal year we have allocated \$195,042 or 3.71% of the total parish budget for our Contribution to the Poor.

Identified above, these four major functional expense categories total \$4,175,221, or 73.51% of the entire parish operating expense budget. They represent \$3,132,109 of the school expense budget, or 96.03%, and \$1,514,070 of the church expense budget, or 76.10%. The remainder of the budget is then allocated to support all other expenses such as liturgical supplies, music at worship services, celebration events, office supplies, postage, printing, textbooks, legal fees, banking fees, religious books and magazines, candles and funeral meals to name just some of the numerous costs necessary to operate our parish.

### Capital Projects Segment

All of the income generated from those designating their donations to the Capital Improvement Fund, as well as undesignated memorial gifts and bequests, are invested in the Visitation Capital Improvement Fund. Based on the past few years, we project \$137,000 in total contributions to the Capital Improvement Fund during 2022-23.

This segment includes a number of significant expenses for large facility and maintenance projects, including new church speaker system, repair and refinish of church doors, playground surface replacement, repair of school gym roof\* (including removal & reinstallation of solar panels) and recoating of church parking lot.

*\*Summer project: partial payment in each of the 2021-22 and 2022-23 fiscal years.*

### *Need more information?*

The purpose of this report is to provide our parishioners with a complete picture of what our parish stewardship accomplished during the past year. We also hope to offer noteworthy highlights of parish events, interesting parish statistics and how our efforts supported those in need. Please share your ideas to make our next report better!

If you have questions, comments or would like additional information about anything included in this report, please contact:

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