

Concur Helps – Ministry Purpose

Acceptable Ministry Purposes for common expenses:

- 1 to 1 Discipleship –*student discipleship, or someone you’re mentoring/discipling*
- Regional Staff Meeting (or Campus Staff Meeting, etc) –*common ministry meetings (weekly, monthly, etc)*
- Staff Evaluation (or Staff Discipleship, Training, etc) –*supervisor to staff discipleship, evaluation, training, ministry feedback*
- Donor appreciation –*taking a donor to a thank you meal, gift (subject to \$25 limit), entertainment event*
- Staff Retreat (or Team building, etc) –*Staff team renewal /strengthening getaway*
- Bible Study –*investigative bible study for students or others being ministered to*
- Outreach Ministry –*evangelism, etc*
- Staff Training Conference. –*Most Conferences you would attend. In the comments put the name of the conference and a general purpose of the conference. You can easily copy and paste the same comments into each related expense.*

***Feel free to use more detailed ministry purpose descriptions as well.**

Ministry Purpose Tips

- ❖ Ministry purpose should answer the question “Why?” not “What?”
- ❖ When in doubt, put more explanation in the “Comments” field to help reviewers better understand your situation.
- ❖ If you have had a Concur report returned for incorrect / unacceptable ministry purpose, but think your ministry purpose is still valid, try re-submitting it with more details in the “Comments” field. Lack of details often leads to lack of understanding by those who review your report.

- **Attendees tips**

- List attendees at your meeting or 1-to-1 whether you paid for them or not.
- Getting a coffee or meal by yourself to work on Bible study or planning does not count as an acceptable ministry expense (unless you are travelling – then choose “Business Travel” as the expense type).

- **Gifts – To Staff**

OK

- Christmas gifts under \$100 – as long as it is for staff who work FOR you, and you give the same type of gift to all staff under you. (e.g., similar food basket for all staff under you).
- Gift cards under \$100 (will be treated as taxable income for the recipient)
- Taking them out to a meal as appreciation for a special project – list as Entertainment-Employee
- Special award for years of service or for a departing staff (5 year minimum) – list as Awards
- Gift up to \$25 if given to someone who is both a donor of yours as well as staff, given for purpose of donor thanks
- Honorarium to thank them for a special project or conference work. This will affect their W2 as taxable salary

Not OK

- Gifts for weddings, baby births, birthdays – events of a personal nature
- Gifts over \$100 (except for service awards – see above)
- Buying multiple gift cards in advance without specifying who will receive the card. Specify who the gift is for in Concur

- **Gifts – To non-staff**

OK

- Donor thank-you gifts under \$25 (includes gift cards) per family, per year
- Ministry-related gifts to students up to \$25 (includes gift cards)
- Taking donors or students out for a ministry thank-you or purpose – list as Entertainment-Public or Donor
- Flowers over \$25 as a thank you or sympathy

Not OK

- Gifts for weddings, baby births, birthdays – events of a personal nature
- Gifts over \$25

- **Entertainment**

- Meals or coffee are the best way to meet with someone in ministry or who you are ministering to
- If you take someone you disciple out for something other than a meal (e.g. entertainment event), you must give more details in the comment section or it could be denied. You must also have a spiritual conversation or at the least invite that person to a Bible Study or other Nav function

- **Mileage**

- List trip in details in the comment section if reporting mileage in lump sums (e.g. “5 Bible Studies, 6 One to Ones, 2 Fundraising Events = 150 miles”)

- **Approval process and timing**

- Concur reports are generally paid every Friday (once they are approved by APC)
- Once you submit your report -If your report is \$250 or more, it goes to your supervisor for approval. Your supervisor has up to 5 days to approve. Once your supervisor approves the report, it then goes to APC for review
- Your Concur report may take up to two weeks to be approved
- If your report is sent back by your supervisor or APC, you will have to resubmit it with the necessary changes before it can be processed. Including more comments the first time often helps reports get approved the first time