

# Philoptochos



## Helping People

# A Two-Part Social Services Training Webinar for Local Chapters and Metropolis Boards

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*A presentation of the Greek Orthodox Ladies Philoptochos of the Greek Orthodox Archdiocese of America*  
126 East 37<sup>th</sup> Street • New York, NY 10016  
Main #: 212.977.7770 • Confidential Social Work #: 212.977.7782 • [www.Philoptochos.org](http://www.Philoptochos.org)  
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# ***PART ONE: April 22, 2016***

**Social Services Training Webinar  
for Local Chapters and Metropolis Boards**



**PHILOPTOCHOS PROVIDES SOCIAL SERVICE ASSISTANCE TO  
ORTHODOX CHRISTIANS IN NEED WHO ARE IN THE UNITED STATES,  
REGARDLESS OF THEIR IMMIGRATION STATUS.**

**TRAINING GOALS:**

- **To inform you about the social problems that members of our community face**
- **To discuss ways to help people acquire, to the greatest extent possible, the skills and tools they need to manage on their own in the future.**
- **To ensure that the social services provided by Philoptochos Chapters and Metropolis Boards are consistent, compassionate, accountable and transparent.**
- **To support your local social services efforts to make your local social services work a little easier.**




# **CONFIDENTIALITY**

*The bedrock of social services*

- **Most of those who seek our help never thought they would have ask anyone for help, let alone us.**
- **Please respect their privacy.**



# OUTREACH

- ▶ **Informing your church community, local public, private and nonprofit organizations who you are and how you can help.**
- 



## SAMPLE FLYER

- ▶ **Has a loss of employment put you behind with your rent or mortgage?**
- ▶ **Are you overwhelmed with out-of-pocket medical or prescription costs?**
- ▶ **Do you need help finding a local food pantry or soup kitchen?**

*If you or someone you know is struggling,*  
**CONFIDENTIAL HELP IS AVAILABLE THROUGH**  
*[Name and contact information for your chapter]*



**WHO IN YOUR CHAPTER WILL  
REACH OUT TO THE PERSON  
WHO ASKS FOR YOUR HELP?**

**SELECTING YOUR CHAPTER'S  
SOCIAL SERVICES  
“POINT PERSON”**



## *Your 'point person' should be able to:*

- **Maintain confidentiality**
- **Understand the stress the person seeking help is facing**
- **Be non-judgmental, kind and patient**
- **Show compassion with empathy, not pity**
- **Listen to what the person is saying**
- **Respond directly to their concerns**
- **Offer clear information about what your chapter can & cannot do**
- **Explain your chapter will do its best to help, but there are procedures that must be followed**
- **Discreetly and respectfully ask for required documentation**
- **Keep her own values in check**
- **Try to help the person gain some control over their situation** (*"Which bills are most important for us to consider first?"*)
- **Know how to say, "I don't know but I'll try to find out"**
- **Recognize the effect of listening to other people's problems is negatively impacting her life**
- **Know when she's over her head and needs to ask for help from others.**



- 
- **APPLICATION FOR ASSISTANCE**
  - **CONSENT FOR RELEASE OF INFORMATION**

***USE THE APPLICATION AS A GUIDE  
TO FIND OUT WHAT THE PERSON NEEDS  
AND TO DECIDE THE BEST WAY TO HELP***

***LEAVE A SUPPLY IN YOUR CHURCH OFFICE TO BE  
GIVEN TO 'WALK-INS' TO COMPLETE AND SIGN***

## APPLICATION FOR ASSISTANCE TELLS YOU:

- HOW THEY HEARD ABOUT YOU
- IDENTITY / ASKS FOR RECENT PHOTO / CONTACT INFORMATION
- IMMIGRATION STATUS
  - *(this is asked because eligibility for many benefits is based on citizenship or permanent residency)*
- OTHERS IN THE SAME HOUSEHOLD
- TYPE OF HOUSING THEY LIVE IN & MONTHLY COST
- HELP FROM OTHER SOURCES
- OTHER INFORMATION – *If there is any history of substance abuse or mental illness. Whether there are firearms in household and how they are secured (especially critical if there is a history of mental illness and there are children in the household).*
- HOUSEHOLD INCOME AND EXPENSES
- THEIR SPECIFIC “ASK”
- PAST & PRESENT HISTORY; IF THEY HAVE A PLAN TO MANAGE ON THEIR OWN IN THE FUTURE

### **IF THE PERSON IS FROM OUTSIDE YOUR COMMUNITY:**

*Contact your Metropolis Philoptochos or National Philoptochos to learn if they are known elsewhere*

### **IF THE PERSON IS A HABITUAL ‘ASKER’:**

*Contact your Metropolis Philoptochos or National Philoptochos to find out if they go from ‘church to church’, ‘chapter to chapter’, asking over and over again for someone to ‘rescue them’ and/or pay the same or similar bills.*

# RECORD KEEPING

1. Create a 'case record' for each person who seeks your help
2. Include in it the signed application and consent forms, client photo and copies of all documentation submitted.
3. Include a written summary of all contacts with the person – by date – and indicate the help that was provided and by whom (e.g. chapter, Metropolis, National, other public, private or non-profit organization etc.)
4. Include copies of bills and checks that were generated on the person's behalf
5. Keep the case record in a secure location in a locked file cabinet in your church.
6. Do not put the person's name on the outside of the folder: assign each case a number reflecting the year the person sought your help, followed by an "I.D." number
7. Only the Chapter President, Treasurer and Social Services Point Person should have access to these files.

# THE INTERVIEW

*Lets the person tell you their 'story'  
in their own words*

## PROTECT YOURSELF & YOUR OWN PRIVACY

- *Best to do a face-to-face interview in a quiet location in your church*
- *Do not interview the person in your own home*
- *Do not go to the person's home by yourself*
- *When using your own telephone, first dial \*67 so that your number does not come up on the person's Caller ID*

# SAMPLE OPEN-ENDED INTERVIEW QUESTIONS

## Open with:

*“I don’t mean to be intrusive, but for us to find out the best way to help you, I would appreciate if you would answer the following questions.*

*Please know that everything you tell me will remain confidential and will only be shared with others with your permission.”*

**While all of our suggested questions are important, the two that can be most helpful to you are:**

- **How have you managed until now**
  - **How do you plan to manage in the future**



# **WHY PEOPLE ASK FOR OUR HELP**

- **POVERTY OR INCOME INADEQUACY**
  - Loss of employment / underemployment
  - Paying rent / mortgage or utility bills, buying food through credit cards
- **PUBLIC BENEFITS CUT OR REDUCED**
- **DISASTER**
  - Natural disaster or other, e.g. fire, flood
- **FAMILY SITUATION**
  - Divorce/ abandoned, death of breadwinner,
- **HEALTH CONDITION**
  - theirs or other family member



# WHY PEOPLE ASK FOR OUR HELP

- **MENTAL ILLNESS**
  - Theirs or other family member
- **SUBSTANCE ABUSE**
  - Codependency
- **JUDGMENT / LIFESTYLE**
- **HABITUAL ASKER**
- **SENSE OF ENTITLEMENT**
  - They think that Philoptochos **MUST** help them

***DOES YOUR RESPONSE TO THE PERSON DIFFER  
DEPENDING ON WHY THEY ARE ASKING FOR HELP?***



**Philoptochos**



**Helping People**

**PART TWO: May 13, 2016**  
**Social Services Training Webinar**  
**for Local Chapters and Metropolis Boards**

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## **QUICK REVIEW OF SESSION #1:**

- **Importance of confidentiality**
- **Selecting your chapter's social services 'point person'**
- **Application for Assistance / Consent for Release of Information**
- **Interviewing those who seek your help in a respectful and sensitive manner so you can obtain the information and documentation you need to make an informed decision about how to help effectively**
- **Identifying underlying issues for their needing help as frequently, these underlying reasons have to be dealt with before you can move forward.**

# HOW WE HELP

Because Philoptochos does not have the resources to be the answer to all problems, nor can we provide ongoing or unlimited help, we can assist people to find AND ACCEPT help from other sources, e.g. other nonprofits, government agencies, public benefits.

So that such referrals don't come as a surprise later on in your contacts with the person, let him / her know during your first interview that you may refer them to other services to ensure they get the all help they need and are entitled to.

## ► IF THE PERSON REFUSES, FIND OUT WHY . . .

- Is it because they are embarrassed to apply for “welfare”?
  - *Let them know they can terminate their social services case once they are back on their feet.*
- Is it because their command of the English language isn't good enough for them to apply on their own?
  - *Offer to go with them to negotiate the system, help them fill out forms, wait with them, and possibly act as their interpreter (ask the government / benefits office to provide an interpreter).*
- Is it because they are a single parent and cannot spend all day at a government office because they must be able to pick up their child(ren) from school?
  - *Offer to arrange to have someone she knows or someone from your chapter to pick up their child from school. Or, offer to pay for that day's after school activity*

On our website:  
**GUIDE TO FINDING LOCAL RESOURCES, PROGRAMS AND SERVICES  
TO HELP THE INDIVIDUAL AND / OR THEIR FAMILY**

- **ALCOHOL AND SUBSTANCE ABUSE** Programs and 12-Step Groups for adolescents and adults
- **MENTAL HEALTH SERVICES** including the Suicide Prevention Lifeline
- **OLDER ADULT SERVICES & PROGRAMS** – including an online confidential benefit eligibility screening tool for persons 55 and over; Administration on Aging long-term care Ombuds program
- **DOMESTIC VIOLENCE / INTIMATE PARTNER ABUSE RESOURCES** and services, including Teen and College Dating Violence, elder and child abuse. Includes *Philoptochos Fact Sheets* and literature developed by the National Philoptochos Social Services Department to help you help the victim
- **HOMELESSNESS & FOOD INSECURITY**, including an interactive state-by-state map of food pantries.
- **RESOURCES FOR CANCER PATIENTS**, including temporary housing for cancer patients throughout the USA; financial assistance, support, counseling from other organizations
- **AUTISM SPECTRUM DISORDERS**, including the 'new' definition, health insurance reform laws, effects of autism on the disabled child's siblings
- **BURIAL BENEFITS FOR VETERANS** of the American armed forces
- **PERSONAL FINANCIAL MANAGEMENT** including helping a client develop a family budget

# WHEN THE NEED IS FINANCIAL ASSISTANCE

## ➤ WHO WE HELP:

- Orthodox Christian individuals and families regardless of their immigration status as long as the services are provided in the United States and payment can be made directly to the vendor – landlord, mortgage holder, utility company, medical provider.
- **The person DOES NOT have to be a 'paid' member of the Church**
- At their discretion, Chapters can provide supermarket or store gift cards to non-Orthodox Christians who are walk-ins or come to your church

## ➤ WHY WE LIMIT MOST OF OUR HELP TO ORTHODOX CHRISTIANS:

- The main source of our funds come from Philoptochos chapters and fundraisers held by our chapters for charitable and philanthropic purposes



# WHAT PHILOPTOCHOS GRANTS CAN CONTRIBUTE TO . . .

- **UNCOVERED MEDICAL EXPENSES** (*copayments, deductibles, premiums, denied costs, etc.*)
- **HOUSING COSTS** *including utility bills and other daily living expenses*
- **RELOCATE VICTIMS OF DOMESTIC VIOLENCE TO A SAFE ENVIRONMENT**
- **FUNERALS / BURIAL ARRANGEMENTS**
  - **NOTE:**
    - WE DO NOT CONTRIBUTE TO THE TRANSPORTATION COSTS OF SHIPPING A PERSON'S REMAINS TO ANOTHER COUNTRY, BUT WE CAN HELP PAY FOR PREPARING THE BODY FOR SUCH A TRANSPORT (e.g. embalming cost, casket, etc.)
    - WE DO NOT CONTRIBUTE TO OR PAY FOR A CREMATION
- **TEMPORARY / STOP-GAP HELP TO GIVE PEOPLE BREATHING SPACE & HOPE**
  - **HELP WHILE THE PERSON WAITS FOR PUBLIC BENEFITS TO BEGIN**
    - **NOTE:** Be careful that your help is not counted as "income" that could disqualify or delay the person's ability to receive government benefits. You can consider giving gift cards instead, or paying a bill directly
  - **FOR PERSONS NOT ELIGIBLE FOR PUBLIC BENEFITS (e.g. non-citizen, over income, doesn't meet other eligibility requirements) TEMPORARY HELP FOR A LIMITED AMOUNT OF TIME**
    - **NOTE:** IF THE PERSON MAY BE OVER INCOME - Do not make the determination yourselves as some programs allow over-income eligibility due to extenuating circumstances, such as the Medicaid "Spend-Down" Program
  - **TO ENSURE THEY KNOW THAT GOD HAS NOT ABANDONED THEM** – Sometimes, even if it looks like a 'hopeless' case, it is appropriate to 'do something' because we are representatives of the Church
- **AWARDING OF GIFT CARDS** – supermarket, department store, gas, etc.

## DOCUMENTATION REQUIREMENTS FOR FINANCIAL ASSISTANCE REQUESTS

### WHAT THE CLIENT NEEDS TO DO:

*NOTE: Financial needs of and documentation submitted by clients must be kept confidential*

#### ➤ **CLIENT MUST SUBMIT VERIFICATION OF THE SITUATION / CONDITION:**

- Of medical condition from medical provider on his/her letterhead
- Official documents confirming accrued rent / mortgage / utility arrears (e.g. from landlord, mortgage holder, court ordered eviction, utility shut-off / service discontinuation notice, etc.)
- Death certificate
- Other verification depending on the client's situation

#### ➤ **PHILOPTOCHOS POLICIES:**

- Philoptochos pays bills directly to the vendor
- Philoptochos does not provide open-ended or unconditional help.
- Philoptochos does not “give money” to the client so that the person can pay the bill him/herself.
- Philoptochos does not pay bills for services rendered in another country, either directly or indirectly



**CONTINUED:**

## **DOCUMENTATION REQUIREMENTS FOR FINANCIAL ASSISTANCE REQUESTS**

*NOTE: Financial needs of and documentation submitted by clients must be kept confidential*

### **➤ HOUSEHOLD INCOME – of everyone in the household**

- *recent pay stubs*
- *tax return*
- *public benefit award or denial letters*
- *bank statement showing direct deposits*
- *income from any other sources, e.g. child support or alimony, family, friends, etc.*
- *insurance settlements*
- *other*

### **➤ HOUSEHOLD EXPENSES**

- *current lease or rent receipts*
- *mortgage bill*
- *utility bills*
- *arrears notices*
- *medical / hospital bills*
- *funeral home invoice, etc.*
- *credit card bills*
- *Insurance premiums*
- *When possible, food and transportation expenses*
- *Other unpaid bills*

**IF YOU HAVE ANY QUESTIONS OR DOUBTS ABOUT WHAT TO ASK FOR OR HOW TO ASK RESPECTFULLY,  
CONSULT YOUR METROPOLIS SOCIAL SERVICES CHAIR OR THE NATIONAL PHILOPTOCHOS SOCIAL  
SERVICES DEPARTMENT.**

CONTINUED:  
**OTHER WAYS TO HELP . . .**

➤ **DIRECT CASH ASSISTANCE**

- Sometimes, giving a person cash is the best of only way to help and if you can't arrange for an immediate direct payment.
- IN ADVANCE OF NEEDING TO DO SO, ESTABLISH THE CRITERIA WITH YOUR BOARD AND CHAPTER TO CLARIFY WHEN YOU CAN AND CANNOT GIVE CASH TO AN INDIVIDUAL
  - Examples:
    - A prescription must be filled immediately, and the pharmacy won't accept your chapter's check
    - The person hasn't eaten anything - you give them cash to go to a local diner or restaurant
- Keep in mind that direct cash assistance may disqualify or delay the person's application for public benefits. In such cases, give a gift card instead.

➤ **HELP TO NEGOTIATE A BILL**

- Many bills can be reduced, discounted or completely eliminated just by asking the provider. For clients who cannot do this themselves, do so on their behalf.

## OTHER CONSIDERATIONS . . .

### ➤ **IF THE PERSON SEEKING YOUR HELP IS NOT FROM YOUR COMMUNITY . . .**

- Contact your Metropolis Philoptochos President and/or your Metropolis Philoptochos' social services chair to ask if the person is known and has been helped elsewhere, when and how. (Sometimes, people go from church to church asking for the same bills to be paid).

### ➤ **IF THE PERSON SEEKING YOUR HELP RESIDES OUTSIDE YOUR METROPOLIS . . .**

- Contact your own Metropolis Philoptochos President and/or your Metropolis Philoptochos' social services chair, OR contact the Metropolis in which the person resides, OR contact National Philoptochos social services to ask if the person is known and has been helped elsewhere, when and how.

### ➤ **IF THE PERSON SEEKING YOUR HELP IS FROM ANY LOCATION OUTSIDE THE UNITED STATES . . .**

- Because it is very difficult and frequently impossible to verify the legitimacy of such requests, Philoptochos policies prohibit us from sending funds to individuals in other countries, or to pay bills generated in other countries.
- *Philoptochos and the Archdiocese have developed a "form letter" that respectfully declines the individual's request for money.*
  - *To obtain a copy, please contact Paulette Geanacopoulos at 212.977.7782 or by email at [PauletteG@Philoptochos.org](mailto:PauletteG@Philoptochos.org)*

# ENSURING ACCOUNTABILITY & TRANSPARENCY FOR YOUR SOCIAL SERVICES GRANTS: WHAT YOUR CHAPTER NEEDS TO DO:

## YOUR CHAPTER'S BUDGET:

- ▶ **INCLUDE A LINE-ITEM IN YOUR CHAPTER'S ANNUAL OR BI-ANNUAL BUDGET FOR "SOCIAL SERVICES ASSISTANCE TO INDIVIDUALS AND FAMILIES".**
- ▶ **STAY WITHIN THIS BUDGET LINE:**
  - ▶ Total financial grants awarded during that period should stay within that amount
  - ▶ *In extenuating circumstances, you can exceed that amount – but establish the criteria for when, why and how you will do this.*
- ▶ **MAXIMUM AMOUNT OF GRANT PER CLIENT / PER REQUEST:**
  - ▶ Discuss, decide and vote on the maximum amount that your chapter agrees to award to any one client for any reason. This amount should be based on the priorities and financial capabilities of your chapter, (e.g. \$250 / \$500 / \$750 / \$1,000 / \$1,500, etc.)
- ▶ **CHECKLIST BEFORE A GRANT IS AWARDED:**
  - ▶ You have obtained the completed and signed *Application for Assistance and Consent for Release of Information* from the person seeking help.
  - ▶ The social services point person has interviewed the client
  - ▶ You have requested and obtained the necessary documentation from the person
  - ▶ You have verified information with secondary sources – if needed
  - ▶ If more than one bill has been submitted, you have asked the person which ones are their priority,
  - ▶ The social services person has discussed the merits of the 'ask' with the president and treasurer and makes a recommendation to give a grant, and/or request more information, and/or refer elsewhere, etc.
    - ▶ If a request is denied, be prepared to explain to the person and/or other relevant parties why and how you made this decision.



CONTINUED:

## ENSURING ACCOUNTABILITY & TRANSPARENCY FOR YOUR CHAPTER'S SOCIAL SERVICES GRANTS:

- ▶ **ONCE THE CHECKLIST HAS BEEN FOLLOWED**
  - ▶ Present the case to your EXECUTIVE COMMITTEE (NOT your entire board, nor your membership)
  - ▶ DO NOT PROVIDE THE NAME OF THE CLIENT, NOR ANY INFORMATION THAT WILL IDENTIFY WHO THE PERSON / FAMILY IS.
  - ▶ Be prepared to answer questions about the recommendation(s) being made
    - ▶ Are any of the questions raised in opposition to the recommendation based on someone's own personal values rather than the merits of the case?
      - ▶ e.g. Person should have planned better; why didn't the person budget; what did they think was going to happen?; why don't they move in with their family?; why should we throw good money after bad?; she should have left her abusive partner a long time ago and saved some money in preparation, etc.
  - ▶ PUT THE RECOMMENDATION TO A VOTE
  - ▶ WHEN APPROVED, PAY THE BILLS –
    - ▶ Two signatures should be required on each check – (President and Treasurer)
- ▶ **AT YOUR NEXT BOARD AND GENERAL MEMBERSHIP MEETING, GIVE A SOCIAL SERVICES REPORT OF ACTIVITIES AND GRANTS AWARDED.**
  - ▶ DO NOT PROVIDE INFORMATION OR DETAILS THAT IN ANY WAY WILL IDENTIFY WHO THE PERSON IS.
    - ▶ *Sample report:*
      - ▶ *two grants were awarded this month as follows “(x) # of months’ rent to prevent the eviction of a single parent and her three school-age children” or, “payment of ‘y’ amount directly to the hospital (clinic / doctor) as our contribution towards uncovered medical bills of an 8 year old cancer patient”.*

**CONTINUED:**  
**ENSURING ACCOUNTABILITY & TRANSPARENCY FOR YOUR  
CHAPTER'S SOCIAL SERVICES GRANTS:**

- **EMERGENCY GRANTS:** From time to time, it may be necessary to award an emergency grant.
  - In preparation,
    - **ESTABLISH THE CRITERIA** for giving an emergency grant –
      - Under what circumstances?
      - Who can make such decisions (*generally the president and treasurer*)?
      - What is the maximum amount the president and treasurer are authorized to award on their own without executive committee approval?

**SINCE PROBLEMS DON'T COME TO A HALT IN THE SUMMER  
NEITHER SHOULD YOUR CHAPTER'S SOCIAL SERVICES EFFORTS**

- **WHEN YOUR CHAPTER'S OFFICERS AND/OR SOCIAL SERVICES CHAIR ARE ON VACATION:**
  - Members of our community need help year-round, so establish a plan to determine who and how your chapter will respond to social service needs during vacation times.
  - Ask your Metropolis Philoptochos President and/ or Social Services Chair to help you come up with a 'plan' to be able to meet needs year-round.

## REQUESTS THAT WE CANNOT PAY:

- **REQUESTS FROM PEOPLE IN GREECE OR OTHER COUNTRIES:**
  - PHILOPTOCHOS POLICIES PROHIBIT US FROM SENDING MONEY TO ANYONE OUTSIDE OF THE UNITED STATES, OR PAYING A BILL FOR A SERVICE PROVIDED OUTSIDE THE UNITED STATES.
- **WE DO NOT CONTRIBUTE TO TRANSPORTATION COSTS TO BRING SOMEONE TO THE U.S.A.**
- **WE DO NOT CONTRIBUTE TO THE COSTS OF SHIPPING A PERSON'S REMAINS TO GREECE OR TO ANOTHER COUNTRY** (BUT WE CAN CONTRIBUTE TO PREPARATION COSTS e.g. embalming, casket, etc.)
- **WE CANNOT CONTRIBUTE TOWARDS THE COST OF CREMATING SOMEONE.**
- **WE DO NOT CONTRIBUTE TO ANY KIND OF AN ACCOUNT**
  - Whether one established at a bank, or a personal account in the name of a client or a special account established at a hospital or other institution in the name of the client, or to any online / internet crowdfunding platform that allows people to raise money through sites such as GoFundMe, youCaring, etc.
    - **REASON:** It is difficult to find out who is managing the account e.g. who decides what will be paid and when, or, if the person passes away, we do not know how funds will be disbursed, by whom and how.
- **WE DO NOT PAY TUITION COSTS OR OFFER SCHOLARSHIPS**
  - **Exceptions:** National Philoptochos provides scholarship funds to Holy Cross Seminary – the President determines the recipients. Some chapters contribute to college / vocational school costs of students from St. Basil's Academy who are graduating high school and will attend college in the fall – the funds are provided directly to the college/vocational school .





## ***COLLABORATE WITH YOUR METROPOLIS AND/OR NATIONAL PHILOPTOCHOS***

- **When the “ask” and “need” is greater than your chapter’s ability:**
  - **OBTAIN THE PERSON’S PERMISSION**  
to request supplemental help
    - **FIRST** from your Metropolis Philoptochos
    - **THEN** from National Philoptochos.

# YOUR PARISH PRIEST AND SOCIAL SERVICES ASSISTANCE

- ▶ **Your parish priest is your chapter's SPIRITUAL ADVISOR.**
  - ▶ While all chapters work closely with their priest, they do not need to inform him nor obtain his approval to provide help to any individual or family
- ▶ That said, your parish priest can be an excellent resource to help you identify persons-in-need in your community. He also can help you in the interview process – some clients prefer revealing their situation to a priest rather than to a Philoptochos representative
- ▶ **KEEP IN MIND, REGARDLESS WHO REFERS A CASE TO YOU, YOU SHOULD FOLLOW YOUR ESTABLISHED PROCEDURES AND EVALUATE EVERY CASE BASED ON ITS MERITS.**

## DISCRETIONARY FUNDS TO PRIESTS

- **If your priest asks your Philoptochos chapter for money to distribute through his own 'benevolence fund.'**
  - No chapter is required to do so, but if you are asked or if you wish to do so, put it to a vote of your board and membership.
    - It is best to give your priest gift cards rather than cash that he can distribute to those in need.
    - Decide on the amount (e.g. \$250)
    - Decide if it will be a 'revolving account' replenished when the funds are drawn down.
  - Because we must maintain transparency and be accountable to our and your donors for Philoptochos funds utilized, ask the priest to give you a report, e.g. "X" gift card to . . .
    - Obtain the report before you replenish the fund

## CONTRIBUTING TO NON-CHARITABLE OR NON-PHILANTHROPIC PURPOSES

- ▶ *Whether asked to do so by the Parish Council, your priest, or whether it is something your chapter wishes to do – e.g. repair the roof, repave the driveway, purchase tables, chairs, other equipment, etc.:*
  - ▶ **YOU CANNOT PAY FOR OR CONTRIBUTE TO SUCH EXPENDITURES FROM MONIES RAISED AND DESIGNATED FOR SOCIAL SERVICES, CHARITABLE OR OTHER PHILANTHROPIC PURPOSES.**
- ▶ **THAT SAID, YOU MAY CONTRIBUTE TO “BRICKS AND MORTAR” NEEDS OF YOUR CHURCH BY:**
  - ▶ **PUTTING IT TO A VOTE OF YOUR CHAPTER**
  - ▶ **SPONSORING A SEPARATE FUNDRAISER THAT CLEARLY PUBLICIZES AND INFORMS DONORS HOW FUNDS FROM THAT EVENT / APPEAL WILL BE USED.**



## **REFER TO:**

**“RECOMMENDED STEP-BY-STEP PROCEDURES FOR PHILOPTOCHOS METROPOLIS & LOCAL CHAPTERS WHEN PROVIDING SOCIAL SERVICES ASSISTANCE TO INDIVIDUALS & FAMILIES”**

**FOUND ON THE PHILOPTOCHOS WEBSITE AT:**

**<http://www.philoptochos.org/socialservices/proceduresforchapmet>**

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- **To submit questions after the webinar has ended, please email [PauletteG@Philoptochos.org](mailto:PauletteG@Philoptochos.org) or [Eleni.Constantinides@gmail.com](mailto:Eleni.Constantinides@gmail.com)**
- **To view a video of these webinars, please go to [www.Philoptochos.org](http://www.Philoptochos.org)**

**Thank you.**