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RECOMMENDED STEP-BY-STEP POLICIES AND PROCEDURES FOR SOCIAL SERVICE EFFORTS BY PHILOPTOCHOS METROPOLISES AND LOCAL CHAPTERS

GOAL OF THIS DOCUMENT: TO PROVIDE CONSISTENT, COMPASSIONATE, ACCOUNTABLE SERVICES

To ensure that the social service assistance provided by all levels of the Society are consistent, compassionate, accountable, and transparent, National Philoptochos encourages you to implement the policies and procedures outlined herein. Please review and discuss this document with your boards. At any point in time, feel free to contact your Metropolis Philoptochos President, Metropolis Social Service / Philanthropy Liaison, or National's Department of Social Services for assistance or guidance on a specific case or issue.

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FRAMEWORK FOR ALL PHILOPTOCHOS SOCIAL SERVICE ASSISTANCE TO INDIVIDUALS & FAMILIES:

- The Greek Orthodox Ladies Philoptochos Society, Inc. gives hope and rebuilds the lives of Orthodox Christian individuals and families, regardless of their immigration status, whose lives have been impacted by human service challenges including but not limited to poverty/ inadequate income; health, mental health, and substance use disorders; homelessness and hunger; intimate partner violence including elder abuse; family and older adult services and more.
- We are dedicated to helping those in need address and resolve their difficulties as best as possible so they may be able to manage on their own in the future.
- Our work is conducted within a faith-based, culturally sensitive context.

STEP ONE: CONFIDENTIALITY

- Most of the people who turn to us for help never thought they would have to ask anyone for help, let alone us. **PLEASE RESPECT THEIR PRIVACY.**
- Nevertheless, **CONFIDENTIALITY IS NOT ABSOLUTE:** While information shared with us must not be revealed, it is important that those seeking our help should be told who will know their name and situation, such as your social service point person/ liaison, and your chapter' president and treasurer – those who sign your Chapter's checks.

STEP TWO: OUTREACH / DEFINITION OF "SOCIAL SERVICES"

Although Philoptochos has existed for over 90 years, many people, including those within our community, may be unfamiliar with the scope of our services, so inform your local and broader community who you are and what you can do.

- **PLEASE NOTE:** Social services assistance means helping Orthodox Christian individuals / families in your own community who face human service and/or financial challenges. (Support of local nonprofit organizations, such as shelters, food banks, other, is NOT considered "social services". Such support is "philanthropy".)
- Create an outreach flier to post in your church/ distribute to parish ministries and community organizations. Suggested wording: "Has a loss of employment put you behind in your rent?" "Are you overwhelmed with out-of-pocket medical costs?" Include who and how the person can reach the appropriate person in your chapter for help.

STEP THREE: SOCIAL SERVICES “POINT PERSON” – who responds when someone reaches out for help.

Select one or two trusted Chapter members to be your Social Services “point person” who will contact those seeking help, interview them, and obtain the information needed to determine whether and how to help.

SKILLS/CHARACTERISTICS TO LOOK FOR IN YOUR “POINT PERSON”. *The person should be able to:*

1. Maintain **confidentiality**
2. Understand that the person seeking help is **under stress** and coping with a range of emotions related both to their situation and the need to reach out to you for help.
3. Be **non-judgmental**, kind and patient.
4. Show **compassion and empathy** – not pity. She must be able to lay sympathy feelings aside.
5. **Listen to and respond** directly to the stated concerns of those seeking help.
6. Offer **timely, clear, and consistent information** about what your Chapter can **and** cannot do.
 - Explain that your chapter will do its best to help, but there are procedures that you and they must follow.
7. **Discreetly** and **with sensitivity** ask for required documentation (see sample questions below).
8. **Keep their own values in check:**
 - It isn't helpful (for example) to say to a domestic violence victim, “Why haven't you left by now?” or to someone facing eviction, “Why didn't you budget better?” or “What did you think would happen?”

Does your reaction differ depending on WHY you believe the person is seeking help?
For example, do you respond differently to someone whose child is facing a life-threatening illness, as opposed to someone who needs help because you think they are a gambler or drug addict?

9. **Empower the person:** those facing a serious challenge likely feel they have little or no control over their lives. Help them gain some control over their situation by ensuring they participate in your decision-making.
 - For example, if the person presents you with several unpaid/ outstanding bills, say: “Since our resources are limited, would you please prioritize them? In which order should we consider them?”
10. Know when to say, “**I don't know, but I'll try to find out**”.
11. Understand that as a faith-based organization, part of our role is to **provide spiritual support**.
 - Let them know that their problems are **NOT** because God is punishing them or has abandoned them.
12. **Be sensitive to our cultural characteristics:** support their cultural strengths, consider barriers (*real or perceived*) to accepting help, e.g., *language, family/gender roles, religion and spirituality, not wanting to accept a referral to public benefits, etc.*
13. **Determine if supplemental assistance will be requested from Metropolis &/or National Philoptochos.**
14. **Know when it's time to ask others for help**
15. **Recognize “Vicarious Trauma”** – know when the effect of listening to other people's problems negatively affects your life: psychological, physical, spiritual well-being. Think about when it may be time to step back or step away.

STEP FOUR: WHY PEOPLE TURN TO US FOR HELP

Most of our clients did “*everything right*” to prepare for the future, but then something unexpected or unavoidable occurs that catapults or in some cases, slides them into difficulties, such as:

- **ECONOMY:** *Loss of employment; underemployment; end of benefits such as unemployment or disability benefits.*
- **DISASTER:** *Hurricanes, floods, earthquakes, fires, droughts, landslides, etc.*
- **FAMILY SITUATION:** *Divorce, abandonment, domestic violence, ‘dead-beat’ parent, death of breadwinner, etc.*
- **HEALTH / MEDICAL / SUBSTANCE USE DISORDER:** *Illness, disability of client or another family member.*
- **MENTAL HEALTH:** *Mental illness of client or family member; unable to follow through on (e.g.) recertification requirements to keep their public benefits; refusing medications because of side effects or stopping them because they “feel better” and think they are “cured”; depression that causes them to become immobile, etc.*

While the above reasons generally are viewed as “*acceptable*” reasons for someone falling into difficulties, we also have people who need our help because of:

- **JUDGMENT:**
 - *Sometimes, the path to good judgment is paved by a series of poor ones, and the “penalty” for poor judgment should not have to be (e.g.) homelessness. Try not to judge people unfairly because of your own values.*
 - *Part of our role can be to help the client learn / practice how to make better choices. For example, help them develop a budget to help them manage their limited income better to help them differentiate between “fixed” costs, such as rent, etc., and “variable” costs, such as lunches, entertainment, etc. that they can control.*
- **HABITUAL ASKER:** Those who look to others to “**rescue**” them, or whose “job” has become begging for help.
- **SENSE OF ENTITLEMENT:** Those who believe we **must** help them because we are Philoptochos.

NOTE: *If the person seeking your help is NOT from your community, contact your Metropolis Philoptochos to ask if they are known elsewhere – in or outside your Metropolis – and/ or if they have been helped before.*

STEP FIVE: THE PROCESS - APPLICATION FOR ASSISTANCE & CONSENT FOR RELEASE OF INFORMATION

- The **APPLICATION FOR ASSISTANCE** is an integral part of Philoptochos **documentation requirements**. It allows the person the opportunity to report, in their own words, how they hope you can help. As importantly, it provides the information needed to determine *whether and how* Philoptochos can help.
 - The Application can be completed by applicant, a family member or other designee, or, the interviewer.
 - If the form cannot be followed exactly, please obtain as much of the information included as possible.
 - A person who refuses or fails to complete and sign the application can be denied assistance.
 - We recommend that you ***leave a supply of applications in your Church office to be given to “walk-ins”***
- The **CONSENT FOR RELEASE OF INFORMATION** gives you permission to contact secondary sources, if needed, to verify information presented by the applicant from (e.g.) medical provider, landlord, utility, etc. It also allows you to refer them to other levels of Philoptochos, to longer-term organizations/ services better suited to meet their needs.
 - *Note: Even with this signed form, let the person know who you are contacting and why.*

What you will learn from the application:

- How they heard about you (*who referred them to you*).
- Their full name, contact and identifying information (*recent photo, date of birth, marital status, address, email, phone number*)
- Immigration status – we help regardless of immigration status, however, if the applicant needs ongoing help, we need to know if we can refer them to public benefits, entitlements, or other services, since eligibility for many are limited based on citizenship or permanent residency.
- Who else is in the household: names, relationships, ages, income, etc.
- Type of housing and monthly costs (*rental, owner, boarder, roommate, homeless/ street*)
- Household income (*of all in household; helps us examine short- and long-term budget; also, some benefits are income-based*)
- Household expenses (*provides picture of how they manage funds; are all household members contributing to expenses?*)
- Other help they have received, have requested, or are receiving *from other sources* – Philoptochos, public, private, nonprofit, other denominations, etc.; names of such sources, dates and amounts/ purposes, other services received.
- How they have managed “until now” and since we don’t have the resources to assist on an ongoing basis, how they plan to manage in the future.
- The specific help they identify as needing “now”.
- It asks the person to sign and date the form to certify the information is accurate and complete.

The application also asks whether:

- ***History of mental illness, and if the person wishes a referral for counseling.***
- ***History of substance use – what may appear as ‘poor’ budgeting could be a drug abuser stealing from their parent.***
- ***Firearms are in the household and if yes, how they are secured. This question is especially critical if there are children in the household, or if you suspect domestic violence.***

STEP SIX: THE INTERVIEW

Because many of the cases that come before National are from different parts of the country, we frequently conduct interviews over the phone; however, for local cases, we recommend face-to-face interviews. Much can be revealed by the person’s demeanor, physical state – have they eaten recently? Emotional state – do they seem anxious or depressed? Neatness, condition of clothing and whether seasonally appropriate, body language, eye contact, and items they are carrying with them, etc.

- The interview helps us find out the person’s primary “ask” and its underlying causes.
 - It lets the person describe how they reached their current situation, whether there was an event that led up to it, why they think it happened, and how they think / hope the problem will be resolved.
 - It also will reveal whether they have been in the same or similar situation before.
- When possible, conduct the interview with a second person – one to ask questions, the second to take notes.
- **LOCATION OF THE INTERVIEW**
 - If there is no private, suitable location in your church, go to a local coffee shop, restaurant, or park.
 - **DO NOT** invite the person into your home
 - **DO NOT** go by yourself to the home of someone you don’t know well
- **DIAL *67** – **If you telephone the person from your own phone, BLOCK your number from their Caller ID.**
- **STARTING THE INTERVIEW: Acknowledge the personal nature of the questions:**
 - *“I don’t mean be intrusive, but I am going to ask personal questions that we ask of everyone we try to assist so we can determine the best way to help you, so please answer as completely as you can”. AND*
 - *“Please know that what you tell me will remain confidential and will only be shared with your permission”.*
 - *If at any time the person becomes uncomfortable, STOP the interview, and ASK if you can continue another time.*

• **SAMPLE OPEN-ENDED QUESTIONS:**

- What has brought you to us today? Be sensitive – For many people, they never thought they’d need to ask anyone for help, let alone us.
- How long have you faced this situation (*or setback or challenge*)?
- Has something like this ever happened to you before? (*Even if the person seeks our help because of a recent diagnosis, this question is helpful to find out if their illness has recurred*).
- How have you managed up until now?
- Are there family or friends who can help or who have helped you in the past? If yes, who, how and when.
 - *Don't expect family/friends to be able or willing to help, as some have "used up" the good will of others.*
- Have you been helped by Philoptochos before? (*Chapter, Metropolis or National*).
- Have you reached out to other organizations (*public, private, nonprofit, union, another Orthodox Christian church, other denomination church*) for help either now or in the past? If yes, ask for details.
- Do you plan to seek help from any of these organizations again?
- What is the best way you think we can help you?
- **How do you plan to manage in the future?**
 - This is asked since we don't have the resources to provide ongoing help, and helping the person develop a "plan for the future" can be an important way to assist.

• **DO YOU NEED TO DIG A LITTLE DEEPER?**

Are there underlying reasons for needing help? Oftentime, these issues must be dealt with first. For example:

- *Is the woman asking for help to pay her childcare costs because she only can work part-time since she is the sole caregiver for her grandmother (or parent, or other) who suffers from dementia?*
- *Is the person seeking help finding another place to live doing so because s/he is a victim of domestic violence and needs to relocate to a safe environment, but is embarrassed to tell you?*
- *Is the substance user/ abuser self-medicating because s/he is depressed or suffers from another mental illness?*

• **REFERRALS TO OTHER SERVICES & RESOURCES**

Philoptochos compiled a document, entitled,
GUIDE TO FINDING LOCAL PROGRAMS, RESOURCES AND SERVICES
*to help you find appropriate local and broader resources in response to the array of
human service challenges faced by members of our community.*

Available on our website: www.philoptochos.org or by email: socialwork@philoptochos.org, or by telephone: 212.977.7782.

- Philoptochos cannot be the answer to all problems, nor can we provide ongoing, unlimited help. But we can assist people to understand the need to apply for and accept help from other resources such as:
 - *Public or private benefits and entitlements, housing options/ rent subsidies, domestic violence or homeless shelters, SNAP/ Food Stamps/ WIC, food pantries, soup kitchens, senior centers, dementia day programs and respite care, substance abuse resources, paratransit services, and more.*
 - If the person refuses such referrals, try to find out why:
 - **Are they "embarrassed"**, as are many people of Greek descent, to apply for what they see as "welfare"?
 - *If yes, suggest they look at such help as temporary. Let them know they can terminate the assistance as soon as they are back on their feet.*
 - Does their **limited English language** ability make it difficult to apply on their own?
 - *If yes, offer to go with them to negotiate the system, help them fill out forms, wait with them, interpret for them, or ensure the government office provides them with an interpreter.*
 - Is it because s/he is a **single parent** who cannot spend several hours or all day at a government office because of childcare responsibilities, or because they must pick up their children from school?
 - *If yes, ask her if she would like you to arrange to have someone she knows and trusts to stay with the child, or, pick them up from school.*
 - *Offer to pay for the childcare costs.*
 - *Offer to pay to place the child in an after-school activity that day.*
 - Is it because their past history with that government benefit is problematic, i.e., they failed to recertify in time, or were not truthful about income, family composition, etc. resulting in their benefits being terminated or held up until they paid back what was owed?

STEP SEVEN: WHEN THE NEED IS FINANCIAL

- **HELP TO INDIVIDUALS & FAMILIES: WHO PHILOPTOCHOS SOCIAL SERVICES FUNDS CAN HELP:**
 - **SOCIAL SERVICE FINANCIAL ASSISTANCE IS LIMITED TO ORTHODOX CHRISTIAN INDIVIDUALS & FAMILIES**
 - Regardless their immigration status
 - Provided that Philoptochos policies and procedures are followed including submission of application and documentation requirements
 - Provided that services are delivered in the United States
 - Provided that Philoptochos payment can be made **DIRECTLY** to a vendor physically in the United States, e.g., landlord, mortgage holder, medical provider, utility company, funeral home, etc.
 - **NOTE:** Applicants **DO NOT** have to be a paid stewards of a parish **NOR** regular churchgoers. Persons from any Orthodox Christian jurisdiction are eligible to apply for / receive assistance.
- **WHY OUR SOCIAL SERVICES ASSISTANCE IS LIMITED TO ORTHODOX CHRISTIANS.**

We limit the population to whom we provide financial assistance because the sources of our funds are almost completely private – annual commitments from Philoptochos chapters, individual members, chapter fundraisers.

 - **Note: FINANCIAL HELP TO NON-ORTHODOX CHRISTIANS: We do not “just” turn people away.**
 - Refer person to a local organization – refer to our “*Guide to Finding Local Programs and Services*”
 - At your Chapter’s discretion, give non-Orthodox Christians a gift card for a limited amount.
- **PHILANTHROPIC DONATIONS TO OTHER ORGANIZATIONS:**
 - Many Chapters donate funds to local nonprofits, e.g., homeless shelters, domestic violence programs, food pantries, veterans’ programs, etc. that have been vetted and approved by the Chapter membership.

Evaluate whether to donate to another charity:

1. **CHARITY NAVIGATOR: <http://www.charitynavigator.org>**

Evaluates organization’s financial health, accountability, transparency; how efficiently a charity is using their support; sustainability of its programs and services over time, and level of commitment to good governance, best practices, and openness. Provides information about charities worldwide.
2. **GUIDESTAR/ FOUNDATION CENTER: <https://candid.org/> | www.guidestar.org**

In 2019 the Foundation Center & GuideStar joined forces to become Candid, a 501c3 nonprofit. Using financial information, IRS & 990 Forms, helps people make informed decisions about their donations and “connects people who want to change the world with the resources they need to do it.”

- **POLICIES FOR FINANCIAL ASSISTANCE:**
 - We pay bills **DIRECTLY** to the vendor who must be located within the US as documented by **INVOICE** (e.g., itemized invoice from funeral home) or **STATEMENT** (lease or mortgage statement, etc.)
 - **CLIENTS MUST VERIFY THEIR SITUATION:**
 - **Of medical condition** (if relevant): documentation of diagnosis, treatment plan, from medical provider on their letterhead; documentation of outstanding medical costs, including medical expenses, COBRA/insurance premium amounts, deductibles, copy of denials of coverage, etc.
 - *If the person is a Greek national, ask if they are covered by Greek insurance and try to obtain documentation about what, if anything, their insurance will cover.*
 - **Of housing costs:** copies of recent bills documenting rent or copy of current lease/mortgage statement / utility amounts verifying amounts, name, address, account number of vendors.
 - **If in arrears**, documentation of same via letter/notice from landlord/ mortgage holder, court-ordered eviction other legal document, utility shut-off notice, etc.
 - **Death/Final arrangements:** Itemized invoice from funeral home
 - **Household Income** – see section above, Application for Assistance
 - **Household Expenses** – see section above, Application for Assistance
 - **WHAT PHILOPTOCHOS CAN CONTRIBUTE TO:**
 - **UNCOVERED MEDICAL EXPENSES**
 - *Out-of-pocket medical costs, insurance premium, deductible/co-payment; COBRA premium, etc.*
 - **HOUSING COSTS:**
 - *Contribute to arrears of rent, mortgage, utilities, heating/ hot water costs, etc.*
 - *Depending on circumstances, we can temporarily house a homeless person in a hotel while they await placement in a shelter or other permanent housing, or, if (for example) there is a winter storm/ hurricane coming, and it would be dangerous for them to stay on the street.*

- **RELOCATION OF DOMESTIC VIOLENCE VICTIMS** to a safe environment
 - *Contribute to security deposit, 1st/last month's rent, moving costs, purchase of furniture, etc.*
 - **FUNERALS/BURIALS** to ensure indigent person receives proper Orthodox Christian burial.
 - **NOTE:** If there is a funeral home utilized by many parishioners, speak with the funeral director to discuss establishing "reasonable" rates for members of your community who have a fixed, low or moderate income.
 - *Make it clear to family members that Philoptochos cannot contribute towards excessive costs, such as a 'top of the line' casket.*
 - **TEMPORARY/STOP-GAP HELP**
 - While person awaits the start of public benefits
 - *Note: Be careful that your financial assistance is not counted as income that could disqualify or delay the person's ability to receive benefits. Consider a gift card instead.*
 - For those **INELIGIBLE** for public benefits (e.g., undocumented immigrant, etc.)
 - **Why We Do This:**
 - To give the person some breathing space and time to figure out their next steps, and to ensure the person knows God has not abandoned them.
 - *Sometimes, even if a case appears "hopeless", it may be appropriate to "do something".*
 - **GIFT CARDS** – Depending on circumstances, we can give the client gift cards to a supermarket, department store, gasoline station, other.
- **WHAT PHILOPTOCHOS DOES NOT PAY FOR:**
- We **DO NOT** give money to clients so they can pay bills themselves.
 - We **DO NOT** give cash directly to clients for any reason.
 - **Exception:** if person arrives for interview and it appears they have not had anything to eat, we can give them a small amount to get something to eat at a local coffee shop/ diner.
 - We **DO NOT** provide open-ended, unconditional help, or ongoing help such as a monthly stipend.
 - We **DO NOT** pay bills for services rendered in another country.
 - We **DO NOT** CONTRIBUTE TO OR PAY FOR CREMATIONS.
 - We **DO NOT** contribute to transporting remains of the deceased to another country, but we can help with preparation costs required by law or airline regulations (e.g., embalming, casket)
 - We **DO NOT** contribute to an account of any kind. This includes:
 - **NO** account established at a bank in the person's name either in the US or another country
 - **NO** personal account in the name of the client either in the US or another country
 - **NO** account established at a hospital or other institution in the person's name; however, we can and do contribute directly towards an actual bill for costs **incurred in the US.**
 - **NO online / CrowdFunding platform**, such as GoFundMe, youCaring, etc.
 - **REASON FOR PHILOPTOCHOS "NO PAYMENTS TO ACCOUNTS" POLICY:**
It is difficult and sometimes impossible to verify who is managing the account, or which bills will be paid, and, if the person passes away, how remaining funds will be disbursed, and by whom.
- **OTHER WAYS TO HELP**
- **NEGOTIATE A BILL**
 - Sometimes, simply by asking, a vendor (even a collection agency) will reduce/ discount a bill
 - If the person cannot do this themselves, ask permission to do so on their behalf.
 - **HOSPITAL "CHARITY CARE"**
Charity care is financial assistance/ relief programs offered by hospitals to patients to help reduce costs for patients by providing discounts or waiving some fees outright. Eligibility requirements vary.
 - Contact hospital billing department to ask about/help person start process for charity care.
 - Ask if the person may qualify for **Medicaid** (income-eligible benefit) now or in the future.
 - **EMERGENCY GRANTS:**
 - *Sometimes, it is necessary to give emergency funds without going through your regular financial decision-making process. At an executive board meeting, discuss / establish criteria for such grants, who can make such a decision (President? Treasurer? Other?), and the maximum amount they are authorized to award without prior approval. Consult with your Metropolis President for guidance.*
 - ***Since problems don't come to a halt in the summer*** or holidays, prepare a plan regarding how your Chapter will respond to social service needs during such times.

• **RECOMMENDED PROCEDURES FOR CHAPTER APPROVAL FOR SOCIAL SERVICES GRANTS**

Chapter audits: *Philoptochos policies require Chapters to have an audit conducted at the end of each administration of all the chapter's financial transactions – this includes Social Services grants.*

PRELIMINARY TASKS:

- **DEVELOP AN ANNUAL BUDGET** *that is reviewed and approved by your board and your membership, and that includes estimated income (stewardship, fundraisers, special appeals, etc.) in relation to estimated expenses (annual Metropolis and National commitments, operating costs, event costs, philanthropic contributions to local & broader nonprofit charities, etc.) For help developing your budget, contact your Metropolis President.*
- **In your chapter budget, include a line item for “Social Services Assistance to Individuals and Families”**
 - **Allocate an amount** for the total year that is based on your chapter's history of giving to individuals and families and considers size of your chapter.
 - **Maximum (cap) per grant:**
 - Decide your Chapter's maximum allowable amount per grant. At a board meeting, vote on the maximum amount your Chapter will award per case, regardless the reason, e.g., \$250 | \$500 | \$1,000 | other
 - **Regardless the cap, be prepared for extenuating circumstances, so decide the process by which you can exceed this cap if there is a compelling reason.**
- **FUNDRAISE:**
 - Past history will not always provide your chapter with all of the funds it may need going forward – think about how the pandemic impacted chapters' abilities to meet its basic necessities and special situations that arose. Be prepared and think about how your chapter will meet its budget goals?

OBTAINING CASE APPROVAL:

- **RECOMMEND GRANT TO EXECUTIVE BOARD:**
 - In consultation with the Chapter President, the chapter's "point person", based on her interview(s) with client and secondary sources and review of documentation submitted will present the case to the Executive Board recommending an amount to award.
 - **DO NOT** provide information that reveals identity of client. Suggested wording:
 - *Request is to contribute to the funeral of an elderly parishioner*
 - *Request is to prevent the eviction of a single parent and her (x) children*
 - *Request is to contribute to out-of-pocket medical costs of a cancer patient*
- **PUT THE REQUEST TO A VOTE**
 - **IF APPROVED,** provide the relevant documentation to the Chapter Treasurer to issue a check to the vendor. NOTE: **Two signatures** should be required on the check – President and Treasurer.
- **REPORT TO GENERAL MEMBERSHIP:** At your next full chapter meeting, provide an overview of social services activities and grants, again, without details that may identify clients helped.

STEP EIGHT: CASE-BY-CASE RECORD KEEPING

- **Maintain a “case record”** for each person who reaches out to you, including when they did so, their request, what you did, and that includes the person's application for assistance, consent form and all documentation submitted.
 - **Assign a “case number”** coordinated with the year the case first became known to you and that can be used to identify the case to your board and membership.
 - **Cross-reference** cases that carry over from one year to the next
 - **Track return askers** so you have a complete picture of help you and others have provided.
- **Safely secure the case records**
 - Locate a secure file cabinet, locked closet, or office at your church to place your files.
 - *It is not good practice to keep records at someone's home as confidentiality can be a problem. Files can be misplaced at home, thus making the transition from one administration to the next difficult and incomplete.*

STEP NINE: COLLABORATE WITH YOUR METROPOLIS / NATIONAL PHILOPTOCHOS

- When a client's financial need is greater than your Chapter's capabilities, obtain the person's permission to request supplemental help from your Metropolis Philoptochos and/or National Philoptochos.
 - **“Order of assistance”:** *Whenever possible, Philoptochos policies require financial assistance first be provided by the local chapter, then by the Metropolis Philoptochos and finally, by National Philoptochos.*

STEP TEN: COLLABORATE WITH YOUR PRIEST

- Parish priests are the “**Spiritual Advisors**” to Philoptochos Chapters who are an excellent resource to help you identify persons-in-need in your community. Please meet with your priest to clarify Philoptochos policies and procedures regarding social services assistance to Orthodox Christian individuals and families and to encourage him to refer cases to your chapter.
- No chapter should “hand over” its Philoptochos/ social services responsibilities for vetting cases and/or determining whether and how assistance will be provided to their priest.
 - *The priest should NOT be the primary or only way your Chapter helps individuals &/or families.*
 - No case should be awarded financial assistance solely because it was referred to you by the priest.
 - No chapter is required to provide the priest with information about who it assists, why or how.
- To ensure you respond per Philoptochos policies and procedures, cases referred by your priest should be thoroughly evaluated to ascertain and document its merits including completion of the application for assistance and consent form, interviewing primary and secondary sources and obtaining documentation to verify need.
- **DISCRETIONARY FUNDS TO PRIESTS**
Chapter do not have to provide a priest with discretionary funds.
 - **However**, if your Chapter wishes to do so, **put it to a vote of your board and general membership.**
 - Decide on the amount (e.g., \$250 - \$500) and whether to provide cash, gift cards or both.
 - To ensure **ACCOUNTABILITY and TRANSPARENCY** and in compliance with our audit policies, we recommend a “revolving” account that is refilled, upon receipt of an accounting by the priest regarding how he distributed such funds, including who (not by name, but e.g., single parent, homeless adult, etc.) date and amount given and purpose.
 - Obtain this accounting **BEFORE** you replenish this fund.

OTHER:

USE OF CHAPTER FUNDS FOR NON-CHARITABLE OR NON-PHILANTHROPIC PURPOSES

From time to time, Churches ask their Philoptochos Chapters to pay for or contribute to “bricks and mortar” needs such as repairing the roof, paving the driveway, purchasing furnishings or equipment, etc.

- *Please note that you **CANNOT pay for “bricks and mortar” expenditures from funds raised and designated for social services, charitable or other philanthropic purposes.***
- *If your Chapter is asked or wishes to contribute to non-charitable or non-philanthropic needs,*
 - *First, discuss the pro’s and con’s of doing so with your board and put it to a vote of your board AND general membership.*
 - **IF YOU DECIDE TO DO SO, SPONSOR A SEPARATE AND SPECIFIC EVENT/APPEAL/FUNDRAISER THAT CLEARLY PUBLICIZES HOW FUNDS RAISED THROUGH THIS EFFORT WILL BE USED.**
 - *e.g., “Proceeds from this (type of event) will help the Church to (e.g.,) re-pave the driveway.”*

WHEN SPONSORING ACTIVITIES SUCH AS A “TRICKY TRAY”, 50/50 RAFFLE, SILENT AUCTION, OTHER GAMES OF CHANCE, etc.:

- **Because many jurisdictions regulate “legalized games of chance”** and indeed some deem them illegal, contact your local government to find out whether you can hold such an event, and if yes, what you must do to comply with laws and regulations.
- **If the event serves / sells alcoholic beverages**, a separate alcohol license may be needed.
- **KNOW THE RULES:** For more information about requirements, licenses, permits, “donor” contributions (e.g., winning bid on an auction item) go to the website of the National Council on Nonprofits:
 - <https://www.councilofnonprofits.org/tools-resources/games-of-chance-raffles-and-charity-auctions>
 - *the website provides a link to each State Association of Nonprofits.*
 - Or contact the **National Council on Nonprofits** at:
1001 “G” Street NW, Suite 700 East | Washington, DC. 20001 | 202.962.0322

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*If you have any questions, please contact the
National Philoptochos Department of Social Services at socialwork@philoptochos.org or 212.977.7782
Thank you for all you do.*

06.2022