



 *Visitation*

ANNUAL REPORT

2023-2024



November 5, 2024

Dear Parishioners,

What I have witnessed in my first year at Visitation has inspired me and excited me. The vitality of parish ministry here, the high level at which these ministries operate and serve, and the impact we have on the neighborhood and the world testify to the depth of faith and generosity so alive in this community.

We are delighted to share this good news in the annual report. It tells the story of a people responding to the mission Jesus has entrusted to us: to teach, to serve, to accompany and to heal. The legacy of faith in action at Visitation deepens every year. Bless you for your generosity and commitment!

Peace,

A handwritten signature in blue ink, appearing to read "Fr. Greg".

Fr. Greg

Our Faith in Action

For 115 years, Visitation has been a stronghold of faith for Catholics in our neighborhood. As a community, we worship together, pray together, learn together and serve together. We are happy to present these anecdotes and statistics as examples of our faith in action. We hope that the data, stories and pictures here will serve as a reminder of the ties that bind us to each other, as Catholics and as community.

✚ Visitation is a relatively young parish with nearly 54% of our registered parishioners under the age of 40. 39% of our parish households include children under the age of 18. Age demographics for our 1,442 households are as follows :

Ages 18 & under	26.6%
Ages 19-39	27.1%
Ages 40-65	29.3%
Ages 66 & over	13.7%
Age unknown	3.3%

✚ During the fiscal year ended June 30, 2024, 900 registered households gave a financial contribution to the annual appeal or the Capital Improvement Fund. Our contributors can be broken down into segments as follows:

Households giving under \$1,000	232 households	25.8%
Households giving from \$1,000 to \$2,499	240 households	26.7%
Households giving from \$2,500 to \$4,999	158 households	17.6%
Households giving from \$5,000 to \$7,499	103 households	11.4%
Households giving from \$7,500 to \$14,999	117 households	13.0%
Households giving over \$15,000	50 households	5.5%

✚ During 2023-2024, planning resumed for a 2-phase school renovation/expansion project. Following the release last fall of the results from our feasibility study, our architectural firm (Hollis + Miller) and fundraising consultant (Rozanne Prather Consulting) worked with Fr. Greg and key staff members to present our project to Bishop Johnston and the Diocesan Building Commission for approval. We received diocesan approval in late April and our building committee resumed regular meetings to complete the design development for Phase I. The committee also interviewed applicants and selected Newkirk Novak Construction Partners as general contractor. We will complete design plans this fall and a capital campaign will kick-off shortly thereafter. Phase I is an extensive renovation of the current school with a couple of key enhancements. Construction for Phase I is expected to take place in the summer of 2026. After Phase I is completed, we will begin planning and fundraising for Phase II which is an addition on the north side of the current school building.

✚ At their St. Patrick's Day luncheon, our Visitation Golden Shamrocks (seniors) filled Easter eggs that were provided to our Mothers of Young Children for their Hop into Holy Week egg hunt.





✝ Faith Families are a special part of Visitation School. Students are grouped into “families” with a faculty member and students from various grades. Once a month, Faith Families sit together at all-school Mass and meet together to participate in a variety of activities. Faith Families allow students the opportunity to make friends across grade levels which, in turn, strengthens our school and our parish community.

✝ Visitation was one of two parishes in our diocese to host a Diocesan-wide Listening Session for the Interim Phase of the worldwide Synod. Reports from those sessions were sent from our diocese to the U.S. Conference of Catholic Bishops who sent data from dioceses across the United States to the Vatican. Learn more at <https://www.synod.va/en.html>

✝ We always enjoy having Visitation School alumni join us for Mass when they are having a reunion. This group of classmates from the Class of 1983 celebrated their 40th reunion in August 2023. Do you recognize anyone?



✝ Visitation began offering Christ Renews His Parish retreats in 2013. The Christ Renews program continues to bring together diverse groups of parishioners and unite them in community through retreats and ongoing formation. Currently, Men’s Team #14 and Women’s Team #15 are preparing to lead our next retreats in March 2025.



✝ One of the easiest ways to help those in need in our community is by bringing non-perishable food items when you come to Mass on the weekend. Donations to our narthex food basket are shared with the food pantries at Bishop Sullivan Center, Guardian Angels, Redemptorist and St. Francis Xavier.

✝ Visitation School students turned in over 5,200 service hours during the 2023-2024 school year. Each student turning in hours received a School of Stewardship certificate recognizing their service. In addition, students participated in grade-level and school-wide projects including collecting coats and winter items for refugees, homeless and others in need in our city; assembling hygiene kits for Morning Glory Ministries; decorating holiday placemats for Bishop Sullivan Center and filling goodie bags for the residents of the Veterans Community Project.

✝ Visitation boasts hundreds of volunteers who assist the parish in a myriad of ways. From the liturgical ministers and musicians who serve at weekday and weekend Masses and the ministry team members who advise and support our Pastor and parish staff to the committee members who coordinate our dozens of ministries and the workers who are always ready and willing to help, we are truly grateful to each and every one of you who help our parish put our faith into action. Thank you!

*“THE CHURCH IS NOT A RELIGIOUS COMMUNITY OF WORSHIPPERS OF CHRIST
BUT IS CHRIST HIMSELF WHO HAS TAKEN FORM AMONG PEOPLE.”
- DIETRICH BONHOEFFER -*

Images of Our Faith in Action



Visitation's Commitment to the Poor

July 1, 2023 - June 30, 2024

Since 1975, Visitation has proudly committed a percentage of our overall parish budget to assistance the poor and marginalized. By allocating this annual support, we fulfill that part of our mission that calls for us to be aware of and responsive to the needs of our neighbors and society. During the 2023-2024 fiscal year, our Social Concerns Team apportioned \$191,476 in funding in the following ways:

Emergency Assistance Fund

Our Emergency Assistance Fund provided \$56,400 to 17 parishes and agencies who provide emergency support to individuals or families in need and are located in areas with greater needs than those in our immediate vicinity. These contributions help the organizations deliver assistance with food, rent, utilities, transportation, medical expenses, clothing and other daily needs.

Bishop Sullivan Center-Troost	\$3,600	Reconciliation Services	\$2,400
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. Monica Social Services	\$2,400
Journey to New Life	\$3,600	St. Therese Little Flower	\$4,800
Morning Glory Ministries	\$3,600	Seton Center	\$4,800
Our Lady of Peace	\$2,400	Troost 39	\$1,200
Redemptorist Social Services	\$4,800		

From St. Francis Xavier: "Your generosity is such a blessing to us. We continue to get calls daily from new neighbors in need of food and strive to meet their needs in healthy and generous ways. We honestly could not do all we do without the quarterly emergency grants we receive from Visitation. Thank you so much for continuing to help our neighbors in need. You are making a difference!"

From Holy Cross: "Every week we have all kinds of people walking into our doors asking for assistance. We had the case of a family that was about to lose gas service in the middle of January when it was very cold. The husband lost his job due to an accident. This accident put him behind on his utility payments, and thanks to God and your generosity, we were able to pay their gas bill. "

Parish Based Ministry Supplement

\$30,000 in funds was designated to assist St. Anthony, Our Lady of Peace and Holy Cross parishes to pay the salaries of lay ministers. These parishes serve growing immigrant populations in our city.

Emergency Assistance at Visitation

Visitation provided \$11,994.80 of emergency aid to families or individuals living within or near our parish boundaries. These dollars provided assistance for temporary shelter, transportation, food, rent, utilities, medical/dental bills, clothing and prescription medication.

Habitat for Humanity

Visitation Parish has a long history of working with Habitat for Humanity to build or renovate homes for those in need. We were able to add \$3,043.00 to a reserve account for Habitat for Humanity for future projects.

Community Garden

Visitation continues to partner with St. Francis Xavier Parish to plant, tend and harvest a garden located on the grounds of SFX. To support these efforts, \$41.00 was spent on seeds and plants for the Community Garden.

Community Grants

Lead to Read KC's mission is to help children build a brighter future through the gift of reading. The students served suffered tremendous learning loss during the pandemic, and Lead to Read remains committed to helping them catch up and keep up.

The Midwest Innocence Project aims to raise awareness and foster open conversations about wrongful convictions, empowering individuals to understand the complexities of the justice system and advocate for fair outcomes.

Our Social Concerns Ministry Team allocates monies for small grants to local agencies whose programs address areas of concern including life, poverty and justice issues falling within the scope of Catholic Social Teaching. The Team reviews the grant proposals, visits the organizations and allocates the funds. This year, \$34,000 (34 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

Medical/Mental Health: Brain Injury Association, Care Beyond the Boulevard, Duchesne Clinic

Youth and Education: Cristo Rey High School, The Family Conservancy, Fire Foundation, Office of Hispanic Ministry - Diocese KCSJ, Sheffield Place

Literacy Tutors: Keeler Women's Center, [Lead to Read](#), The Learning Club

Emergency Assistance: Morning Glory Ministries

Housing: Community LINC, ReStart

Reintegration Support: Companions in Chillicothe, Journey to New Life

Wrongful Incarceration: [Midwest Innocence Project](#)

Veterans Support: Veteran's Community Project

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

Food Insecurity: Kanbe's Markets, Pete's Garden

Senior Ministry: Jeanne Jukan Center/Little Sisters of the Poor, Shepherd's Center

Migrant Aid: Migrant Farmworkers Assistance Fund

Advocacy for Peace/Non-Violence: Center for Conflict Resolution, Jerusalem Farm, KC Mothers in Charge

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

Sister Parish—Santa Maria Madre de Los Pobres

Visitation has nurtured a sister parish relationship with Santa Maria Madre de los Pobres in San Salvador, El Salvador for over 3 decades. We walk with them in prayer and action. Each year, we provide financial support for Madre's early childhood program, medical clinic and other ministries. This year, we allocated \$38,295.16 to support the CAPI, Madre's early childhood program.

Our parishioners have the opportunity, through the child sponsorship program, to support a child from the Madre community with a \$300.00 annual contribution that helps to provide school supplies, uniforms and medical care for the child until they complete grade school. Visitation families currently sponsor 80 children.

Visitation sent two delegations to our sister parish in El Salvador during this fiscal year. In September, 8 representatives of our parish community, including medical professionals, traveled to host a medical clinic. Donations of over the counter medication from Visitation were distributed at no cost if prescribed by one of our medical providers. While the delegates were there, the El Centro Escolar Catolico, or the CAPI, which is the school on the campus of our sister parish, celebrated its 38th anniversary.

In May, 6 delegates represented our parish at the 40th anniversary of Santa Maria Madre de los pobres! The week was filled with festivities and planned activities such as Mass, Mariachi and prayer processions. It was in 1988, 36 years ago, that Visitation parishioners voted to enter into this dynamic walk in solidarity and friendship with them.



"IN TEACHING US CHARITY, THE GOSPEL INSTRUCTS US IN THE PREFERENTIAL RESPECT DUE TO THE POOR AND THE SPECIAL SITUATION THEY HAVE IN SOCIETY: THE MORE FORTUNATE SHOULD RENOUNCE SOME OF THEIR RIGHTS SO AS TO PLACE THEIR GOODS MORE GENEROUSLY AT THE SERVICE OF OTHERS."
 - ST. PAUL VI -

Visitation Refugee Assistance Committee (VRAC)

In July of 2023, the Visitation Refugee Assistance Committee welcomed a new family to Kansas City from a refugee camp located in Tanzania. Every inch of their new household was filled with items donated by Visitation parishioners. The new family first slept in Kansas city in a space filled with food, furniture and even toys for the kids! Transitioning from a refugee camp into a modern city with so many new customs proved to be challenging at times, but with the wonderful commitment of our community, the family is now fully connected and established. Thank you for helping with this important work!



Miscellaneous

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

Keeler Women's Center	\$2,000.00	Emergency housing
Mother's Refuge	\$2,000.00	
Alexandra's House	\$3,000.00	Burial assistance
Veteran's Community Project	\$5,000.00	Furnish a tiny home
Little Sisters of the Poor	\$3,000.00	Incontinence supplies
Guadalupe Center	<u>\$2,000.00</u>	Housing support for asylum seekers
Total	\$17,000.00	

Additional social concerns expenses included \$300.00 to Bread for the World for membership dues and \$402.00 for miscellaneous supplies.

A testimonial from a current Mother's Refuge resident:
"Mother's Refuge has helped shape my life. This program has pivoted the way that I think and act as a woman. It has helped me consider who I really want to be and the life that I want to build for my daughter and I."

From Veterans Community Project:
"Your donation profoundly impacts our mission, allowing us to make a real difference in the lives of Veterans. Your gift serves as a reminder that change and growth are possible. Our middle name is Community; we believe in the strength of a united community. Your dedication exemplifies the power of individuals to effect change, and we consider you a vital part of our community."

Visitation Parish Vital Statistics 2023-2024

Registered Households	1,442	Baptisms	60
Visitation School Students 2023-24	447	First Communions	48
School of Religion Students	42	Confirmations	51
RCIA Participants	6	Marriages	17
		Deaths	24

Annual Financial Report

Highlights for Fiscal Year 2023-2024

Our primary fiscal goal was to manage our operating budget of \$5,373,930 to a breakeven level or better, utilizing a 3-year average contribution model. At the same time, we increased our long term Capital Improvement fund by \$256,809, thanks to parishioner gifts and market gains. Two withdrawals were made from the Capital Improvement Fund this year to cover the installation of new turf in the school amphitheater and the replacement of the fire panel at the school.

Total Operating Income for 2023-24 surpassed our income goals. Contribution Income increased by \$232,789 compared to the prior year, and was \$194,174 higher than our budgeted 3-year average. Education (tuition & fees) income exceeded budget by \$39,778 and Other Income, which includes Facility Rental, Interest Income, Ministry & Program Fees and Miscellaneous Contributions, surpassed expectations by \$55,085, allowing Operating Income to exceed budget by \$330,882.

The parish's operating expenses for both the church and school exceeded budget by 4.8% or \$259,841, resulting in an operating surplus of \$71,040.

Extraordinary Income, which includes designated Capital Improvement Fund contributions as well as undesigned memorial gifts and bequests are not reflected in operating revenue. These donations exceeded budget by \$5,163 this year, increasing our Total Income for the fiscal year to a surplus of \$91,203 when compared to budget. However, extraordinary expenses for the projects mentioned above totaled \$118,343 creating a Total Parish Net Loss for 2023-24 of \$27,139.

Your support makes this possible and we thank you very much.

Year Ending June 30, 2024

Total Operating Income

Our budget is developed citing four basic sources of income:

Contribution Income - Contributed revenue totaled \$4,370,158 or 76.6% of parish operating income. Contribution income includes parishioner pledge payments, Sunday and holy day offertory collections and donations from parishioners who did not make a pledge.

School Tuition and Fee Income - School Tuition and Fees Income amounted to \$587,878 or 10.30% of total operating income. In 2023-2024, this revenue category funded 16.96% of total school expense. This category is made up of the following items: Tuition payments—\$221,603; Adjusted tuition—\$163,100; Enrollment Fees—\$170,900 and After Care receipts—\$32,275.

School/Church Fundraising Income - School fundraising in this category includes the annual auction, flower sale and trash bag sales. In addition, we record contributions designated for specific programs or materials. School Fundraising income accounted for \$478,588 or 7.5% of total operating income, funding 12.3% of school expenses. Church fundraising income was \$92,395 for a total fundraising income of \$570,983, or 10% of total income.

Other Income - Other Income includes fees that parishioners pay for certain parish activities such as School of Religion, Confirmation preparation, etc. In addition, revenues from facility rental, interest income, Mass stipends and candle donations are part of this category. Other Income generated \$175,793 or 3.1%.

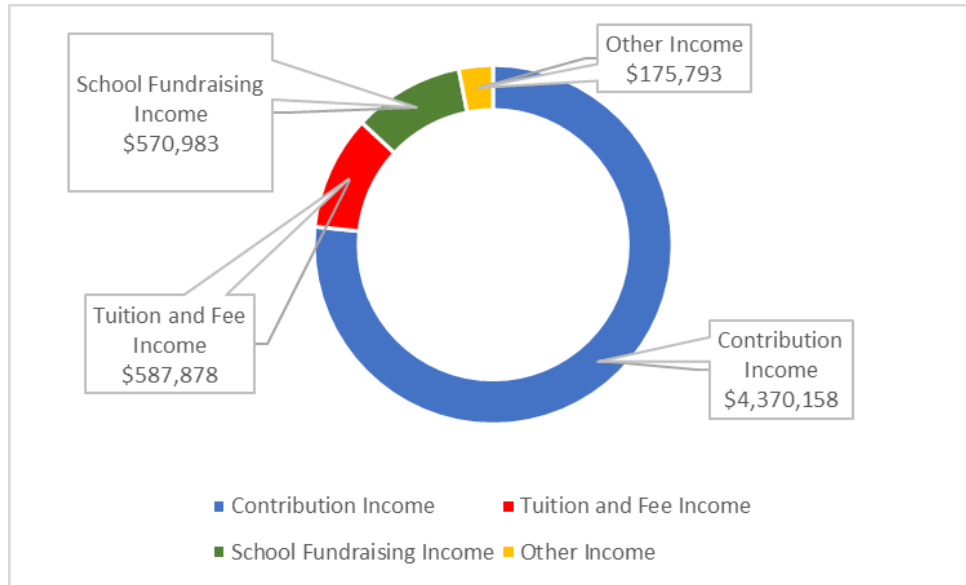
Visitation by the Numbers

291 The number of meetings scheduled on our parish calendar in 2023-2024

5,887 Number of gifts to the parish annual appeal during the 2023-2024 fiscal year that were made via credit/debit card, ACH or PayPal through the parish's electronic giving system

48.4 Percentage of registered parish members who are male

The chart below illustrates the main categories of operating income received during the 2023-2024



Total Operating Expense

Operating expenses for 2023-2024 were classified as follows:

School Ministry – Visitation School is the largest ministry of our parish which remains committed to providing a quality Catholic education for our parish children. During 2023-2024, the school served 447 students from 245 parish families. School expense totaled \$3,466,985 or 61.5% of total parish operating expense and included staff salaries and benefits, textbooks, classroom supplies, technology, furniture and equipment, educational resources and field trips. Facilities expense for the school building is included in the above amount and was \$462,452 or 13.3% of the total school expense.

Church Facilities – Facilities expense includes custodial salaries, utilities, repairs & maintenance, janitorial supplies, facility enhancements, lawn care, snow removal, security expense, etc. The facilities expense for the church building, offices and priest residence was \$472,776 or 8.4% of total operating expense.

Administration – Administration is the ministry which pledges appropriate management of parish resources. This category includes salaries for management and support staff, as well as property and casualty insurance, stewardship expenses, printing, postage, website & communications, offertory envelopes and event costs. Administrative expenses were \$687,751 or 12.2% of total operating expense.

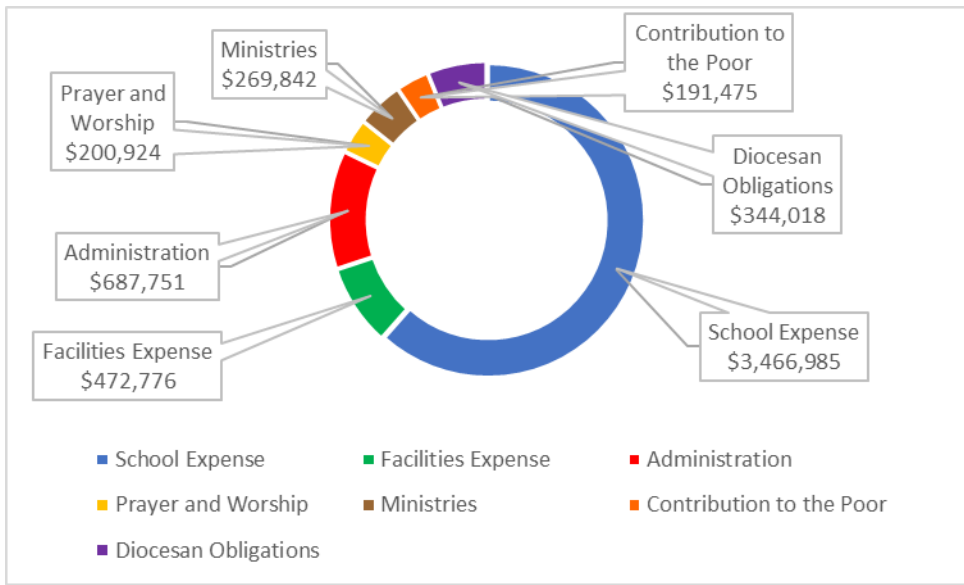
Prayer and Worship – Prayer and Worship is integral to our life as a faith community, nourishing and shaping every parishioner. Expenses include the costs associated with the celebration of weekday, weekend and holy day liturgies at Visitation: organists, musicians and substitute priests; art and environment appropriate to the season; candles; communion supplies and all other items necessary to celebrate the Eucharist. In 2023-2024, total expense for Prayer and Worship was \$200,924 or 3.6% of total operating expense.

Pastoral Ministries – Visitation parishioners participate in and utilize a number of parish ministries. This expense area includes sacramental preparation, adult faith formation, School of Religion, RCIA, Senior Ministry and related programs. In addition, this budget supports the vital work of Pastoral Care: ministry to families in times of illness or death, as well as outreach to those who are hospitalized and homebound. The cost for providing these ministries at Visitation for 2023-2024 was \$269,842 or 4.8% of total expenses.

Contribution to the Poor—For nearly 50 years, Visitation has committed to tithing a portion of our contributed revenue to help those in need – either directly or through agencies. These funds are managed by our Social Concerns Ministry Team. Included in the pages of this annual report are three pages titled *Visitation’s Commitment to the Poor* which detail how these monies are distributed. The formula used for our Contribution to the Poor is: Contribution Income minus Diocesan Assessment times 5%. In 2023-2024, the amount allocated by our Social Concerns Ministry Team represented 3.4% of our expenses at \$191,475.

Diocesan Assessment—All parishes in the Diocese of Kansas City-St. Joseph deliver financial support to the diocese by providing a certain portion of our revenue to the diocese. The diocese requests an amount equal to 9.25% of our total prior year income less half of prior year school expense. The amount allocated for this diocesan assessment in 2023-2024 was \$344,018 or 6.1% of total expenses. Our total assessment expense also included an assessment of 2.0% of total prior year income minus 100% of school expenses to support Catholic education throughout the Diocese.

In the following graphical presentation of 2023-2024 results, expenses are grouped into functional or ministry areas. The results for each area include all associated salaries, benefits and operating expenses.



Capital Projects Fund Results for 2023-2024

Contributions to the Capital Improvement Fund totaled \$20,163. These contributions were placed on deposit in the Visitation Capital Improvement Investment Fund housed at the Greater Kansas City Community Foundation in the month following the donation. For the fiscal year 2023-24, the deposit of these funds helped to bring the fund balance to \$2,415,484

There were extraordinary capital expenses of \$118,343 during the 2023-2024 fiscal year. A new fire panel for our school was purchased and installed which also included replacement of all smoke detectors and pull stations. In addition, a new turf surface was installed on the school outdoor amphitheater. Both of these projects were paid for by funds withdrawn from the Capital Improvement Fund.

A VISITATION BY THE NUMBERS QUIZ—HOW CAREFULLY HAVE YOU READ?
Match the number on the left with the definition on the right.

1. \$ 472,776	a. Extraordinary expense in 2023-2024
2. \$ 4,370,158	b. Church facilities expense in 2023-2024
3. \$ 118,343	c. Contribution income in 2023-2024

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

Prior Year Results and Budget for 2024-2025

	2020/2021 Actual	2022/2023 Actual	2023/2024 Actual	2024/2025 Budget	% Increase (Decrease)
Operating Income					
Contribution Income	\$ 4,280,688	\$ 4,137,369	\$ 4,370,158	\$ 4,419,725	1.1%
Tuition and Fee Income	\$ 486,956	\$ 491,456	\$ 587,878	\$ 747,285	27.1%
School Fundraising Income	\$ 334,806	\$ 551,981	\$ 570,983	\$ 705,550	35.9%
Other Income	\$ 145,960	\$ 195,604	\$ 175,793	\$ 169,551	-3.6%
Total Income	\$ 5,248,410	\$ 5,376,410	\$ 5,704,812	\$ 6,042,111	0.05%
Operating Expense					
School (including school facilities)	\$ 3,268,105	\$ 3,323,854	\$ 3,466,985	\$ 3,826,234	10.4%
Parish Operating Expenses					
Facilities Expense	\$ 342,512	\$ 443,830	\$ 472,776	\$ 462,096	-2.4%
Administration	\$ 683,003	\$ 679,487	\$ 687,751	\$ 660,660	-6.6%
Prayer and Worship	\$ 163,554	\$ 173,833	\$ 200,924	\$ 175,171	-3.0%
Ministries	\$ 249,226	\$ 272,632	\$ 269,842	\$ 286,387	6.1%
Contribution to the Poor	\$ 192,896	\$ 195,042	\$ 191,475	\$ 198,441	3.6%
Diocesan Tithe	\$ 381,324	\$ 317,111	\$ 344,018	\$ 433,122	25.9%
Subtotal Parish Operating Expenses	\$ 2,012,515	\$ 2,081,935	\$ 2,166,787	\$ 2,215,877	2.3%
Total Expenses	\$ 5,280,620	\$ 5,405,789	\$ 5,633,771	\$ 6,042,111	7.2%
Operating Income (Loss)	(\$ 32,210)	(\$ 29,379)	\$ 71,040	\$ -	
Capital Project Income					
Capital Improvements Contributions	\$ 132,686	\$ 137,641	\$ 7,595	\$ 6,800	
Donations/Memorials/Bequests	\$ 4,518	\$ 328,481	\$ 12,568	\$ 8,200	
Total Capital Project Income	\$ 137,204	\$ 466,122	\$ 20,163	\$ 15,000	
Capital Project Expense					
Deferred Diocesan Assessment	\$ -	\$ -	\$ -	\$ -	
Extraordinary Expenses	\$ 111,805	\$ 143,136	\$ 118,343	\$ 15,000	
New Construction/Major Renovation	\$ -	\$ -	\$ -	\$ -	
Total Capital Project Expense	\$ 111,805	\$ 143,136	\$ 118,343	\$ 15,000	
Capital Project Income (Loss)	\$ 25,399	\$ 322,987	\$ (98,180)	\$ -	
Total Net Income (Loss)	\$ (6,811)	\$ 293,607	\$ (27,139)	\$ -	-100.0%

2024-2025 Budget Highlights

Our budget is divided into two major segments—Operating and Capital Projects. The Operating budget supports the every day operations, allowing us to provide our parishioners with the ministries and activities expected of a large, vibrant parish.

Contributions received into the Capital Projects segment are deposited into the Capital Improvement Fund and extraordinary expenses for building, repairs and maintenance are shown in the Capital Projects segment whether or not funding is withdrawn from the Capital Improvement Fund.

Operating Segment

Our total operating budget for 2024-2025 is \$6,042,111. For many years, our budget process has allocated 55% of Contribution Income to support Visitation School. Our staff members prepare departmental budgets that are combined, then adjusted as necessary, to formulate a balanced operating budget for both the church and school.

After several years of budgeting income on a 3-year rolling average, our Administrative Ministry Team approved a contribution budget for the 2024-2025 fiscal year based on a 1.1% increase over the 2023-2024 actual contribution income to \$4,419,725. Other income is expected to decrease by 3.6% to \$169,551.

We utilize actual enrollment for the upcoming school year to budget school tuition and fee income. While our enrollment has decreased slightly due to a smaller incoming Kindergarten class than graduating 8th grade, an increase in enrollment fees and additional tuition students result in a projected budget of \$747,285, a 27.1% increase over 2023-2024. Fundraising Income in 2024-2025 is budgeted to increase by 35.9% from \$518,938 to \$705,550

In total, our budgeted operating income for 2024-2025 is higher than the prior year actual receipts by 6.9% or \$389,299.

To further explain our financial picture, we offer this more functional breakdown of budgeted expenses for 2024-25 budgeted expenses. Discussing the data in this way discloses that many of our expenses are “fixed,” allowing a relatively small part of the total budget to be utilized for discretionary spending.

Salaries and benefits— Personnel expense for the school is projected at \$3,037,165, an increase of 13.4% over 2023-2024 and representing 79.47% of budgeted school expense. We have 47 full-time and 11 part-time school employees on our payroll. Personnel expense for the church is budgeted at \$813,439 or 36.7% of budgeted church expense. There are currently 9 full-time and 2 part-time church employees. Salary and benefit plans for all personnel are set by the Diocese and individual wages fit within a scale for a particular job function. Total parish salaries and benefits account for 63.7% of all budgeted expenses at \$3,850,603.

Facilities Expense—Our parish Facilities expense is budgeted at \$891,626 or 14.8% of the total parish expense budget, with the school accounting for \$528,902 and the church \$362,724. Facilities Expense can be further broken down into 4 categories:

1. Repair and Maintenance—This category includes expenses for building/equipment maintenance/repairs, groundskeeping and all necessary supplies including paper products, cleaning products, etc. It does not include the expense for maintenance and custodial staff which is included in Salaries and Benefits above. The total parish wide budget for 2024-2025 is \$367,756 or 41.2% of total facility costs.

2. Utilities—Electricity, water, gas, telephone, and internet services represent \$323,269 or 36.3% of total parish facility expense.

3. Technology—This category includes maintaining computer hardware, new hardware and software purchases, leasing and supplying copiers and printers, accounting for \$147,001 or 16.5% of the total facilities budget.

4. Other — This category includes security and other related expenses at a budgeted cost of \$53,600 or 6% of total facility expense.

Diocesan Obligations—As discussed earlier in this report, the parish pays an assessment to the diocese to help fund the many services and programs that diocesan offices provide. Over the past year, our parish has utilized the expertise of many diocesan offices including Human Resources, Accounting/Finance, School, Office of Worship and Construction Management. To fund these services, parishes are assessed 9.25% of total prior year income minus one half of school expenses. This assessment totals \$433,122. Visitation’s total Diocesan obligations are \$746,231, representing 12% of the Parish budget.

In addition, we pay the Diocese for insuring the buildings and their contents. The most recent insurance valuation of all campus buildings totals \$32,463,00. This valuation can be broken down as follows: Church Structure \$15,036,000; Parish Office \$1,175,000; Visitation School \$14,700,000; Priest Residence \$782,000 and Six-Plex \$770,000. 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 5.2%, or \$313,109, of the 2024-2025 budgeted expenses.

Contribution to the Poor—Through this allocation, we support numerous organizations which serve the needy. We base our giving on the following formula: Budgeted Contribution Income minus Diocesan Assessment times 5%. Based on this formula for the 2024-2025 fiscal year, we have allotted \$198,441 of expense for the church, or 3.3% of the total parish budget.

The four major functional expense categories discussed above total \$5,686,901 or 94.1% of our entire parish operating expense budget. The remaining \$355,300 of the budget must then support all other expenses including, but not limited to, liturgical supplies, office supplies, paper, postage, printing, music at worship services, celebration events, legal fees, banking fees, religious books and magazines, candles, and funeral meals to name just a few of the multitude of costs necessary to effectively operate the church and school.

Capital Projects Segment

All of the income received in this segment will be invested in the Visitation Capital Improvement Fund. Income from this segment consists of contributions made using the green capital improvement fund envelopes, undesignated memorial gifts & bequests and those designating donations to a longer term cause. For the 2024-2025 fiscal year, we have employed recent giving trends to project \$15,000 in total donations.

There are not significant expenses planned for large facility and maintenance projects for the year 2024-2025.

Need more information?

Thank you for taking the time to read this report. As always, we endeavor to give our parishioners a comprehensive look at what our parish stewardship achieved during the past year. We also wish to share notable memories of parish events, a handful of parish statistics and examples of how our work made a difference to those in need. We welcome your ideas to make next year’s report better!

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

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