



WAKE FOREST UNIVERSITY

Chaplain's Emergency Fund (CEF) Guiding Principles

Functional Area: Office of the Chaplain	Date Issued: 05/02/2018
Applies To: All Faculty, Staff, Students, and Contract Workers	Page(s): 5
Policy Reference(s): N/A	Governance Body: CEF Advisory Committee

1. **Responsible Person**

The University Chaplain is responsible for maintenance of the *Guiding Principles*, and for responding to questions posed regarding the principles.

2. **Purpose/Rationale**

The purpose of the Chaplain's Emergency Fund is to provide limited financial assistance to eligible Wake Forest University faculty, staff, students, and contract workers in times of disaster or personal emergencies or hardships.

3. **Eligibility**

- Eligibility is limited to active faculty, staff, student, or contract worker.
- Participants must demonstrate a temporary financial hardship because of an emergency situation. A *temporary* financial hardship is one caused by a defined time-limited, specific event such as fire, family crisis, natural disaster (flood, tornado, etc.), serious extended illness or injury, disability, or death in immediate family. "*Temporary*" means that you were able to manage your finances before but are now several hundred dollars in debt and, with these funds, could regain your financial stability within a couple of months. Individuals with long-term financial problems that do not meet the temporary hardship requirement will be referred to the Employee Assistance Program (EAP). The

Office of the Chaplain may work with off campus partners to identify additional resources.

- All current Wake Forest University employees who have completed a minimum of 90 days of service may apply and will be eligible if there are sufficient funds available.
- Immediate family for the purpose of the fund will be defined as legal spouse, domestic partner, or legally dependent child (minor or full-time student up to 23 years old).
- Only essential expenses will be considered for payment. These include, but are not limited to utilities, rent, mortgage, food, transportation to work, school supplies, uninsured medical expenses, uninsured losses for damage to an individual's primary residence caused by fire, crime, flood or other disaster, etc. Non-essential bills such as cell phones, cable TV, gifts for others, charge accounts, bills associated with unexpected divorce or abandonment, taxes, child support, legal/attorney's fees, fines or any assessment by a court of law or government entity, elective surgery, etc. will NOT be considered for payment. Exceptions may be made at the discretion of the Chaplain's Emergency Fund Advisory Council. Payment will be made directly to the vendor, unless it is impossible to do so.

4. Limits

- No more than \$500 may be awarded to a faculty, staff, students, or contract worker during any 12 month period unless otherwise determined by the Chaplain's Emergency Fund Advisory Committee.
- No more than one application per employee per crisis can be accepted.
- Only one application per household can be accepted. Household is defined as all individuals residing at an address, whether related or not, who draw their physical support from a common financial pool, or who present themselves as a family.
- Faculty, staff, students, or contract workers who receive assistance from the fund may not be eligible for additional assistance within 12 months, unless requested by a majority of the committee.
- An incomplete application expires six weeks after the date of its submittal if not completed as requested and/or required documents are not submitted. After six weeks the applicant must resubmit a complete application for funding
- Given the limited amount of funds, all requests cannot be approved even though there may be a clear need for assistance. This fund may be insufficient in the case of widespread disasters, community crises, or war/terrorism.

5. **Procedure** – *Requester must complete an application for emergency funding and be approved before the funds can be distributed.*

- Application for emergency funding may be accessed via:
 - The Office of the Chaplain office (Reynolda Hall, Suite 8D); Monday through Friday 8:30AM-4:00PM.
 - The Office of the Chaplain website – www.chaplain.wfu.edu
 - Email by sending a request to beckmapp@wfu.edu.
- An application will be considered complete when the following parameters are met:
 - All requested contact information completed.
 - Description of the nature of the situation, severity and anticipated duration documented.
 - Purpose of request (i.e., specific expense to be paid).
 - Verifications and documentation is included (NOTE: without proper and legitimate documentation, the request will be considered incomplete and invalid.)
 - If approved, checks will be made payable directly to the creditor so invoices to be paid must be included with the documentation.
 - Requests for food cash cards are limited unless otherwise determined by the Chaplain’s Emergency Fund Advisory Committee.
 - Authorization will be required for the applicant to release information to others regarding the basis of the request.
 - The amount of a single request may not exceed \$500.00 unless otherwise determined by the Chaplain’s Emergency Fund Advisory Committee.
- Each application must be accompanied by supporting documentation that demonstrates how the hardship has affected the applicant’s household finances. Recommended documentation includes the expenses of the applicant, the income available to the applicant, and evidence of insurance. Examples of documents are provided below:
 - Certification of medical condition
 - Death certificate
 - Obituary
 - Medical bills
 - Insurance claims
 - Expense receipts
 - Police reports
 - Foreclosure or eviction notice
 - Severance package or separation notice

6. Procedural Review

- The completed application and supporting documentation must be submitted by mail, email beckmapp@wfu.edu, via interoffice mail to: Office of the Chaplain, or hand-delivered to: Reynolda Hall, Suite 8D.
- The Office of the Chaplain will verify the contact information and the minimum 90 days of satisfactory service with a WFU Human Resources representative. The HR office does not approve/deny requests.
- Once verified, the application will be routed to the Office of the Chaplain Office Manager for review by the Advisory Committee. The requester's contact information will be kept confidential throughout the Chaplain's Emergency Fund review process.
- The Chaplain's Emergency Fund Advisory Committee shall be comprised of the Office Manager, University Chaplain and three non-managerial Office of the Chaplain employees, representing a broad spectrum of persons.
 - Participation on the Chaplain's Emergency Fund Advisory Committee is voluntary and members may elect to remove themselves from the committee at any time.
 - Any member of the Committee who has a conflict of interest due to family, personal or business associations shall refrain from discussing or voting on such matters.
 - All financial assistance will be distributed in compliance with Wake Forest University's Non-Discrimination Statement.
 - The Chaplain's Emergency Fund Advisory Committee will meet or confer with each other as needed to determine if an application is approved or denied based on an objective determination of the financial need or distress. The Committee may be asked to review a submitted application and recommend policy changes. Compliance with IRS guidelines will be determined by Wake Forest University Financial Services through cooperation with independent auditors.
- Once an application is approved by the Chaplain's Emergency Fund Advisory Committee, the Committee notifies the Office of the Chaplain Office Manager for the processing of payment.
- The Chaplain's Emergency Fund Advisory Committee will respond to each request on a case by case basis and reserves the right to make adjustments as needed to meet the needs of the individual.
- The Office of the Chaplain will arrange for payment of the grant directly through paying an invoice on the faculty, staff, student, or contract worker's behalf or paying the grant directly to the faculty, staff, student, or contract worker.

7. Notification of Decision

Faculty, staff, students, or contract workers will be notified of decision by e-mail or phone within ten days after the Chaplain's Emergency Fund Advisory Committee members receive the faculty, staff, students, or contract worker's completed application and documents.

8. All decisions made by the Chaplain's Emergency Fund Advisory Committee are final.

9. Faculty, staff, students, or contract worker's emergency fund grants will be documented in the Office of the Chaplain's records, but will not be included as any part of the faculty, staff, students, or contract worker's personnel or academic files.

10. Donating to the Fund

- Any person or entity is eligible to donate to the Fund.
- The fund will be administered by the Office of the Chaplain.
- Faculty, staff, students, and contract workers may donate to the Fund by cash, check, online donation, or via payroll deduction.
- Donations cannot be earmarked for specific individuals.
- All donations are tax deductible to the extent by the law. Tax-benefit donation forms will be supplied to donors.

Modified 11/09/17