

## Scholarship and Benevolence Policy

Policy: The assembly shall have a policy that addresses the granting of Awakening Together (AT) scholarships and benevolence funds and addresses the procedures regarding the distribution of those grants. The eligibility qualifications for the granting of scholarship benefits and/or benevolence funds require that an applicant be a member of AT. The annual budget for AT's Scholarship and Benevolence grants collectively shall not be less than 5% of AT's annual revenues. The President-Minister shall recommend to the Member Board the allocation of scholarships and benevolence funds in the below listed categories. (Reference the Procedures.) The Member Board is the final authority on the allocation of scholarships and benevolence funds within any constraints that may be set by the Board of Directors.

In the case of designated donations, the Board of Directors may delegate authority to follow the request of the donor that his/her donation be added to a specified scholarship or benevolence budget. Consistent with IRS guidelines, a donor may not designate that a particular individual or family receive the benefit of the donated funds.

### Procedure I: Special Assemblies Scholarships

- A) The Scholarship Subcommittee shall determine award of Special Assembly Scholarships according to the current scholarship budget. Typically, the subcommittee will require an awardee to pay the deposit portion of the event's registration fee; the remainder or any portion of the remainder may be awarded as a scholarship as determined by the subcommittee.
- B) For maximal consideration, an applicant should submit a scholarship application at least 6 weeks prior to any AT special assembly (retreat, pilgrimage, etc.) since the first meeting of the Scholarship Subcommittee may convene 6 weeks prior to the event. All scholarship applications for an AT scheduled event must be received not less than 4 weeks prior to the event.
- C) All applicants will receive e-mail verification from the Scholarship Subcommittee acknowledging that their application has been received.
- D) The Scholarship Subcommittee will receive and consider equally all AT scheduled event scholarship applications submitted to the subcommittee in a timely fashion.
- E) An applicant that has been awarded a scholarship for an AT special assembly must register and pay the required deposit for the event within 10 days of being awarded scholarship benefits. If the subcommittee has waived the deposit, the awardee must register for the event within 10 days of being awarded scholarship benefits in order to claim those benefits. The scholarship will be considered forfeited if the applicant has not registered within 10 days.
- F) In the evaluative process of awarding scholarship benefits, with all other factors being equal, the Scholarship Subcommittee will give priority to those applicants who have not received scholarship assistance within the last 2 years.

## Procedure II: Ministerial Preparation Program Scholarships

- A) An applicant must submit a scholarship application to the President-Minister prior to registering for the class or program for which the scholarship will apply. The President-Minister will consider all requests equally and make a determination as to the awarding of MPP Scholarships.

## Procedure III: AT Course Scholarships (Not MPP)

- A) An applicant must submit a scholarship application to the Scholarship Subcommittee prior to registering for the class or program for which the scholarship will apply. The subcommittee will consider all requests equally and make a determination as to the awarding of AT course scholarships.

## Procedure IV: Book & Resources Scholarships

- A) The President-Minister or any person so designated by the President-Minister (such as an administrative assistant or bookstore manager) will approve requests for free books and similar resources (e.g., Cds, DVDs) based on the approved budget. An email or other written request will suffice as an application for a book or resource scholarship.

## Procedure V: Benevolence Funds

- A) Awakening Together will grant benevolence funds to:
  - i. Help ensure that the primary needs of its members are met. Primary needs are those necessary for physical, emotional, and spiritual survival: food, shelter, clothing, transportation, counseling, etc. The more primary the need, the greater the likelihood the Benevolence Subcommittee will consider using Awakening Together funds to meet or to help meet that need.
  - ii. Provide charitable donations to organizations that are involved in serving the greater good such as feeding the hungry, assisting the poor, housing orphans, caring for mistreated animals, etc. The request must be submitted by a member who is willing to act as the organization's internal sponsor and work with the Benevolence Subcommittee to access the information it needs to review the request and pay funds, if the subcommittee approves funding.
- B) The Benevolence Subcommittee shall determine award of benevolence funds according to the current benevolence fund budget.
- C) Members requesting the granting of benevolence funds must complete an application detailing the specific need/request and submit the application to the Benevolence Subcommittee.
- D) The Benevolence Subcommittee will consider the following criteria in helping members financially:
  - i. The individual has a demonstrated need.

- ii. The individual is unable to earn sufficient funds to support all his/her needs.
  - iii. The individual's family resources are not available or sufficient.
  - iv. Government assistance is not available or sufficient.
  - v. The individual has used his/her personal resources until they are relatively exhausted. (The Benevolence Subcommittee may consider all reasonable factors in determining whether this factor is met. Persons requesting assistance should not be left totally destitute before they are eligible.)
  - vi. The individual has demonstrated that s/he can make thoughtful decisions about his or her resources. If not, financial counseling may be a prerequisite before receiving any financial help.
- E) The Benevolence Subcommittee will consider the following criteria in helping organizations that serve the greater good:
- i. If the organization is an American organization, it must be an approved 501(c)3 organization with a reputable financial and service history.
  - ii. If the organization is not an American organization, it must be a valid service organization with a reputable financial and service history.
- F) The Benevolence Subcommittee will meet twice monthly with ad hoc meetings to be called in response to particularly emergent requests. The subcommittee chair will cancel regular meetings if there are no requests to consider. Members should generally not expect to hear how their request will be resolved for approximately 10 days.
- G) Consistent with IRS guidelines, for each request for which funds are disbursed, the subcommittee will prepare a case summary report detailing the request and how the funds were disbursed.
- H) For Benevolence Subcommittee accountability purposes, checks will only be written to the final recipient of the finances. That is to say, checks will be written to meet the specific need, not to provide undesignated cash. In most cases, checks will not be written to the individual requesting assistance. Gift cards may be issued in lieu of checks when appropriate (such as for groceries, clothing, auto maintenance, etc).
- I) If a member has received benevolence funds within the past 2 years, he/she will be awarded additional funds only in the most extreme circumstances.
- J) A member may make more than one request for benevolence funds on behalf of organizations serving the greater good.
- K) Benevolence funds may be awarded to an organization serving the greater good on an ongoing and regular basis, as determined by the Benevolence Subcommittee.
- L) Each case's Summary Report and all other forms and applications will be kept on file in the assembly's home office for a period of no less than 5 years. These reports will be marked "Confidential" and access will be limited to the Benevolence Subcommittee, the President-Minister and the Board of Directors of Awakening Together.