Poor Box Best Practices

Purpose

The Poor Box exists to provide short-term financial assistance to individuals or families in need within the parish and local community, as an expression of Christian charity. These charitable donations should support the Church's work of evangelization, catechesis, social justice, and institutional development locally, nationally, and worldwide – including emergency disasters. This assistance generally takes the form of grants to individuals or to verified 501(c)3 tax-exempt charitable organizations.

Funding Source

Funds come from designated donations, special collections, or offerings specifically earmarked for charitable assistance.

Eligibility

Grants to Individuals

Recipients of Individual grants must demonstrate financial need for which the determination of financial need is based on consistent, objective criteria. To help with both choosing recipients and justifying their qualifications, the parish needs to maintain documentation of each charitable grant. The documentation should include the following to the extent possible:

a) The name, address, and amount distributed to each recipient;
b) A description of the assistance provided (i.e., for what purpose);
c) How the recipients were selected, including who makes the selection; and
d) Any relationship between a recipient of relief funds and key employees of or substantial contributors to the Archdiocese.

Priority should be given to parish and local community members, but assistance may also be extended to non-members in urgent need.

- Requests must be for basic necessities such as food, housing, utilities, or medical needs.
- Assistance is intended as temporary help, not ongoing financial support.

Grants to Charitable Organizations

Organizations who are recipients of grants should be verified 501(c)3 tax-exempt charitable organizations. Priority should be given to local and wider community members, but assistance may also be extended to national or global organizations in times of unexpected need. These organizations should support Catholic Values and provide assistance with basic necessities such as food, housing, utilities, or medical needs. Each organization should be fully vetted and determined to be in compliance with the norms of the Catholic Church. Documentation of the organization should be maintained to include those criteria listed above.

Approval Process

- Requests are reviewed by the pastor and/or a designated committee.
- Documentation (such as bills or proof of need) should be maintained with the disbursement record
- A limit is set (e.g., up to $300 per request or $500 per household per year) unless special approval is granted.

Distribution of Funds

- Payments must be made directly to Charitable Organizations or in the case of grants to individuals, to service providers (e.g., utility company, landlord) rather than given as cash to an individual.
- In emergency situations, exceptions may be made at the pastor's discretion.

Confidentiality

All requests and assistance provided to individuals are treated with strict confidentiality to protect the dignity of recipients.

Accountability and Reporting

- Organizational beneficiaries (ie. Catholic Charities) of the weekly poor box collection should be published in the bulletin and online prior to the collection.
- Periodic reports (without identifying details) are provided to church leadership or finance committees.
- Periodic reporting to donors (parishioners) on charities selected and paid on a consistent basis.
- Every parish has a fiduciary responsibility to disburse donations in line with donor intent. Holding those funds and not distributing them on a timely basis could be seen as a misuse of funds. Therefore, balances should not be carried over from year to year. The only exception is for established programs like Haiti where a timeline of disbursement has been established and communicated to donors. Amounts beyond what will be disbursed within the next fiscal quarter and should not be held except for rare instances approved by the pastor in writing.
- The Poor Box should not be used as a method for parishioners to give to the parish to avoid Cathedraticum. Any known parishioners giving this way should be counseled on the needs of the parish, the use of Cathedraticum and the importance of unrestricted stewardship.

Best Practices

- Development and communication of a standard list of charitable organizations that have been fully vetted and will receive scheduled contributions based on budgeted Poor Box Revenue. An amount can be held back for emergency grants to individuals.
- Grants to Individuals should be monitored and should not be recurring. Individuals requesting ongoing assistance should be referred to an agency such as Catholic Charities that can assist them with ongoing support.

- Quarterly review of the amounts collected to ensure quarterly contributions are sufficient to cover planned disbursements.
- Mid-June review of all collections and disbursements in order to properly adjust planned disbursements to equal funds received. Any exceptions should be scheduled for disbursement in the following quarter.