

BAYSIDE community church Benevolence SOP

Care Ministry exists at Bayside to offer help, hope, and support to people as they walk through various life experiences. We do this by:

- Knowing God
- Finding Family
- Living in Freedom and
- Discovering Purpose

Benevolence exists at Bayside to provide temporary assistance to participating members of our church family who find themselves in a financial crisis situation.

JOB DESCRIPTIONS

Campus Care Director - Reports to Campus Pastor, Senior Executive Pastors, and Lead Pastor

- To budget and steward the benevolence fund
- To assist members who qualify for benevolence
- To maintain administrative duties for this ministry

PURPOSE

The importance of having written policies and procedures for benevolence requests is critical for the following reasons:

- It clearly identifies what kind of assistance may be provided, in what situations it may be provided, and how it is to be provided.
- It establishes confidence within the church that funds are being distributed fairly.
- It uses the same standards for all applicants.
- It minimizes inappropriate requests and how we respond to them.
- It helps to avoid problems with the IRS, who can challenge a church's tax-exempt status due to questionable or undocumented receipts and disbursement of funds.

BENEVOLENCE

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- The benevolence fund is intended to be a temporary source of assistance that is requested during a time of crisis and after the individual or family has explored and exhausted all other possibilities for financial support (i.e. family, friends, savings, and/or investments).
- It's important to remember that every person's problem is a crisis to him or her, and that people who are asking for help deserve to be treated with kindness and respect that is befitting to the Lord.
 - However, though people need to be treated with tact and sensitivity, we must also remember that their problems are not our fault or our responsibility to solve; we can assist them in Biblical truths and pray for the individual and their needs.
- Under no circumstance is the benevolence assistance to be considered a loan, as we believe this practice would create an unhealthy barrier in the relationship of the individual and the church, and when assistance is offered, it is a *gift* and therefore without any expectation of repayment.
 - Individuals wishing to reimburse, may do so at their own discretion.
- Each request for financial assistance must be reviewed and processed by the Campus Care Staff, and if approved, the request will need to be finalized by the Care Resourcing Director. Then it will be submitted to the Campus Finance Department. Requests for benevolence will not be processed without the proper documentation and authorization.
 - Bayside reserves the right to check police records and will cooperate with the authorities in any ongoing criminal investigation.
 - Bayside does not provide cash, but will make a check disbursed to the biller.
 - Assistance from the benevolence fund should not exceed \$3,000 per person or family annually, including the \$500 allotted assistance for professional counseling and/or clinical services.
 - If there is a request that is over \$3,000, it must be signed by the Campus Pastor and a second signature by a Senior Executive or above.

PROCESS

- 1) Many calls come in on Friday afternoons and should be referred to the Pastor-on-Call.
 - He/she should follow step 2, then send all benevolence requests to the Campus Care Director before the following Tuesday morning.

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2) When a request for assistance is received by the Campus Care Director, the caller is asked the following:

- Check Planning Center first! See if the person does not exist in PCO.
 - Connect to Christian Care Alliance (941)752-4271 for Manatee, Sarasota, DeSoto, and Hardee county.
 - If Hardee county, connect to Hardee health center (863)773-0034.
 - Riverview, connect to local resources
- If the person exists in PCO then a Care workflow will need to be created.
- You will need to get their First name, last name, email address and phone number
- Ask “How can we help you?” (gather details about the request for assistance)
 - type of assistance requested
 - situation or circumstances of the caller not being able to afford it
 - amount of assistance requested
 - due date of the assistance requested
 - what he/she will do next month
 - how he/she can improve his/her finances
 - discuss the expectation of attending the Financial Peace group.

3) Verify if previous assistance was given and cross-reference with Planning Center Online and Christian Care Alliance.

- If previous assistance was given, is it the same type of assistance being requested now?

4) The Campus Care Director should consult the following information in determining if we will move forward with assisting a person and the applicant must score a minimum of 3 out of 5 points:

- Completed Growth Track and signed Membership Covenant ***Award 1 point**
 - Church attendance of at least 32 out of 52 weeks ***Award 1 point**
 - Tithing record obtained from accounting department, via email (givinghelp@mybayside.church). ***Award 1 point**
 - Involved in or prior involvement in a group ***Award 1 point**
 - Actively serving in a ministry. ***Award 1 point**
 - Access the Planning Center Online (PCO) database to review participation, involvement, etc....
 - Login to PCO. Go into PEOPLE and utilize the search bar at the top right of the screen.
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- Enter the individual's name.
 - Click on the appropriate tab on the left hand side of the screen
 - Check Activity to see if they are part of a small group, serving, registered for any events or have checked into an event.

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- Check Engagement to see when they first came to Bayside, when/if they made a decision for Christ, if they have signed the Membership Covenant, when/if they were water baptized - Note: This will also tell you if someone is on Staff - **if they are on staff it needs to be a Staff Benevolence.**
- Check Coursework to verify Growth Track completion, Freedom Weekend attendance, historical Growth Track attendance, Marriage weekend attendance, SYMBIS involvement, leadership training, ministry specific training and Financial Peace University completion
- Check the Leadership tab to see if they are a coach in any ministry area

5) If assistance is considered **appropriate**: a [benevolence application](#) and a copy of the bill will need to be provided, before any financial assistance will be considered. The person must provide a current budget and at least 2 pay stubs/proof of income.

- Ask the caller if he/she would like to come in and fill out an application, or if an emailed or mailed application is preferred.
- If the benevolence request is for professional counseling and/or other clinical services, determine with discretion (i.e. are they going to follow the Dr's advice for medication, etc.).
- We can also give gift cards (i.e. for Publix/grocery, gas, etc.)

6) If assistance is **denied**: refer the caller to an appropriate [local agency or resource center](#) for assistance. We also have our own business directory that they can be referred to. Our goal is to always find a "Yes". Community resources is a yes.

- We don't pay : phone bills, tax bills, credit cards or collection bills
- We do assist with: Basic needs: the four walls - food, shelter, utilities, rent/mortgage.
- In the past, Bayside has been featured on local area news shows. When this has happened, local families would see the church from their TV, then call Bayside for assistance.

7) If the Campus Care Director decides to proceed with the assistance, he/she will need to forward or email the following documents to the Care Resourcing Director for approval:

- Completed [Benevolence Check Request Form](#) This form is also online inside of Planning Center and can be sent directly to the member/attendee to complete digitally.
- Copy of the bill or invoice to be paid (with Supporting documents such as copy of the lease or mortgage statement).
- Completed Benevolence Application
- Completed Budget form. The Budget Form is also inside of Planning Center and can be obtained digitally.
- Copy of Tithe/giving report

8) The Campus Care director needs to enter the benevolence transaction into a Planning Center Online workflow:

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- Sign into PCO and look up the member
- Click Workflows on the left hand column
- If they have not already submitted a Care Request - click Add to Workflow - (your campus) Care Request
- Follow the workflow process for Care Requests
- Send the Benevolence application and “Make a Budget” form through email templates

9) The Care Resourcing Director will forward the approved benevolence request to the finance department for disbursement of funds to the payee.

- If there are any unexpected changes to the request of benevolence type, the finance department will handle the change.

10) The Care Resourcing Department will maintain a confidential spreadsheet of all benevolence transactions.

FPL

- For immediate needs, we can call FPL and request an extension without making a commitment, this give us time to investigate the member and determine if he/she meets criteria.
- If we are making a commitment, FPL will work with the member for 90 days without shutting the power off, and it generally takes 3-4 days to process the request.
 - An authorized user should call in the request (FPL has a list of authorized users) at 800-480-7927 or submit a commitment [online](#).
 - Users need to be authorized before he/she is able to utilize the online system.
 - State who you are, reason for the call, the member’s name, their account number, and the amount we are willing to commit to paying.
 - Send the payment in the green FPL envelope.
 - **Please make sure to notify Care Resourcing Director** when you do this as we have to finalize this through the portal or we lose our privilege to use it via FPL.

Christian Care Alliance (CCA)

CCA represents 270 churches. They make an assistance recommendation based predominantly on a thorough application. CCA helps local churches by informing them of Individuals who are going from church to church asking for donations, or may be running from other agencies.

HOW TO APPLY

- 1) The requestor would call (941) 752-4271 and leave their name, phone number, and an explanation of their need.
- 2) A CCA employee will call the applicant back and take an application over the phone (20 mins). Application hours are 9AM - 12PM and 1-4PM Monday - Thursday.

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3) The applicant's information will be verified by CCA and appropriate resources will be referred and recommended, including Bayside Community Church.

The Campus Care Director should contact CCA and ask them to send their fraud list/alerts to his/her email.

- It is recommended that he/she also keep some type of running document to keep a log of these individuals for future reference, if needed.

OTHER

- Legitimate needs that have been identified may be ignored and they may not be willing to work on them.
- Each ministry has their own fund (i.e. scholarships for retreats, etc.), and does not come out of the benevolence fund.
- We advise all of our staff to not pay out of their own pockets.

Benevolence Risk - Tow Companies

Benevolence Risk - Motels

1) No way to screen applicants or track motel monies received.

updated 3/1/23 VRS