

## St. Peter the Apostle Antiochian Orthodox Church, San Dimas

<b>Policy Title:</b>	Benevolence Policy
<b>Effective Date:</b>	05/03/09
<b>Revised Dates:</b>	08/23/09, 12/13/09
<b>Approval Date:</b>	12/13/09
<b>Purpose:</b>	To establish guidelines and procedures consistent with our Orthodox faith and practice for collecting and disbursing funds to help those in need.

### **BACKGROUND**

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It has always been part of true faith and practice for God's people to give alms (benevolent donations and services) for those in need (Tobit 4:7-11; Prov. 3:3, 4, 30, 31; Matt. 25:31-46; Acts 10:1-2), especially fellow Christians (Gal. 6:10). In the New Testament church, the apostles were originally responsible for benevolence. They would receive funds for this purpose, and then disburse those funds to those in need within the Church (Acts 4:32-36). This responsibility was soon delegated to deacons serving on behalf of the apostles and bishops (Acts 6:1-7). In addition, as the church grew, priests (elders/presbyters) were appointed to represent the apostles and bishops, including in the ministry of benevolence (Acts 11:27-30). In keeping with our ancient faith and practice, our parish provides benevolence to those inside and outside the Church.

#### **General Benevolence**

The General Benevolence Fund is part of the parish's general budget. These funds are used to help those in need who are outside our local parish. The Parish Council along with the parish priest administers these funds.

#### **Household of Faith Fund**

The Household of Faith Fund (Gal 6:10) is separate from the general budget and all other church funds. These funds are used to help those in need who are within our local parish. To ensure confidentiality, the parish priest exclusive of the Parish Council administers these funds.

### **RULES**

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#### **IRS Restrictions**

- Donations to the benevolence funds cannot be designated either explicitly or implicitly for a specific individual or family; donations must be general in nature.
- Donations given for the purpose of helping a specific individual or family are NOT tax deductible whether or not the donation was made in response to a request for assistance.
- The benevolence funds cannot be used to help the priest, the parish council officers, or those responsible for administering the benevolence funds.
- The priest, the parish council officers, and those responsible for administering the benevolence funds are prohibited from making tax-deductible contributions to the benevolence funds based on knowledge of a particular recipient's need.
- Monies in the benevolence funds cannot be used for political purposes or personal benefit, and cannot be given to help any domestic or foreign organization not approved by the IRS as a qualifying charitable organization.

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### **General Benevolence**

- Donations to the General Benevolence account must be deposited and recorded by the Parish Council Treasurer in a manner consistent with the parish's Constitution, Bylaws, and financial policies.
- Requests for funds from the General Benevolence account must be submitted either to the parish priest or to a Parish Council member.
- All disbursements from the General Benevolence account must be recorded and reported by the Parish Council Treasurer in a manner consistent with the parish's Constitution, Bylaws, and financial policies.
- Donations designated or marked "Benevolence" or "General Benevolence" will be deposited in the General Benevolence account.
- Financial assistance provided from the General Benevolence account cannot discriminate based on age, religion, national origin or ethnicity, race, genetics, gender, or sexual preference.
- Funds from the General Benevolence account may only be used to help those outside our local parish who qualify for assistance as defined in Appendix A.
- The amount given must not exceed the greater of one thousand dollars (\$1,000.00) or ten percent (10%) of the total funds available in the account at the time of the request.

### **Household of Faith Fund**

- Donations to the Household of Faith account must be deposited in a separate financial account distinct from all accounts used for church tithes, offerings, and donations. The Parish Council Treasurer shall oversee the deposit and recording of these funds in a manner consistent with the parish's Constitution, Bylaws, and financial policies.
- Requests for funds from the Household of Faith account must be submitted to the parish priest.
- All disbursements from the Household of Faith account must be recorded and reported by the parish priest in a manner consistent with the parish's Constitution, Bylaws, and financial policies with the following modifications:
  - Any disbursement from this account requires two signatures. In an emergency situation in which two signatures cannot be obtained, the parish priest may sign the check and the second signature may be waived, provided that a majority of the lay administrators approve the assistance along with the parish priest. The parish priest must maintain documentation of the lay administrator's approval.
  - The Parish Council Treasurer will not be involved with disbursements from this account, unless directed by the parish priest.
  - When reporting disbursements at parish council meetings and at the regular annual meeting of the Voting Membership, the parish priest must maintain the confidentiality of the fund's recipients by removing all personal identifying information included on the report prior to the report's disclosure.
- The priest shall select a minimum of two laypersons to assist him with administering the funds from the Household of Faith account. To qualify for this ministry, the individuals selected must be:
  - Voting Members of the parish who are in good standing as defined by the parish Constitution, Bylaws, and policies;
  - Persons of good repute who are trustworthy and respected by the parish membership (Acts 6:3; I Tim. 3:8-13); and
  - Willing to accept this responsibility without prejudice or desire for personal gain.

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- The identity of the lay administrators will remain anonymous, except for their signatures on the required financial records.
- Donations designated or marked “Household of Faith”, “Household of Faith Fund”, “HOF Fund”, “Priestly Benevolence” or similar will be deposited in the Household of Faith account.
- Funds from the Household of Faith account may not be moved to the General Benevolence account without the donor’s written permission.
- Funds from the Household of Faith account may only be used to help those within our local parish who qualify for assistance as defined in Appendix B.
- The amount given must not exceed the greater of one thousand dollars (\$1,000.00) or ten percent (10%) of the total funds available in the account at the time of the request.

### GUIDELINES

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- The form in Appendix C should be completed for any monetary disbursement from either benevolence fund.

#### General Benevolence

- Candle donations exceeding the actual cost of the candles are deposited in the General Benevolence account.
- Funds from the General Benevolence account may be moved to the Household of Faith account at the discretion of the Parish Council.
- The submission of a request does not guarantee a disbursement of funds. The parish priest and Parish Council reserve the right to decline disbursement if it is determined that it would be unwise to honor the request for any reason consistent with this policy and Attachment A.

#### Household of Faith Fund

- Disbursements from the Household of Faith account may be given either as interest free loans or as gifts.
- The submission of a request does not guarantee a disbursement of funds. The parish priest reserves the right to decline disbursement if it is determined that it would be unwise to honor the request for any reason consistent with this policy and Attachment B.
- At the priest’s discretion, recipients requesting financial assistance may be required to make good faith efforts, such as the following:
  - Obtain career or financial counseling.
  - Obtain job outplacement or research assistance.
  - Submit to temporary oversight of their finances.
  - Create an action plan outlining a more permanent resolution to their financial situation.
  - Provide evidence of efforts made to avoid or remedy their current financial situation.
  - Similar actions designed either to minimize the duration of the current financial crisis or to help avoid future financial crises.