

Willowdale Chapel - Benevolence Guidelines

Introduction and Purposes

The purpose of this document is to set forth the responsibilities of the Benevolence Team and the guidelines for discharging those responsibilities. It is not intended to cover all circumstances under which funds may be disbursed, only those which involve the Benevolence Fund. The purpose of the benevolence fund is to meet people's basic needs on a short-term interim basis.

Oversight and Accountability

The Deacons have ultimate responsibility and accountability for the Benevolence fund, and can make decisions to disburse funds from the Benevolence fund—subject to these guidelines. The Benevolence team has been developed to assist with reviewing requests and providing follow-up on those needs.

General Guidelines

The benevolence fund is intended as a source of last resort, to be used when the family or individual requesting assistance has explored all other possibilities of help from family, friends, savings, or investments. It is intended to be a temporary help during a time of crisis.

All requests are held strictly confidential.

Assistance from the benevolence fund is intended to be a one-time gift per year. In unusual circumstances, the Benevolence team may decide to help an individual or family more than one time a year or on an ongoing basis. However, under no circumstance is a gift from the benevolence fund to be considered a loan.

Those requesting assistance must also be willing to receive financial, family, or emotional counseling. The Benevolence team will not provide help to anyone who, in their estimation, will have negative or irresponsible behavior reinforced by financial help.

Those requesting help must be willing to give the benevolence team permission to follow up on any of the information provided to the deacons. The deacons will be sensitive to confidential issues.

Criteria

The stated purpose of the benevolence fund is to meet peoples' basic needs. Normally, these needs are defined as:

- Primary lodging (mortgage/Rent)
- Utilities (electric/water/gas/sewer/trash)
- Necessary medical services
- Basic transportation

Financial assistance for professional counseling will be considered if it is perceived that counseling would directly enable the individual to address a current financial situation. In most cases, this would be limited to an initial counseling appointment. Under special circumstances, additional financial help could be given.

Generally, assistance from the benevolence fund will be small amounts to help as many as possible. Individual team members may authorize payments up to \$250 without prior approval. Requests greater than \$250 and less than \$2500 need to be approved by the Deacon in charge of benevolence. Needs greater than \$2500 need to be approved by the Deacon Chairperson or at least two other Deacons in his absence.

Recipients

In order of priority, recipients of funds disbursed from the benevolent fund are at the direction of the benevolence Deacons and are as follows:

1. church members
2. regular attendees
3. members of the community
4. ministries and Christian agencies that serve people with the same needs as those which fit the criteria for assistance from the benevolent fund, but which provide services the church does not

We desire that all recipients have a personal connection to Willowdale Chapel.

Procedure for Disbursement

Source of Request

A Benevolence Request Form must be filled out by the person requesting help or by a member of the Benevolence team who is assisting the person in need. The team member taking the request will obtain references and contacts to collaborate the need.

Processing the Request

1. The Benevolence Request Form is returned to the team member.
2. In a meeting or by a telephone conference, the team member and recipient review the request. Typically a decision can be made at that point or quickly thereafter if additional review is needed.
3. The person making the request is informed of the decision.
4. Checks are written and disbursed by the church treasurer. As much as possible, checks from the benevolent fund will be payable to vendors, homeowners associations, etc., rather than to the individual requesting assistance.

Benevolence Q&A

- (1) Can an individual contribute (donate) money or possessions to Willowdale Chapel and ask that the money be dedicated or directed to a specific individual or family?

No. The church has one general fund where all of the church's expenses operate out of. Contributions designated for specified individuals are not tax deductible donations. Receiving such funds can cause a "not-for-profit" to lose their tax exempt status.

- (2) If a person donates money directly to an individual/family or directly pays a bill for an individual/family can Willowdale Chapel provide the person who made the donation a receipt?

No. The donation is not the responsibility of Willowdale Chapel.

- (3) Will Willowdale help members outside of our immediate congregation with benevolence?

The decision will have to be made on a case by case basis. The Benevolence Team will consider the person's particular situation, supporting documentation and the church's current financial situation.

- (4) Can any Pastor or Elder approve a member's benevolence need without going through the Deacon Team?

Any two leaders (Pastors, Deacons, Elders) can request payment for a benevolence need. The Deacon in charge of benevolence will only need to verify the funds are available and collect the information needed to generate payment. This is not meant to circumvent the due diligence of the Benevolence team and is intended to be used in situations where there are confidentiality issues only.

- (5) Can a person be denied benevolence by a Deacon team and if so what can that person do?

If after reviewing the person's financial need a Deacon denies a person/family benevolence from the church, that person/family can then approach the Deacon Chairman and all parties involved will meet and discuss the request before a final decision is made.