

St. Peter the Apostle Antiochian Orthodox Church, Pomona

Policy Title:	Benevolence Policy
Effective Date:	May 3, 2009
Revised Dates:	08/23/09, 12/13/09, 01/10/15, 04/25/2020
Approval Date:	
Purpose:	To establish guidelines and procedures consistent with our Orthodox faith and practice for collecting and disbursing funds to help those in need.

BACKGROUND

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. Historically, this has been accomplished through two different funds: Benevolence and Household of Faith. The Parish Council decided to merge these two funds into one Benevolence Fund. They also established a standing Benevolence Committee to administer this fund.

RULES

IRS Restrictions

- Donations to the benevolence fund must be general in nature; they cannot be designated either explicitly or implicitly for a specific individual or family.
- Donations given to help a specific individual or family are NOT tax deductible whether or not the donation was made in response to a request for assistance.
- The parish clergy, the Parish Council members, and those responsible for administering the benevolence fund are prohibited from making tax-deductible contributions to the benevolence fund based on knowledge of a particular recipient's need as this can be construed as a conflict of interest and an attempt to circumvent the IRS restriction on having tax deductible donations designated for a specific recipient.
- Monies in the benevolence fund cannot be used for political purposes or personal benefit.
- Monies in the benevolence fund cannot be given to help any domestic or foreign organization not approved by the IRS as a qualifying charitable organization.

Donations & Transactions

- Donations to the Benevolence Fund must be deposited and recorded by the Parish Council Treasurer in a manner consistent with the parish's Constitution and financial policies.

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- Donations designated or marked “Benevolence” or “Household of Faith” will be added to the Benevolence Fund.
- Requests for funds from the Benevolence Fund must be submitted to a Parish Council member or clergy person.
- All disbursements from the Benevolence Fund must be recorded and reported by the Parish Council Treasurer in a manner consistent with the parish’s Constitution and financial policies.
- Financial assistance provided from the Benevolence Fund cannot discriminate based on age, religion, color, national origin or ethnicity, race, disability, citizenship status, genetic information, or sex.
- Funds from the Benevolence Fund may only be used to help those who qualify for assistance as defined in this policy.
- Funds from the Benevolence Fund may not be given to a company or organization, except to help an individual with a financial need as defined in this policy.
- The amount given shall be at the discretion of the Parish Council Benevolence Committee.
- The submission of a request does not guarantee a disbursement of funds. The Benevolence Committee 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, limitations of the fund reserves, or pastoral consultation.

Benevolence Committee

- In accordance with the Parish Constitution, Article VI, Section 4, Paragraph F, the Parish Council established a standing committee called the Benevolence Committee to administer the Benevolence Fund under the oversight of the Parish Council.
- According to the Parish Constitution, Article VI, Section 4, Paragraph F, the Parish Council Chairman appoints all members of this committee from the Voting Membership of the Parish after consultation with the Pastor and other members of the Parish Council. The Chairman also designates the Chair of this committee.
- The members of the Benevolence Committee shall consist of the following members subject to the consent of the Pastor and Parish Council:
 - One or two Parish Council members
 - One member of the parish clergy (i.e., priest or deacon)
 - One or two members from the Voting Membership
- To qualify for this ministry, the individuals appointed must be:
 - Voting Members of the parish who are in good standing as defined by the parish Constitution 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.
- The Benevolence Committee shall submit a monthly report of its activities at regularly scheduled Parish Council meetings and a report when requested by the Parish Council Chair or Treasurer.

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Recipient Qualifications

- The recipient must meet the following qualifications:
 - Has not been known to misuse benevolence previously provided.
 - Has followed any “good faith” efforts recommended by the parish priest or the Benevolence Committee.
 - If a regular attendee of St. Peter the Apostle Antiochian Church of Pomona, expresses a willingness to serve or give back to the parish community as determined by the Benevolence Committee and consistent with this Benevolence Policy.
- The recipient must be willing to answer all questions asked by the Benevolence Committee related to the request for assistance.
- At the Benevolence Committee’s discretion, recipients requesting financial assistance may be required to make good faith efforts, such as, but not limited to, 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.

GUIDELINES

Donations & Transactions

- Profits from candle donations are deposited in the Benevolence Fund.
- Benevolence Fund disbursements may be given as gift cards, vouchers, coupons, checks payable to vendors, or the like as well as interest free loans.
- Benevolence Fund disbursements may not be given directly to an individual recipient in the form of cash or a check made payable to that individual.

Financial Need Qualifications

- The request must be for assisting with necessities such as:
 - Clothing
 - Groceries
 - Required medical services such as dental, emergency room services, hospitalization, vision, and prescription medicines
 - Shelter (rent or mortgage on primary place of residence)
 - Telephone payment on home or primary phone
 - Transportation costs (e.g., bus pass, vehicle fuel, or maintenance on primary vehicle) for the purpose of employment, medical care, or other required travel
 - Utility payment (electrical, gas, or water)
 - Employment assistance

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- The requested funds must not be used for expenses such as, but not limited to, the following:
 - Alcoholic beverages, cigarettes, illegal drugs, etc.
 - Business expenses, except when directly related to obtaining employment
 - Cosmetic or optional surgery and unnecessary or optional medical services
 - Discretionary or optional travel or transportation costs
 - Education, except when directly related to obtaining employment
 - Entertainment of any kind
 - Gambling
 - Recreational clothing and sports equipment
 - Secondary residences
 - Secondary vehicles
 - Voluntary activities