



## Chaplain's Emergency Fund (CEF) Policy & Procedure

<b>Functional Area:</b> Office of the Chaplain	<b>Date Issued:</b> September 21, 2021
<b>Applies To:</b> All Faculty, Staff, and Contract Workers	<b>Page(s):</b> 5
<b>Policy Reference(s):</b> N/A	<b>Governance Body:</b> CEF Operations Committee

### 1. **Responsible Person**

The University Chaplain is responsible for maintenance of this policy, and for responding to questions posed regarding this policy.

### 2. **Purpose/Rationale**

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

### 3. **Eligibility**

- Eligibility is limited to active students, faculty, staff, or contract workers.
- Participants must demonstrate a temporary financial hardship because of an emergent 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 illness or injury, disability, or death in immediate family. "*Temporary*" means that the person was able to manage their finances before but as a result of extenuating circumstances are unable to do so at this time. Individuals with long-term financial problems that do not meet the temporary hardship requirement may also 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, other lodging cost, 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 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 Operations Committee. Payment will be made directly to the vendor, unless it is impossible to do so.

#### **4. Limits**

- No more than \$2500 may be awarded to a faculty, staff, or contract worker during any 12 month period unless otherwise determined by the CEF Operations Committee.
- No more than one application per faculty, staff, or contract worker 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.
- 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 website – [chaplain.wfu.edu](http://chaplain.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 CEF Operations 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 \$2500.00 unless otherwise determined by the CEF Operations 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 email to: [beckmapp@wfu.edu](mailto:beckmapp@wfu.edu).

- The Office of the Chaplain will verify the contact information and the minimum 90 days of satisfactory service via WORKDAY or with a WFU Human Resources representative. The HR office does not approve/deny requests.
- Once verified, an email will be sent to the CEF Operations Committee with the information and request for each applicant for review. The committee receives the request and information about the life altering event in a narrative format without information specific to the identity of the person making the request. Committee members are to return an email in the time specified with approval or denial of each applicant. During times when remote work is advised, the Chaplain or Office Manager will communicate to members of the CEF Operations Committee via email or online meetings for review of applications. A simple majority is required to approve an application. Once a decision is made on an applicant, the Chaplain will mark the applicant approved in the google sheet for the Chaplain's Emergency Fund. The requester's name and contact information will be kept confidential throughout the Chaplain's Emergency Fund review process.
- This CEF Operations Committee is a decision-making body that provides guidance and oversight for the overall operations of the Chaplain's Emergency Fund. The Committee will include:
  - Office of the Chaplain Office Manager, Co-Chair
  - University Chaplain – Tim Auman, Co-Chair
  - Division of Campus Life Human Resources Partner
  - Elder Law Clinic of the WFU School of Law representative
  - Financial Services representative
- Participation on the Operations 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.
  - Compliance with IRS guidelines will be determined by Wake Forest University Financial Services through cooperation with independent auditors.
- The Chaplain's Emergency Fund Operations Committee will respond to each request on a case-by-case basis as needed 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 directly through paying an invoice on the faculty, staff, or contract worker's behalf or by providing a gift card for groceries or check as needed.

**7. Notification of Decision**

Faculty, staff, or contract workers will be notified of decision by e-mail or phone within ten days after the faculty, staff, or contract worker's completed application and documents have been received.

8. All decisions made by the CEF Operations Committee are final.

9. Faculty, staff, or contract worker's emergency funds will be documented in the Office of the Chaplain's records, but will not be included as any part of the faculty, staff, 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, or online donation.
- 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 9/21/2021