

LIFEWISE ACADEMY



PROGRAM HANDBOOK



2024.01

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CONTENTS

INTRODUCTION

100 LEADERSHIP

- 101 Leadership Board
 - 101.1 Member Qualifications
 - 101.2 Group Makeup
 - 101.3 Board Member Responsibilities
 - 101.4 Meeting Protocol and Guiding Principles
 - 101.5 Resignation
- 102 Program Director
 - 102.1 Hiring Process
 - 102.2 Responsibilities
 - 102.3 Training and Support
- 103 Teachers
 - 103.1 Recruiting and Hiring Process
 - 103.2 Training and Support
 - 103.3 Curriculum
 - 103.4 Connecting Students to Churches
- 104 Drivers
 - 104.1 Screening and Certification
- 105 Volunteers
 - 105.1 Recruiting and Screening
 - 105.2 Roles
 - 105.3 Training
 - 105.4 Appreciation

200 LOCATION

- 201 Facility
 - 201.1 Guiding Principles
 - 201.2 Facility Type Options
 - 201.3 LifeWise Facility in a Church
 - 201.4 Required and Recommended Supplies
 - 201.5 Safety and Security
- 202 Transportation
 - 202.1 Vehicle Considerations
 - 202.2 Vehicle Purchase Arrangements
 - 202.3 Vehicle Wrapping
 - 202.4 Vehicle Insurance and Maintenance
 - 202.5 Accidents and Breakdowns

300 LOGISTICS

- 301 School Relations
 - 301.1 Primary Point of Contact
 - 301.2 School Staff Appreciation

- 301.3 Program Growth/Expansion
- 302 Enrollment
 - 302.1 Permission Form Options
 - 302.2 Roster and Attendance
 - 302.3 Additions and Withdrawals
 - 302.4 Boosting Enrollment
 - 302.5 School Year Updates
- 303 Policies
 - 303.1 Policies and Procedures
 - 303.2 Classroom Safety and Team Member Conduct

400 LOOT

- 401 Finance
 - 401.1 Financial Structure
 - 401.2 Budgeting
 - 401.3 Expenses and Reporting
 - 401.4 Non-Donation Revenue
- 402 Trustraising
 - 402.1 Guiding Principles
 - 402.2 Kickoff Campaign
 - 402.3 LifeWise 101
 - 402.4 Church Presentations
 - 402.5 Annual Fundraising Event
 - 402.6 School Approval Matching Grant
 - 402.7 Donation Management
 - 402.8 Cash Handling

500 LANGUAGE

- 501 Prayer Team
 - 501.1 Establishing and Maintaining Prayer Support
- 502 Communications
 - 502.1 Brand Ambassadorship
 - 502.2 Social Media, Webpage and Email
 - 502.3 Newsletters and the Media
- 503 Community Outreach
 - 503.1 Church Updates
 - 503.2 Community Events

600 OPERATIONS

- 601 Systems
 - 601.1 Salesforce
 - 601.2 HR Butler
 - 601.3 Protect My Ministry
- 602 Support
 - 602.1 Resource Hub and Ticketing System
 - 602.2 Program Coaching

INTRODUCTION

We're glad you're here! We consider your presence, as part of LifeWise Academy, a blessing from God and are committed to coming alongside you so that together we can effectively reach the next generation with the gospel.

This LifeWise Program Handbook is intended to provide policies and procedures for operating a LifeWise Academy program. For information about LifeWise's foundational concepts and general policies, refer to the LifeWise Policy Manual. Specific policies and procedures may be communicated to you verbally or in the form of written procedure statements. No statement, information or policy set forth in this handbook is intended to be, nor does it constitute, a contract between LifeWise and any individual. Although extensive, this Program Handbook is not exhaustive. Many more resources are available via the [LifeWise Resource Hub](#) [support.lifewise.org].

The policies and practices described in this manual are subject to change from time to time, with or without notice, at the sole discretion of LifeWise, who reserves the right to modify, supplement, rescind or revise any policy, benefit or provision as it deems necessary or appropriate. Any understanding or agreements that in any way contradict this handbook are invalid unless they are in writing and executed by the proper individuals.

100 – LEADERSHIP

101 Leadership Board

The objective of the Leadership Board is to complete Launch Steps 8-9 and then oversee the operation of the live program.

101.1 Member Qualifications

Every Board member should have a proven track record of exemplifying the two LifeWise Core Values:

- ◆ **Commitment:** Members are motivated by their love for the Lord and are all in. They are fully supportive of the gospel-centered purposes of a local LifeWise program.
- ◆ **Competence:** Members have the know-how, skills and relationships to get stuff done.
- ◆ **Resource:** [Core Values](#)

Every member is also asked to agree with the LifeWise [Statement of Faith](#). During the application process, Board members will be asked to acknowledge that they have read and agree with this document during the onboarding process. They will also be invited to interview.

101.2 Group Makeup

The Leadership Board should initially be assembled by the Program Director. Potential Board members apply at lifewise.org/leadershipboard. The Leadership Board should include:

- ◆ No fewer than three members and no more than nine
- ◆ Representation of the entire Christian community of various churches, ages, professions, genders, races, etc.
- ◆ One member responsible for each of the 5 L's: Leadership, Location, Logistics, Loot and Language. Individual Board members may be responsible for more than one L.
- ◆ Board members are encouraged to form smaller groups or committees with additional community members to assist in key areas. It is recommended that only official Board members, or a designated committee representative, attend Board meetings.

101.3 Board Member Responsibilities

The Leadership Board, in conjunction with the Program Director, is responsible for overseeing the 5 L's of LifeWise operations. See Program Organization Chart for a visual representation of where the Board fits into a LifeWise program.

- ◆ **Resource:** [Program Organization Chart](#)

Every member is asked to:

- ◆ Complete the screening process, including a background check and child safety training
- ◆ Agree to the LifeWise Statement of Faith
- ◆ Be faithful in attending scheduled meetings
- ◆ Actively participate in the local fundraising process
- ◆ Commit to a minimum of one year of service
- ◆ Be consistent in prayer for the local program
- ◆ Complete the corresponding role-specific LifeWise training course

Launch Responsibilities

During Step 9, the Program Director and Leadership Board manage the [T-Minus Plan](#). Board member roles include:

- ◆ **Leadership:** Recruiting and onboarding of teachers and volunteers
- ◆ **Location:** Researching, securing and preparing a facility and securing vehicle transportation (if applicable)
- ◆ **Logistics:** Coordinating details and maintaining positive communications with the school
- ◆ **Loot:** Spearheading the fundraising effort (Loot Leader); managing finances (Ledger Leader)
- ◆ **Language:** Ensuring all public communications are excellent and contain proper messaging

Live Program Responsibilities

During Live operations, Leadership Board members provide input and direction to the Program Director as he/she manages the day-to-day operations of the program. Board members also assist in overseeing the 5 L's of LifeWise Operations.

- ◆ **Resource:** [Leadership Board Roles](#)

101.4 Meeting Protocol and Guiding Principles

- ◆ **Meeting Protocol:** The Leadership Board should meet weekly during Launch Steps 8 and 9, and monthly or quarterly once the program is live. The following sample agenda is provided as a guideline for meetings:
 - ◇ **Prayer:** Begin with prayer, asking for wisdom and positive and productive discussions.
 - ◇ **Update:** Review any action steps from previous meetings. Walk through the 5 L's to summarize what's been accomplished since the last meeting. Note whether progress for each area remains on track.
 - ◇ **Plan:** Address and plan for each of the 5 L's. Decide the specific things that need to be accomplished.
 - ◇ **Action Steps:** Decide "who does what by when." Clearly define specific actions to be completed and who will be responsible for them. Ask for updates on those items during the next meeting.
 - ◇ **Prayer:** End with prayer, committing your discussion and action steps to God.
 - ◇ **Resource:** [Leadership Board Meetings](#)
- ◆ **Team Dynamics:** How Board meetings are run is largely a local decision. The LifeWise Support Center recommends operating with the Program Director serving as somewhat of a Chief Executive Officer, making decisions for the program with advisory input from the Board. It is recommended the Program Director consult and defer to the Board on key issues. If an issue arises among the Board regarding the Program Director, it is recommended the Board select one of its members to reach out to the Support Center for assistance in resolving the issue.
- ◆ **Expectations Agreement:** We encourage Board members to sign an expectations agreement using the form below.
 - ◇ **Resource:** [Advisory Board Expectations Agreement](#)
 - ◇ **Resource:** [Advisory Board Agreement Preview](#)
- ◆ **Tenure:** Tenure of Board members will be determined locally. Generally, we recommend a Board member commit to serving with the group until the end of the coming/current school year. It is also our recommendation that if a member needs to step aside, they would actively assist in finding a replacement if at all possible.
 - ◇ Board members may be removed at any time for any reason based on the reasonable discretion of a LifeWise employee or officer. Grounds for removal include misconduct, inadequate performance and no longer agreeing to the LifeWise Statement of Faith.

- ◆ **Conflicts of Interest:** A local process should be enacted by which the types and names of other organizations with which Board members are involved can be reviewed for perceived conflicts of interest.
- ◆ **Annual Planning:** Collecting annual feedback and conducting an annual planning session can have a tremendous impact on the overall effectiveness of a LifeWise program.
 - ◇ **Resource:** [Annual Goal-Setting Guidelines](#)

101.5 Resignation

If a Board member decides to resign from the Board, he or she must submit this [Resignation Form](#).

102 Program Director

The Program Director is vital to the success of a LifeWise program. A great Program Director will gather the best leaders and help team members work together effectively. The Program Director should display the following qualities:

- ◆ **Committed:** This value addresses the heart. Committed people have their hearts in the right place. They are motivated correctly and are all in, fully supportive of the gospel-centered purposes of the LifeWise program in their community.
- ◆ **Competent:** This value examines the abilities, skills and know-how to accomplish the actual work that would be entrusted to whoever is appointed as Program Director.
- ◆ **Well-Respected:** The person who leads the LifeWise program should be a respected name in the community. You want to find someone whom people in your community know and look up to, who has the general trust of the community at large.
- ◆ **Good Communicator:** The Director must be a good communicator. This skill is less about being a good presenter (though that is helpful) and more about someone whose words and manner draw people together. This person should be able to assemble and unify their team, to clearly delegate and keep their team on track and to utilize the best methods of communication, in person and electronically, to keep everyone on the same page.

102.1 Hiring Process

When seeking the right Director, look for a person who has caught the vision of LifeWise and will passionately drive it forward. Take the time to pray for and recruit the best person for this job.

- ◆ **Recruit:** The Program Director may emerge organically as a leading member of the Steering Committee from Steps 4-6. If not, the Steering Committee should seek potential candidates from the local church community. The need can be communicated via church announcements, social media and word of mouth.
 - ◇ **Resource:** [Program Director Job Description](#)
 - ◇ **Resource:** [Finding the Right Director](#)
- ◆ **Solicit Applications:** Potential candidates should be directed to complete a background screening at lifewise.org/background and an application at lifewise.org/directorapplication.
- ◆ **Review Applications and Conduct Interviews:** The Program Coach will receive applications and conduct initial interviews with candidates. Then, the local team will conduct interviews and make a recommendation to the Coach, including the program's address and the candidate's personal email address, pay rate to be offered, estimated working hours per week and start date. The Program Coach will initiate an offer letter.
 - ◇ **Resource:** [Interview Guide](#)
 - ◇ **Resource:** [Program Director Candidate Evaluation Form](#)

- ◆ **Onboard:** I-9s must be completed prior to the employee's start date. The HR team will initiate the onboarding process for the candidate, upon completion of their offer letter. This process will include HR Butler onboarding, Form I-9 completion. Keep in touch with the candidate to ensure that their onboarding tasks are completed.
- ◆ **Train:** During the onboarding process, Directors will receive a Training Plan including links to training courses, handbooks and other resources.

102.2 Responsibilities

The Director manages the day-to-day operations of the program. Those responsibilities span all areas of Leadership, Location, Logistics, Loot and Language. The Director is also responsible for coordinating with the Support Center.

- ◆ **Resource:** [Program Director Job Description](#)
- ◆ **Resource:** [Teacher and Director Responsibilities](#)

Note: Volunteer Directors must request assistance from their Program Coach in initiating offer letters and signing legal documents such as I-9s and documents at the BMV.

Managing Staff

In addition to hiring staff, the Program Director is responsible for managing their local team, including training and monitoring the performance of each team member. Submit a [Role Form](#) when assigning roles (e.g., Newsletter Writer or Expense Admin) to Board members. *Note: It is not a requirement for the Program Director to be on site for all classes.*

Conflict is common in most organizations because of our fallen nature and the disagreements and misunderstandings that come with working with others. Every attempt should be made to follow the biblical example of conflict resolution as found in Matthew 18. If the issue is not resolved after meeting to discuss the conflict, a Leadership Board member or other third party can be asked to mediate. If a resolution is still not found, the Director should reach out to their Program Coach.

- ◆ **Resource:** [Local Conflict Resolution Support Process](#)

If a team member's performance falls below expectations, a performance improvement plan may be needed. Be sure to follow all performance and discipline-related calls with an email, and copy hr@lifewise.org on these emails for documentation. After drafting the performance plan, it's important to review it with your Program Coach and the LifeWise Human Resources Team before presenting it to the employee.

- ◆ **Resource:** [Performance Improvement Plan](#)

Termination may be required if little effort or progress was made on a performance improvement plan or if disciplinary measures for misconduct need to be escalated. Work closely with your Program Coach throughout this process to determine the next best steps. If it is decided that next steps include termination, you or your Program Coach should contact the HR team prior to having any conversations about termination with the employee. An HR staff member must be part of sharing the news of termination with any employee.

102.3 Training And Support

LifeWise Director training and support is provided via several means:

- ◆ Child safety training
- ◆ The Resource Hub: support.lifewise.org

- ◆ Regular program visits conducted by Support Center staff
- ◆ Monthly virtual Program Director meetings
- ◆ Ongoing virtual and live training opportunities, including Program Director Bootcamp
- ◆ Online training courses
 - ◇ Create an account with your name as your username (this allows us to see who has completed which trainings)
- ◆ Annual LifeWise Summit
- ◆ [Program Director Facebook group](#)
- ◆ Program Director Salesforce Dashboard

103 Teachers

A LifeWise Teacher should demonstrate in-depth Bible knowledge and outstanding teaching abilities. The ideal candidate is an active church member with excellent communication and interpersonal skills who is caring, perceptive and proficient in teaching children.

103.1 Recruiting And Hiring Process

- ◆ **Recruit:** The Leadership Board and Program Director should seek potential candidates from the local church community. The need can be communicated via church announcements, social media and word of mouth. Both regular and substitute teachers will be needed.
 - ◇ Resource: [Teacher Job Description](#)
 - ◇ Resource: [Lead Teacher Job Description](#)
 - ◇ Resource: [High School Teacher Job Description](#)
 - ◇ Resource: [Substitute Teacher Job Description](#)
- ◆ **Solicit Applications:** When potential candidates have been identified, they should be directed to complete a background screening at lifewise.org/background and complete the Teacher Application at lifewise.org/teacherapplication or the Substitute Teacher Application at lifewise.org/substitute-teacher-application.
- ◆ **Review Applications and Conduct Interviews:** Completed applications will be sent to the Program Director and Leadership Board for review. After careful review of the application(s), Leadership Boards should conduct interviews and select the most qualified candidate(s). Then, the Program Director will notify candidates of the hiring decision.
 - ◇ Resource: [Interview Guide](#)
- ◆ **Offer of Employment:** When the hiring decision has been made, the Program Director will provide the teacher with a job offer letter.
 - ◇ Resource: [New Hire Checklist](#)

103.2 Training and Support

LifeWise Teacher training and support is provided via several means:

- ◆ Child safety training
- ◆ The Teacher Resources Page: lifewise.org/teacherresources
 - ◇ This page is password protected; the password can be requested through a support ticket
- ◆ [Teacher Training Plan](#)
- ◆ [Teacher Certification – Part 1](#)
- ◆ [Teacher Certification – Part 2](#)
- ◆ LifeWise Academy Teachers' Lounge Facebook Group
- ◆ LifeWise Academy Teachers' Lounge virtual meeting
- ◆ LifeWise Teacher's Link Newsletter

- ◆ Annual LifeWise Summit
- ◆ Local Policy and Procedure Training
- ◆ [Teacher Handbook](#)
- ◆ Teacher observations can be done by Program Directors, Director Mentors or Program Coaches at least once per year
 - ◇ **Resource:** [Teacher Observation Guide](#)
- ◆ Program Directors may make a clone of the [Teacher Feedback Form](#) and send it to teachers toward the end of the school year

103.3 Curriculum

Elementary

- ◆ **Foundation:** The foundation for LifeWise Elementary Curriculum is The Gospel Project (TGP), a Christ-centered, chronological Bible study program produced by LifeWay. TGP focuses on “God’s plan to rescue His people from sin through the life, death and resurrection of His Son, Jesus Christ.” We draw from and build on the lessons and activities provided by TGP. Tied to each lesson is a specific character trait that, as we are changed by the gospel, becomes more evident in our lives. Over the course of five years, the Elementary Curriculum guides students through the entire Bible.
- ◆ **Availability:** Electronic files of our Elementary Curriculum are available for download on the Teacher Resources Page: lifewise.org/teacherresources. Posters and Recap Cards are available for purchase at lifewise.collaterate.com.
- ◆ Please note that LifeWise Curriculum should be the main component of all LifeWise classes

Middle School

- ◆ In partnership with The Gospel Project, LifeWise Academy provides a high-quality, gospel-centered Middle School Curriculum. The full Middle School Curriculum is contained in three years, each of which comprises around 35 lessons:
 - ◇ **Year One:** The Law and the Prophets (38 lessons)
 - ◇ **Year Two:** The Life and Teachings of Jesus (35 lessons)
 - ◇ **Year Three:** Living Out Jesus’ Mission (39 lessons)
- ◆ **Resource:** [Middle School Curriculum](#)
- ◆ **Resource:** [Middle School Pass/Fail Course Criteria](#)

High School

- ◆ LifeWise offers two [High School Course Options](#):
 - ◇ **Biblical Worldview:** In partnership with Summit Ministries, this curriculum covers the foundations of the Christian faith. *Foundations* introduces a biblical worldview within the historical truths of creation, the fall, redemption and the restoration of God’s people, as well as describing how to develop a personal relationship with Christ.
 - **Resource:** [Biblical Worldview Course Details](#)
 - ◇ **Christianity, Culture and Worldview (THE 1010):** This 3-credit college course is provided by Ohio Christian University in a fully online format. All LifeWise students are a part of LifeWise-only sections of the course.
 - **Resource:** [Ohio Christian University and LifeWise Procedures](#)
 - **Resource:** [Christianity, Culture, and Worldview Course Details](#)

Note: All LifeWise materials and Curriculum are owned by LifeWise and shall be used exclusively in LifeWise classes. Unauthorized use or distribution of these materials is strictly prohibited and may result in legal action as deemed necessary by LifeWise Academy. By accessing and using LifeWise Curriculum and materials, you acknowledge and agree to this statement.

Faith and Practice in the Classroom

Although LifeWise is not affiliated with a particular denomination of Christianity, we realize during the course of LifeWise classes certain theological or denominational issues may arise. The LifeWise policy is that we do not teach an official position on any of these theological or denominational issues. If any of these issues come up in class, whether through curriculum or discussion, we will make it clear to students that these are secondary issues which many well-meaning Christians and churches disagree about and that LifeWise, as a program, does not have a particular stance on the issues.

- ◆ Resource: [Difficult Questions from Students](#)

103.4 Connecting Students to Churches

We understand that LifeWise Academy is not a local church. However we aim to serve local churches as an effective tool they can wield in their mission to reach their communities. We will look for every opportunity to strategically connect students and their families to the broader ministry of local churches.

- ◆ Resource: [Connecting Students to Churches](#)

104 Drivers

104.1 Driver Screening and Certification

If the vehicle seats more than 15 passengers, the driver must have a Commercial Driver's License (CDL). In the event that a program loans a LifeWise-owned vehicle to a third party, have the individual planning to drive the vehicle complete the Driver Screening Form (linked below).

- ◆ Resource: [Vehicle Driver Screening Form](#) (ONLY for loaning vehicles to a third party)
- ◆ Resources: Vehicle Driver [Job Description](#), [Offer Letter](#) and [Volunteer Agreement](#)
- ◆ Resource: [Driver Resources](#)

Age Requirements

Drivers must be between the ages of 21 and 80 years old. Drivers who are over the age of 75 are required to submit additional documentation as follows:

- ◆ **Van Drivers over the age of 75:** Submit an annual Physician's Statement via support ticket
- ◆ **CDL Licensed Drivers over the age of 75:** Submit a copy of their CDL license annually via support ticket

Other Qualifications

Drivers operating LifeWise vehicles must:

- ◆ Have completed the LifeWise Volunteer Team background screening and child safety training
- ◆ Have a current, valid state driver's license
- ◆ Have been continuously licensed for the past three years
- ◆ Obtain the proper commercial license endorsements for the vehicle being operated (if required)
- ◆ Have no record of Driving Under the Influence (DUI), driving with a suspended or revoked license or reckless endangerment in the past 5 years
- ◆ Have proof of insurance
- ◆ Never be alone in a vehicle with a student other than his/her own child. No fewer than three persons should occupy a vehicle traveling to and from a program.

- ◆ Perform regular basic vehicle checks before operation
 - ◇ Resource: [Van Inspection Checklist](#)
 - ◇ Resource: [Bus Inspection Checklist](#)
- ◆ Maintain a roster to identify students riding in the vehicle
- ◆ All drivers with known medical conditions are required to obtain a yearly underwriter-approved Physician's Statement
 - ◇ Resource: [Physician's Statement](#)

105 Volunteers

Volunteers are essential to the success of any LifeWise Academy program.

105.1 Recruiting and Screening

The Community Interest List (CIL) is an excellent resource for identifying potential volunteers. The CIL contains a simple way for community members to indicate their interest in volunteering by selecting the “may volunteer” option. Church presentations, news articles and social media can also be very effective. Program Directors can create an online Volunteer Interest Form by making a clone of the template. After the Volunteer Interest Form has been created, the Program Director should submit the form link to the Support Center for inclusion on the program webpage.

- ◆ Resource: [Volunteer Needs Bulletin Insert Template](#)
- ◆ Resource: [Online Volunteer Interest Form](#)
 - ◇ Make a clone of this form following the instructions in [this video](#).
- ◆ Resource: [Printable Volunteer Interest Form](#)

After receiving an interest form, contact the pastor reference to verify the candidate's character and suitability for the role. Then, conduct an interview and ask the candidate to submit a background screening form at lifewise.org/background. If the volunteer or staff member has already undergone a background check through another LifeWise program (within the last three years and at the same background check level), Program Directors can submit a ticket to Human Resources to request the background check information.

Underage Volunteers

Programs can recruit underage volunteers (e.g., high school students), as long as the volunteer is at least 15 years of age. Minors do not need a driver's license or a background check, but they do need to submit an application, provide two church references and complete an interview. In addition, the parent/guardian of the volunteer must sign an acknowledgement that they are not aware of any traits or tendencies their student possesses that could pose any threat to children, youth or others.

Underage volunteers must be supervised by a screened adult team member at all times. Additionally, the partnering school should be notified of the intent to have minors volunteer in the classroom.

Underage volunteers need parental permission to volunteer for LifeWise. Use the Student Volunteer Registration template or make a clone of the Jotform.

- ◆ Resource: [Student Volunteer Registration](#)
- ◆ Resource: [Student Volunteer Registration Jotform](#)

105.2 Roles

The primary volunteer roles are chaperoning students to and from class and assisting teachers in the classroom. Other potential volunteer roles include assisting administratively, cleaning, landscaping and helping with facility or vehicle maintenance and repair.

105.3 Training

All volunteers will be asked to complete a child safety training course upon completion of their background screening. All LifeWise team members, including volunteers, are required to complete the child safety training course for the protection of the school and the program. Additionally, Program Directors should arrange for annual training to cover local policies and procedures.

- ◆ Resource: [Sample Volunteer Training Agenda](#)
- ◆ Resource: [Volunteer Training Slides](#)
- ◆ Resource: [Volunteer Handbook](#)
- ◆ Resource: [Volunteer Schedule Template](#)

105.4 Appreciation

It is imperative that the Leadership Board and/or Program Director prioritize showing appreciation for volunteers. Some ideas to show appreciation include sending cards for birthdays and/or Christmas, providing a Christmas or end-of-year gift or hosting an appreciation meal.

[RETURN TO TOP OF SECTION](#)

[RETURN TO CONTENTS](#)

200 – LOCATION

201 Facility

201.1 Guiding Principles

Two important classroom planning principles to consider are excellence and visibility.

- ◆ **Excellence:** Excellence should be the highest goal in every aspect of your LifeWise program, but especially for your location. Let excellence be the standard in order to represent the King of the Universe well and to represent LifeWise well.
- ◆ **Visibility:** A local LifeWise program weaves itself into the fabric of its community, becoming a hub for its students, schools and local churches. Make your facility visible and on display as much as you can.

201.2 Facility Type Options

There are a variety of options for housing a successful LifeWise program, each with pros and cons that must be considered.

** Please note that LifeWise does not purchase real estate for local LifeWise programs. Instead, LifeWise recommends real estate be owned by a local entity. The Support Center can provide you with resources for [filing for a 501\(c\)3](#) to act as the local entity. Be aware, however, that establishing your own 501(c)3 means that the Support Center will not provide donation and accounting services for that entity. Please talk to your Program Coach before pursuing this option.*

- ◆ **New Build:** Some local programs may opt to design and build a building specifically for their program.
 - ◇ Pros: a building that exactly fits your program's needs and expectations; full freedom for creating on-brand design and visual excellence; a clear statement to the community of the program's commitment and presence
 - ◇ Cons: expensive; may be difficult to find an accessible lot with space to build
- ◆ **Renovated Space:** This option involves remodeling an already existing building to meet your local LifeWise program needs.
 - ◇ Pros: a potentially lower cost than a new build; allows you to consider multiple or highly accessible locations where building would not be an option; still permits flexibility for creating excellent and on-brand classrooms; volunteers from local churches or the CIL can be involved in the renovation process
 - ◇ Cons: updates, design and actual renovation is still costly; may have to trade off some branding or ideal options for classroom set-up
- ◆ **Modular Classroom:** This is a pre-made building that can be purchased and placed on an approved (and ideally convenient) location.
 - ◇ Pros: a simple space that can be furnished and decorated for your specific needs; can be a temporary space while other options are considered or finished; requires less space; the entire building can be moved or sold when no longer needed
 - ◇ Cons: Costs vary based on size; very little flexibility in style or design; not permanent
- ◆ **Pop-Up Classroom:** This option allows for the creation of classroom space inside an available building, such as a church or community building, that can be assembled and torn down as needed.
 - ◇ Pros: a variety of options in nearby buildings are often available; weekday classes allow for easy scheduling around weekend or evening activities; costs or rental agreements can

be inexpensive; may include furnishings (tables, chairs, etc.); may facilitate relationships with local groups or churches

- ❖ Cons: every classroom must be constructed and torn down regularly; program is at the mercy of an outside group's rules or expectations; can make it harder to maintain church neutrality
- ❖ *Note:* You will need a signed lease agreement with the host facility, even if the host doesn't require a lease (see section 201.3)

Note: Whichever facility you decide on, a lease agreement is required. It is also a good idea to acquire a P.O. box (especially if your classroom is inside a church).

Once you decide on a facility, submit the [Site Form](#) so the Support Center can have the details.

201.3 LifeWise Facility in a Church

For many programs, the most obvious option for the LifeWise location is in a church. This arrangement can be mutually beneficial, but can also present some unique challenges.

◆ Neutrality

- ❖ One potential challenge is keeping the LifeWise program distinct from the host church. It is important to purposely and continually work toward broad support among the local churches and the community as a whole. Our desire is to see students get connected to a local church without being seen as actively endorsing a particular local church.
- ❖ We recommend considering ways to demonstrate that LifeWise is a distinct and broadly based program. For example, use a separate entrance with LifeWise signage to distinguish the local LifeWise program from the host church.

◆ Doctrine

- ❖ Holding a LifeWise program in a church will make a natural connection in the eyes of students and the community. Therefore, it is imperative that the host church adhere to the fundamental beliefs of LifeWise Academy. If holding LifeWise Academy in a church, please ensure that the church leadership is in agreement with our Statement Of Faith, Vision Statement and Philosophy and Team Member Conduct. If the leadership is not in agreement, you should seek an alternative location in which to hold LifeWise Academy.
 - **Resource:** [Vision Statement and Philosophy](#)
 - **Resource:** [Team Member Conduct](#)

Facility Lease Process

If your program will be using space owned by another organization, you will need to have a signed lease agreement in place. To obtain a signed lease agreement, follow this process:

1. Review this [Sample Lease](#) with the owner/landlord and gather a list requested changes (if requested)
 - ◆ Verify the name and title of the person with signing authority for the organization
2. Submit [this form](#), with all necessary lease information and a detailed listing of any requested changes
 - ◆ A lease will be drafted by Support Center staff, modifying the template to fit the specifications provided in the form
 - ◆ You will receive a lease agreement signed by an authorized LifeWise representative
3. Have the landlord sign the lease with notarization
4. Submit the final signed copy as a support ticket

201.4 Required and Recommended Supplies

LifeWise provides a variety of signage and other materials to transform virtually any space into a workable classroom. Use the style guide at lifewise.org/styleguide for inspiration and resources. All LifeWise programs are required to acquire a few basic supplies, which provide essential brand identity and uniformity. Required items include the following:

- ◆ Elementary Curriculum Retractable Banner *
- ◆ A-frame “Classes Today” sign *
- ◆ Name tags and lanyards
- ◆ **Resource:** [LifeWise Classroom Supply List](#)

** Note: The live startup fee covers the “Classes Today” sign and the retractable banner for programs starting in the Fall of 2023 and beyond.*

In addition to these required supplies, LifeWise recommends that each program purchase Recap Cards and Character Qualities posters to supplement each year’s lessons.

201.5 Safety and Security

Every LifeWise program must strive to maintain the highest standards of safety and security for their students, volunteers and teachers. The commitment to safety begins the moment students are released from the public school until the moment they are returned. Facility doors should be locked at all times when students are present.

Each LifeWise location will be a smoke-free facility equipped with smoke detectors, a fire extinguisher and clearly marked exits. All LifeWise facilities will meet state and local requirements and building codes. The facility will be equipped with a first aid kit and any other medical devices required by law. LifeWise strongly encourages the use of security cameras at all program facilities.

Concealed Carry

LifeWise programs should align with the concealed carry policy of their partnering school.

202 Transportation

Walking is the preferred mode of transportation when possible. A distance of 1,000 feet is the maximum walking distance recommended. Busing is also a great option when no location within walking distance is available.

202.1 Vehicle Considerations

- ◆ **Size and number of vehicles:** The size and number of vehicles needed will vary based on the needs of the program. You can purchase 15-passenger shuttles or vans as needed, but please note that vehicles that seat more than fifteen people (including the driver) require your driver to have a Commercial Driver’s License (CDL). Some communities may opt for several smaller shuttles instead of one larger one for this reason.
- ◆ **Accessibility:** Before purchasing a vehicle, your community will need to determine whether or not the shuttle needs to meet standards set forth by the Americans with Disabilities Act. If there is a need for accessibility, go the extra mile, spend the money and provide for that need right away. If there is not an immediate need for accessibility, your Leadership Board will need to determine whether to spend the money now or change vehicles in the future if the need arises.

202.2 Vehicle Purchase Arrangements

If you choose to purchase a vehicle, work through the Vehicle Needs Worksheet with your Program Coach. Vehicles will be owned by LifeWise as an asset in your local fund. If your program is selling or retiring a vehicle, submit a ticket so the insurance coverage can be removed from the vehicle.

- ◆ Resource: [Purchasing a Vehicle Checklist](#)
- ◆ Resource: [Vehicle Needs Worksheet](#)

202.3 Vehicle Wrapping

Three designs for vehicle wraps can be found at lifewise.org/stylegallery. Once you have secured your vehicle, contact the Support Center and the design team will assist you in deciding which wrap will be best for your needs and budget. Please note that you will need to provide the make and model of your vehicle along with current photos. The design team will also assist in finding a local shop with the ability to wrap your vehicle with a vinyl wrap, or you can bring your vehicle to a shop near the Support Center. Our design team will work directly with your selected shop to finalize the vehicle wrap details. Once the final touches are in place, you will schedule drop off and pickup times with the shop directly.

202.4 Vehicle Policy

Each program will need to assign a Vehicle Manager to oversee all vehicle operations, including routine maintenance and regular inspections. Additionally, programs will need to ensure the safety of passengers by following all laws and ensuring passengers follow a code of conduct. See Vehicle Policy for more details.

- ◆ Resource: [Vehicle Policy](#)
- ◆ Resource: [Behavior Expectations Template](#)
- ◆ Resource: [Bus Inspection Checklist](#)
- ◆ Resource: [Van Inspection Checklist](#)
- ◆ Resource: [Vehicle Accident Process](#)
- ◆ Resource: [Vehicle Breakdown Process](#)

Vehicle Use Contracts

Program may wish to borrow a vehicle from another LifeWise program, a church or other entity on a temporary basis. In these cases, a contract must be created.

- ◆ Resource: [Vehicle Purchasing/Leasing Process](#) (RH article)
- ◆ Resource: [Vehicle Use Agreement Request Form](#)
- ◆ Resource: [Cost Per Mile Worksheet](#)

[RETURN TO TOP OF SECTION](#)

[RETURN TO CONTENTS](#)

300 – LOGISTICS

301 School Relations

301.1 Primary Point of Contact

It is recommended that every LifeWise program establish a primary point of contact who has close ties to the school. The point of contact may be a school secretary, guidance counselor, principal or parent. The primary contact person should keep LifeWise personnel informed of school schedule changes (due to testing, field trips, assemblies, drills, etc.).

301.2 School Staff Appreciation

In order to foster ongoing relationships between LifeWise Academy and the school staff, it is recommended that LifeWise staff or board members plan events and/or gifts to show appreciation to school staff members. Some examples include providing donuts and coffee on a school day, sending thank-you notes, providing a meal during parent/teacher conferences or sending Christmas cards.

- ◆ Resource: [School Appreciation](#)
- ◆ Resource: [Teacher Gift Bag Card Template](#)

301.3 Program Growth/Expansion

Once a LifeWise program is well established in the community, opportunities may arise for LifeWise expansion to other schools within the district or in neighboring communities. We highly encourage all LifeWise programs to make every effort to “plant” new programs when possible.

When you're ready to initiate a meeting with the principal of an additional school, use the Logistical Proposal template and present it to the principal during the meeting. Include the "What Educators Need to Know" booklet and a Sample Permission Form if the principal isn't familiar with LifeWise.

- ◆ Resource: [Program Expansion Checklist](#)
- ◆ Resource: [What Makes a Healthy LifeWise Program](#)
- ◆ Resource: [Program Expansion Logistical Plan](#)
- ◆ Resource: [What Educators Need to Know](#)
- ◆ Resource: [Sample Permission Form](#)

Social-Emotional Learning Standards and LifeWise Academy

It may be helpful to provide educators with a correlation between Social-Emotional Learning standards and LifeWise Academy.

- ◆ Resource: [Social-Emotional Learning and LifeWise Academy](#)

302 Enrollment

302.1 Permission Form Options

Permission forms may be distributed to students and parents in a number of ways:

- ◆ **Online permission/registration:** Distribute an online permission form. Video tutorials are available.
 - ◇ Resource: [Online Permission Form](#)
 - ◇ Resource: [Creating Forms and Editing Settings](#)
 - ◇ Resource: [Editing Content](#)
- ◆ **Paper permission/registration form distribution:** Paper forms and cover letters can be distributed by mail, churches, outreach events or by the schools themselves.
 - ◇ Resource: [Printable Permission Form](#)
 - ◇ Resource: [Permission Form Cover Letter](#)
- ◆ **Spanish permission form and cover letter templates:** We recommend Google Translate for any minor edits.
 - ◇ Resource: [Spanish Permission Form](#)
 - ◇ Resource: [Spanish Permission Form Cover Letter](#)
- ◆ **Student Welcome Letter:** We recommend sending a welcome letter to families a few weeks before classes begin
 - ◇ Resource: [Student Welcome Letter Template](#)

Note: Some students may have shared parent/guardianship. In these cases, verify with the school that the "Custodial Parent/Guardian" language on the permission form is adequate.

Note: Store permission forms in a secure location for at least 5 years after the student leaves the program.

Field Trip Permission Forms

- ◆ Resource: [Field Trip Permission Form Template](#)
- ◆ Resource: [Field Trip Permission Form Jotform](#)

302.2 Roster and Attendance

Every LifeWise program should maintain accurate records of student enrollment and attendance.

- ◆ Resource: [Student Data Spreadsheet](#)
- ◆ Resource: [Sample Attendance Tracker](#)

302.3 Additions and Withdrawals

In general, LifeWise recommends welcoming students to join the local program at any point during the school year. LifeWise is completely voluntary, and parents have the right to withdraw their child at any time for any reason. Ask the parent to fill out a Withdrawal Form. Programs should make an effort to connect with a parent who wishes to withdraw their child to discover the reason and get feedback.

- ◆ Resource: [Student Withdrawal Template](#)
- ◆ Resource: [Student Withdrawal Jotform](#)

302.4 Boosting Enrollment

Each LifeWise program should implement various strategies throughout the year to boost enrollment. Community events, social media and local churches are great places to start.

- ◆ Resource: [Boosting Enrollment](#)

302.5 School Year Updates

Prior to the start of each school year (i.e., annually in August or September), the Program Director will need to submit the School Year Form in order to provide the Support Center with updates on their program, including forecasted attendance, class times and designations, transportation details and more.

- ◆ Resource: [School Year Form](#)

303 Policies

The key to a successful LifeWise schedule is to develop a positive relationship and work closely with public school administration. We must strive to be flexible and always remember we are servants seeking to meet a need in the school and community. We will find a way to work within the parameters of the public school's schedule and the restrictions of the law. Resources on scheduling are available on the Resource Hub and are also linked below.

- ◆ Resource: [Scheduling LifeWise Classes](#)

303.1 Policies and Procedures

Each LifeWise program will need to establish school-specific and local policies and procedures.

- ◆ Resource: [Establishing Procedures with the School](#)
- ◆ Resource: [Local Policies and Procedures Template](#)

Medical Action Plan

If a parent indicates in the physical permission form that their student has a medical condition or allergy, send the parent the [Medical Action Plan](#) to gather more details. If a program keeps medication (such as an

EpiPen or inhaler) on site, team members must be trained to administer it. *Note: The Medical Action Plan is not required for the student to attend LifeWise, but programs are required to send it to all parents who indicate their student has a condition or allergy.*

LifeWise personnel may also distribute a [Consent Form for Release of Information](#) to parents in order to collect pertinent medical or academic information about students from the school, such as medical plans, behavior plans or special education needs.

Incident Reports

[Incident Report forms](#) should be used to document the details of injuries, suspected abuse or illness occurring while at LifeWise or other events impacting safety and security. Here are the steps that should be followed when completing an incident report:

1. A volunteer and/or staff member completes the incident report form and provides it to the LifeWise classroom teacher.
2. The teacher reviews the report and notifies the Program Director of the incident.
3. Upon the Director's instruction, the teacher notifies one or more of the following people:
 - ◆ School nurse
 - ◆ School principal
 - ◆ School guidance counselor
 - ◆ Parent/guardian
4. The teacher provides a copy of the incident report form to the notified individual(s).
5. The Director keeps a copy of the incident report form on file (for at least 5 years after the involved student leaves the program).
6. The Director notifies the Program Coach and **HR anytime an allegation is made against a LifeWise staff member or volunteer or anytime there are potential legal implications** (i.e., legal concerns, an investigation is opened or a report is filed with CPS or other government agency)

303.2 Classroom Safety and Team Member Conduct

Adult to Student Ratio: The minimum recommended adult to student ratio in a LifeWise classroom is as follows:

- ◆ Grades K-5 = 1:10
- ◆ Grades 6-8 = 1:15
- ◆ Grades 9-12 = 1:20
- ◆ In addition to these guidelines, LifeWise requires that each classroom has at least two volunteers, in addition to the teacher, at all times. *Note: For middle and high school classes, only one volunteer is required (in addition to the teacher) as long as security cameras are in use and actively monitored.*

General Contact Guidelines: For any activity sponsored by LifeWise, at least three adults, all of whom have successfully completed Child Safety Training and a background check and who are not related to each other, must be present.* Whenever possible, at least one of the adult team members should be female. This rule applies to all LifeWise functions within the classroom and event space where youth are present. No other persons shall have contact with LifeWise students during LifeWise classes and/or events except with the prior approval of the Program Director. Moreover, the number of the adults is to be in proportion to the age and number of the participants, and the duration and difficulty of the activity. Prudence is required in applying this policy to different age groups, length of activity and the risk level of

the activity. **Note: For middle and high school classes, only one volunteer is required (in addition to the teacher) as long as security cameras are in use and actively monitored.*

One-on-One Contact: When a one-on-one conversation with a student is necessary (e.g., correction or counsel), visibility is required at all times. If the one-on-one conversation takes place in an office, classroom or other room, the door is to remain open. If it becomes necessary to close the door part way to reduce distraction, this may be done only if the office, classroom or other room has a window free from adornment. If the window has blinds, the blinds must remain open. *Note: These policies remain in place even if the program has a functional security camera system.*

Using the Restroom: Should a student require assistance in the bathroom, it is mandatory for two screened adults to be present. One adult should assist the student with the door open, while the other adult is responsible for visually monitoring the environment. In no instance should this task be delegated to another child, or any person other than an approved adult female team member. If a class has a student who may need assistance in the restroom, an additional screened volunteer should be scheduled.

When gendered bathrooms are assigned at a LifeWise facility, LifeWise team members and students attending LifeWise will use the bathroom that corresponds to the gender identified on their birth certificates. LifeWise team members, including all adult staff and volunteers, who do not adhere to this policy may receive disciplinary action. If a child does not adhere to this policy, the child's parents or legal guardians will be contacted and appropriate action will be taken, including suspension from the LifeWise program.

Physical Contact or Displays of Affection: LifeWise team members may only engage in appropriate physical contact and displays of affection with students in the LifeWise program (or otherwise) and are expressly prohibited from engaging in inappropriate physical contact and displays of affection. The following descriptions of appropriate and inappropriate physical contact between team members and students are specific but not exhaustive. It is our expectation that each program conducts LifeWise in a manner consistent with the spirit of these policies as well as with the literal interpretation of them.

Appropriate physical contact and displays of affection may be used to show support, encouragement and healthy affection toward students who are receptive to this form of emotional expression. However, adults are required to exercise good judgment and will never be allowed to force physical contact on any youth. Examples of appropriate physical contact and displays of affection could include:

- ◆ Hugs initiated by students
- ◆ Holding hands while walking with small children
- ◆ Hand-shakes
- ◆ High-fives, hand-slaps and fist-bumps
- ◆ Verbal praise
- ◆ Putting an arm on or around shoulders
- ◆ Pats on the shoulder or back

Inappropriate physical contact and displays of affection between adults and youth are prohibited at all times. Any inappropriate physical contact will not be allowed or tolerated. Examples of inappropriate physical contact and displays of affection include, but are not limited to:

- ◆ Any form of actual or perceived sexual contact
- ◆ Any form of kissing
- ◆ Initiating full-frontal hugs or bear-hugs by adult team members

- ◆ Massages or shoulder rubs
- ◆ Tickling or wrestling
- ◆ Hugging from behind
- ◆ Comments related to physique or body development
- ◆ Patting on the thigh, knee or leg
- ◆ Lengthy embraces
- ◆ Piggyback rides
- ◆ Any other physical contact that is unwelcome or unwanted by the student

Digital Communication and Social Media Interaction with Students: LifeWise team members shall not initiate social media connections with youth. Team members shall treat their interaction with youth on social networking sites, as well as any electronic communication, as though the interaction were occurring in public in front of other adults and youth. Additionally, team members should avoid one-on-one texting and private messaging with students. LifeWise team members shall refrain from electronic interactions that can be seen by a reasonably prudent person as inappropriate in frequency, tone or content.

First Aid and CPR Training: To ensure your LifeWise classroom is as safe as possible, we recommend Team Members complete CPR and/or First Aid training.

- ◆ Resource: [First Aid and CPR Training Recommendations](#)

Site Safety Inspection Checklist: This checklist should be completed by the Program Director or Location Leader prior to the first day of classes each school year to document facility safety measures. Be sure to address any areas of concern prior to the first day of class.

- ◆ Resource: [Site Safety Inspection Checklist](#)
- ◆ Resource: [Team Member Conduct](#)

[RETURN TO TOP OF SECTION](#)
[RETURN TO CONTENTS](#)

400 – LOOT

401 Finance

401.1 Financial Structure

LifeWise Academy is a division of LifeWise, Inc., a 501(c)3 nonprofit organization. The LifeWise, Inc. financial structure consists of a variety of funds. Each fund supports a specific person, group or LifeWise program within the LifeWise, Inc. organization. Each program's revenue and expenses are tracked within their specific fund.

401.2 Budgeting

Establishing the Initial Budget

An initial budget is helpful in determining fundraising goals. The following categories and guidelines are provided to aid in establishing the initial budget:

- ◆ **Paid Staff**
 - ◇ Director: Local programs are encouraged to hire a part-time paid Director upon entering Launch Step 7.
 - ◇ Teacher(s): It is highly recommended that local programs pay their teachers. The recommended amount is the equivalent of the local substitute teacher daily stipend, for the partnering school, approximated into an hourly wage.
- ◆ **Facility (If Applicable)**
 - ◇ Building: Purchasing, building, renting and all related utility, property insurance and maintenance costs may apply depending on whether the program is using a donated space.
 - ◇ Transportation: Vehicle acquisition, maintenance and operation
- ◆ **LifeWise Membership Fee**
 - ◇ A flat \$20/student/year fee offsets the cost of resources provided by the LifeWise Support Center, including but not limited to: curriculum, liability insurance, software, accounting, donation receipting, HR, coaching, training, etc.
- ◆ **Miscellaneous**
 - ◇ Classroom Supplies: Bibles, paper, pencils, crayons, craft supplies, teaching aids, etc.
 - ◇ Printing and Postage: Promotional materials, permission forms, donation envelopes, thank-you notes, stamps, etc.
 - ◇ Donation Processing Fees: All credit card donations and ACH transactions incur a 4% donation processing fee
- ◆ **Resource:** [Budget Development Guidelines](#)

Refining the Operating Budget

A more detailed budget is necessary as your program begins incurring actual costs. This operating budget should be evaluated annually. Use the data from your financial reports for ongoing budgeting.

- ◆ **Resource:** [Loot: Finance Training Course](#)

401.3 Expenses And Reporting

Using an Expense Card

Purchases on behalf of a LifeWise program are made using your expense card. Each Program Director is issued an expense card. Your program will need to identify an Expense Admin.

- ◆ All purchases made using your expense card must be recorded using the expense app or website. Required information includes fund name, expense category, purchase description, receipt image, class and location. Expense records must be completed by the 5th day of the month after the transaction occurred.
 - ◇ Under “Class,” choose “Programs.” Under “Location,” select “E01.” These fields will autofill after your first selection.
- ◆ The billing address associated with all expense cards is 5375 Grace St, Hilliard, OH 43026.
- ◆ All programs have access to an allotment of money that is available for use at any given time. The amount of money in the allotment is shown as the active budget, but that allotment is not a reflection of the amount of money in the program fund.
- ◆ All purchases made using your expense card will be reviewed by your program’s Expense Admin for approval. Reviewers check for proper fund and expense categorization, clear and accurate receipt images and timely expense report completion. A final review will be completed by Support Center staff prior to syncing transactions to our accounting system.
 - ◇ Be sure both the cardholder and Expense Admin double-check each field in each transaction
- ◆ Purchases made using your expense card are itemized on the monthly “Transaction by Detail” financial report.
- ◆ **Resource:** [Expense Admin Walkthrough](#)

Making Other Payments

Please use your expense card for program purchases whenever possible. In the event that a vendor does not accept credit cards, program staff may use the [Payment Request Form](#) to request payment.

You can use the Payment Request Form to request payment to specific vendors or to submit a request for a reimbursement. If you are not the Program Director, please check with your Director before submitting a payment request form.

Refer to the descriptions below to help you determine the appropriate type of request you should select when completing the form:

- ◆ **Employee or Contractor Payroll Payment**
 - ◇ Payments for 1099 contractors who ARE in HR Butler
 - For paying contractors who are NOT in HR Butler, use the “Invoice” type
 - ◇ Bonuses (holiday, etc.) for regular employees
 - Program Directors may submit these for employees at their program. If submitting on behalf of themselves, the Director must submit written approval from at least one Board member.
 - ◇ Compensation for hours an employee forgot to log in a previous pay period
 - This will be included in the employee’s next paycheck
- ◆ **Invoice Payment**
 - ◇ Use this if a vendor provides an invoice that needs to be paid. We will use the information provided on the invoice to mail the vendor a check.
 - ◇ If your vendor does not send an invoice, please create one with the following information: Payee name (check addressee), address and email; date; description of goods or services provided; payment amount due; due date.
- ◆ **Mileage Reimbursement**

- ❖ You may request reimbursement for mileage on your personal vehicle for travel that was **beyond your typical commute**. This could be for travel to a LifeWise event (like the annual LifeWise Summit).
- ❖ The form will ask for a travel log. Please keep a detailed list of LifeWise-related travel using our Travel Log Template. When requesting reimbursement, use the Share button to copy and paste the link into the "Link to Travel Log" field, and ensure the Share settings are set to "Anyone with the link can view."
 - **Resource:** [Travel Log Template](#)
- ◆ **Out of Pocket Reimbursement**
 - ❖ When paying for expenses using personal funds, programs must adhere to our Out of Pocket Reimbursement Policy, which states that out of pocket expenses may not exceed \$500 without prior authorization. Please do not use your expense card to transfer funds to other payment platforms like Venmo or Google Pay.
 - **Resource:** [Out of Pocket Reimbursement Policy](#)
- ◆ **501c3 Transfer Grant Request**
 - ❖ This request is only used for programs that have established their own 501c3 for the sole purpose of owning property. For more information about applying for 501c3 status, please see [this article](#).
- ◆ **Fund to Fund Transfer**
 - ❖ If you bought something from the Support Center or another LifeWise program, you can request to transfer funds from your program's fund to another fund.
 - ❖ Note: only the fund owner (usually, the Program Director) can request for funds to be transferred out. If another program owes you money, please ask their Director to submit the request.
- ◆ **Check Log**
 - ❖ This is for Support Center use only. Please do not select this payment type.
- ◆ **Wire Log**
 - ❖ This is for Support Center use only. Please do not select this payment type.

After submitting your payment request, an email will automatically be sent to your program's Expense Admin and Program Director. If this purchase was not authorized, the Expense Admin and/or Program Director should let us know.

LifeWise Fees

There are three types of LifeWise Fees:

- ◆ **Launch Fees:** Programs progressing through the Launch Process shall incur a \$500 LifeWise fee upon transition to Step 3, a \$1,000 staff training fee at Step 7 and a final \$1,500 startup fee upon Step 10 (Live). Launch fees (\$3,000 in total) aid in offsetting the cost for the LifeWise Support Center to develop and provide coaching and guidance throughout the process, along with modest transportation costs for local day travel. Necessary, reasonable and customary travel costs will also be charged to the program for any overnight, airfare and/or multi-day expenses.
 - ❖ The Live startup fee includes: Two registrations to the annual LifeWise Summit, A-frame "Classes Today" sign and one retractable banner
- ◆ **Annual Student Fee:** Each program is assessed a \$20/student/year fee. The annual student fee will be billed monthly (as an internal accounting transfer) during the school year based on forecasted attendance. Forecasted attendance will be submitted by the Program Director using the School Year Form. Annually in May, this record will be updated by the Program Director and a

final true-up will be calculated based on final actual attendance. Attendance is defined as each unique individual student to attend even once during the school year. Curriculum licensing and insurance coverage dictate that every unique individual student must be counted.

- ❖ A floor and ceiling on total annual charges is effective beginning July 2023:
 - \$1,000 Min (floor) / Year per Program (i.e., 50 student equivalent)
 - \$12,000 Max (ceiling) / Year per Program - up to 5 schools (i.e., 600 student equivalent)
 - \$1,000 increase to the max per additional school beyond the first 5 schools served
- ❖ Resource: [Support Center Services](#)
- ❖ Resource: [School Year Form](#)
- ◆ **Donation Processing Fees:** Programs pay a monthly 4% processing fee for the lump sum of donations they received for that month. This will be reflected in the monthly reports received by each program starting July 2023.
 - ❖ *Note: This fee replaces the previous 2.5% National NCF fee and the previous 2% donation processing fee*

Insurance

LifeWise, Inc. provides each qualifying LifeWise program with an umbrella policy through Brotherhood Mutual Insurance. Liability Insurance costs fall under the \$20/student/year administrative fee. The Support Center will pass Property and Personal Property Insurance costs directly to each program twice per year during established policy renewal periods or when changes are made to policy premiums. For additional details regarding coverage, refer to LifeWise Academy Policy Manual.

Financial Reports

Financial reports are sent to program email inboxes on the 23rd of every month and reflect balances and transactions up through the end of the preceding month. There are four tabs at the bottom of the report. The standard reports are:

- ◆ **Fund Balance Report:** contains data since the creation of the fund and provides a bottom line fund balance.
- ◆ **Statement of Activity Fiscal Year To Date:** contains an overview of income and expenses on a monthly basis for the current fiscal year. The LifeWise, Inc. Fiscal Year begins on July 1st.
- ◆ **Transaction Detail Fiscal Year To Date:** provides a detailed report of every transaction for the current fiscal year.
- ◆ Resource: [Income and Expense Categories](#)

Long-Term Investment

Programs may choose to open a long-term investment account with the National Christian Foundation (NCF). Once the fund reaches \$25,000, programs will be able to access up to 4% of those funds per year. Submit a ticket to let the Support Center know of your interest in opening an investment account.

401.4 Non-Donation Revenue

There may be some scenarios in which revenue comes in from a non-donation source, such as from special events or sales. In these cases, submit a Non-Donation Revenue Form and provide the type of revenue.

- ◆ Resource: [Non-Donation Revenue Form](#)

402 Trustraising

402.1 Guiding Principles

Fundraising is biblical; there are many biblical examples of God’s people asking for what was needed, donating resources to support His work and sharing with each other. It’s also meaningful. Deep connections and relationships are formed when we link arms with each other financially and then watch God work through those donated funds.

- ◆ Resource: [Trustraising Manual](#)

The LifeWise Pledge

The LifeWise Pledge covers the foundational concepts upon which LifeWise is built. Sharing it can be a useful tool in the fundraising process, particularly when conducting church presentations.



When speaking to some audiences, it may be helpful to simplify the LifeWise Pledge to the “Secret Sauce” below:



402.2 Kickoff Campaign

The Kickoff Campaign format is simple and effective. Many communities can raise their entire first year’s budget during this 12-week campaign. For a complete description of the Kickoff Campaign process and available resources, see the Trustraising Manual. A broad overview of the campaign process is below:

- ◆ **Form a Committee and Namestorm:** Gather a committed group of people (at least 10) who are willing to make a meaningful donation and contribute a list of 3–6 names of others who may also have a willingness to give. The Community Interest List also serves as a resource for developing a list of potential donors.
- ◆ **Training and Making Calls:** Committee members meet regularly to receive training and encouragement on contacting potential donors. All potential donors are contacted within a 12-week period.

- ◆ Resource: [TruStraising Manual](#)

402.3 LifeWise 101

A LifeWise 101 is a “point of entry” event designed to give community members an overview of the local operations, impact and opportunity for the national expansion of LifeWise through an informational session and tour. The bigger vision for a 101 is to give community members a chance to experience a live program. A 101 can play a major role in sparking and nurturing relationships with potential donors and volunteers. It is recommended that you start holding LifeWise 101 events at your location as soon as possible after going live. Detailed information about conducting 101 events can be found in the Fundraising Manual.

- ◆ Resource: [TruStraising Manual](#)
- ◆ Resource: [Ambassador Half Sheet](#)
- ◆ Resource: [Local Budget Template](#)
- ◆ Resource: [Home Team Giving Levels Template](#)
- ◆ Resource: [LifeWise 101 Contact Card](#)
- ◆ Resource: [LifeWise 101 Invite Template](#)
- ◆ Resource: [LifeWise 101 Overview Packet](#)
- ◆ Resource: [LifeWise 101 Registration Jotform](#)
 - ◇ [Make a clone](#) of the Jotform
 - ◇ Edit the information (program name in the header, venue, address, time)
 - ◇ In Settings, update your program name in the title and change the email in "Notification 1" to your program's group inbox
- ◆ Resource: [LifeWise Basic Slides Template](#)

402.4 Church Presentations

If possible, schedule Sunday morning presentations where you can present the LifeWise vision, show the video, give an update on your program, get more signatures for your Community Interest List and ask for donations (especially smaller recurring monthly amounts). This is not the best method for getting large donations, but if done well, these presentations can be very effective.

- ◆ Resource: [Basic Slides Template](#)
- ◆ Resource: [TruStraising Manual](#)

402.5 Annual Fundraising Event

The natural impulse is to focus on fundraising events from day 1. Resist this impulse. Real fundraising is done one on one through strategies like the Kickoff Campaign. A good fundraising event can be the cherry on top of a robust fundraising strategy. It should not be the main focus.

- ◆ Resource: [TruStraising Manual](#)

402.6 School Approval Matching Grant

A \$1,500 matching grant is available to all programs within the first 30 days after school approval. There is nothing programs need to do to receive this grant—any program that raises at least \$1,500 during the first 30 days after approval will automatically receive the \$1,500 match in their program fund.

402.7 Donation Management

LifeWise Academy uses the Salesforce platform for donation management. All programs are required to log donations in Salesforce when they are received. The Support Center provides email receipts and paper year-end giving statements to all donors. For more detailed information about using Salesforce, see Section 601.1 of this handbook.

402.8 Cash Handling

In light of the fact that a perceived lack of accountability and personal temptation are inherent in the exchange of cash, cash handling is strongly discouraged. However, if all efforts have been made to avoid receiving cash and cash is still received, please use the [Cash Handling Form](#) to document and create accountability for the handling of cash. A manual receipt can also be found on the Resource Hub.

[RETURN TO TOP OF SECTION](#)

[RETURN TO CONTENTS](#)

500 – LANGUAGE

501 Prayer Team

It is crucial to pray regularly for a LifeWise program. The most effective way to do this is to appoint a Board member to lead a local Prayer Team. This member will organize and encourage prayer for the Board, Director, teachers, volunteers, students and school. Additionally, the Prayer Team leader should open Board meetings, 101s and other LifeWise events with prayer whenever possible.

501.1 Establishing and Maintaining Prayer Support

Whoever is appointed as the Prayer Team leader can organize their team of prayer warriors however they find most effective. Regular in-person meetings, emails, texts or a combination of all three can be used. The key is for someone local to communicate regularly with the Board, Director and teachers to be aware of the program's needs, especially the needs of the students, and communicate those needs to a group committed to regular prayer. When sharing prayer requests about students, avoid using names and instead focus on grade level and, if relevant, gender.

- ◆ **Resource:** [Prayer Team Meeting Agenda](#)

502 Communications

502.1 Brand Ambassadorship

The LifeWise Brand is our face to the watching world, so every program must be committed to maintaining brand integrity. Much like other large organizations that share one identity across many locations, we want to demonstrate a high level of unity and consistency from one local LifeWise program to another. Every time the LifeWise Academy logo or name is used, it represents our brand. Having everyone aligned under carefully established guidelines not only makes our organization more recognizable but also demonstrates the level of excellence to which we aspire. This consistency and excellence plays a large role in earning the trust of educators, parents, volunteers, donors and the public.

Maintaining Brand Consistency

LifeWise Academy provides detailed guidance on brand use in the [Brand Guidelines](#) document available on the Resource Hub. There are four primary areas in which each program must maintain brand consistency:

- ◆ **Logos:** LifeWise Academy logos are available for download from the Brand Guidelines and are not to be altered in any way, nor should any new logo be created using the LifeWise Academy name. Logos must be used for all branded marketing and communications.
 - ◇ Please note that our logo is trademarked. Any direct or inferred use of our name and/or logo without our approval is a violation. **A \$1,000 trademark fee will be charged to programs that violate this process.**
 - ◇ NOTE: Approval for any new pieces of marketing collateral (e.g. flyers, brochures, signs) must be obtained from the LifeWise Support Center before use. See section 502.3 for more information about obtaining approval for new designs.
- ◆ **Typography:** Brand fonts selected by the LifeWise Support Center are to be used for all marketing and communication. These fonts are available for download on the Resource Hub.
- ◆ **Colors:** LifeWise has carefully selected Brand colors for use on LifeWise facilities, vehicles and communications. Color guidelines can be found at lifewise.org/styleguide.
- ◆ **Standard Email Signature:** Everyone in a leadership role and/or communicating through the provided organizational email address should set up a branded LifeWise Academy email signature.

Detailed instructions on setting up the approved email signature can be found on the Resource Hub.

The Design Process

Extensive marketing collateral is provided by the Support Center as ready-to-use products available for purchase at the [LifeWise Storefront](http://lifewise.collaterate.com) [lifewise.collaterate.com] or for download from the Resource Hub. When custom materials are needed, programs must follow the process of submitting a design request ticket through the [Resource Hub](http://support.lifewise.org) [support.lifewise.org].

There are two types of tickets for local design requests:

- ◆ **Approval for a locally designed item:** Program personnel design an item and submit the file to the Support Center for approval.
- ◆ **Request for Support Center design:** Program personnel submit specifications for the desired item to the Support Center and Support Center staff generate the design.

The LifeWise Academy name and logo are registered trademarks with the United States Patent and Trademark Office. Use of the LifeWise Academy name and logo require expressed written permission. This includes, but is not limited to, local programs. Therefore, anyone operating outside of our design process is in violation of permitted trademark use.

Consistency in apparel is one way in which we can demonstrate unity across all programs. The LifeWise Academy [Apparel Store](#) provides high-quality apparel options that are in keeping with brand guidelines. Programs can also hold an apparel fundraiser once per year through the Apparel Store.

- ◆ **Resource:** [Apparel and Gear Policy](#)

Local programs do have an option to produce apparel locally within the parameters of the Preferred Vendor Policy. Vendors need to sign an agreement with the LifeWise Support Center and send proofs (in a high-quality photograph) of each item they intend to produce before they will be able to sell LifeWise apparel. Please note that our signature red t-shirts can be purchased for \$5 through our Apparel Store and will not be available for Preferred Vendors to produce.

- ◆ **Resource:** [Preferred Vendor Policy](#)

502.2 Social Media, Webpage and Email

Every LifeWise program should take full advantage of technology to inform and raise awareness in their communities. Regarding social media, LifeWise's minimum requirement is for each program to create and maintain a Facebook page.

Social Media Pages

Social media is a great resource for keeping people in the loop about your LifeWise program. Refer to the [Social Media Process and Guidelines](#) document for tips on managing social media.

The [Social Media Inventory](#) contains post suggestions for pre-launch content. Simply copy and paste the text and media link into a post on the specific social media account. Feel free to change the image, video or caption to customize for specific program details—or use the posts as inspiration. Reference the [Social Media Template Library](#) for more customizable social media posts.

Before posting images and videos with students, make sure to have parent/guardian permission. Never post class locations or times, student names or any other identifying information, even if the guardians give permission.

- ◆ Resource: [Social Media Process and Guidelines](#)
- ◆ Resource: [Social Media Inventory](#)

Note: LifeWise suggests that you refrain from adding your program as a business on Google because of the potential for negative comments to be connected with your program. If you're looking to spread the word about your LifeWise program, we recommend you do so through church presentations, social media, community events, etc.

LifeWise Program Webpage

Each program has a unique webpage which is created by the Support Center. The Program Director can submit content information via a Support Ticket to make updates to the web page. At a minimum, Directors should submit the following information for use on the web page after the program is live:

- ◆ Program details description (3-5 sentences or bullets)
- ◆ Teacher names
- ◆ Two pictures, preferably one interior and one exterior

LifeWise Email Accounts

Each LifeWise program is issued a group email account. All Leadership Board members should have access to the group email account for the purposes of viewing financial reports and for using the email address and password to access the Resource Hub. Program Directors and regular (not substitute) teachers are also provided with lifewise.org email accounts as part of the hiring process. All email account owners should create an email signature consistent with our [Brand Guidelines](#).

Disclaimer: Public school officials, such as school board members and superintendents, are subject to information laws which can require they release records pertaining to their interaction with LifeWise personnel. Therefore, anyone affiliated with LifeWise should be mindful of their written communication (including emails and text messages) with school officials. Team members should only write correspondence they would be comfortable entering into public record.

502.3 Newsletters and the Media

Effective communication is a crucial component of a thriving program. Well-written communication builds trust and enhances credibility with a variety of audiences.

Find recommended [Language Strategies](#) that will help your program connect with parents, donors and the public through newsletters, social media and text messages. Use this [Language Calendar](#) to help schedule newsletter and social media leading up to launch and then for monthly newsletter and social media scheduling after launch.

Newsletters

The LifeWise Support Center recommends sending regular newsletters to parents and donors. A minimum of one newsletter per quarter should be sent.

- ◆ **Mailchimp:** The Support Center recommends that LifeWise programs employ the use of the Mailchimp platform for sending online newsletters. The following resources are available on the Resource Hub for guidance in creating and using a Mailchimp account: Online Newsletter Process & Guidelines, Online Newsletter Training Course, Online Newsletter Training Videos and Online Newsletter Template. New programs are asked to send test copies of their first Mailchimp newsletter to the Support Center for review prior to sending them publicly.
- ◆ Resource: [Online Newsletter Process and Guidelines](#)

- ◆ Resource: [Online Newsletter Training Course](#)
- ◆ Resource: [Online Newsletter Training Videos](#)
- ◆ Resource: [Online Newsletter Template](#)

Public Relations

Working with local media outlets can be a very effective way to spread the word about LifeWise in your community. Program Directors are asked to coordinate all media contact through the LifeWise public relations staff. For media requests, Directors should forward the media contact information to press@lifewise.org and include the name and phone number of the initial local contact. The Support Center public relations staff will then review the request, gather details, help set up the interview and help with local interview preparation.

- ◆ Resource: [Media Guidelines](#)

503 Community Outreach

503.1 Church Updates

Because LifeWise is a local church driven ministry, fostering and maintaining church support is crucial. Church partnerships provide opportunities for financial support, prayer support and a network of individuals who may be willing to serve as LifeWise staff members or volunteers. Updating local churches during worship services is the ideal way to foster support and meet these needs. These presentations can be done by the Program Director, Board members, teachers or volunteers.

Church Partnership Packet

Since LifeWise is local church driven, establishing partnerships with local churches is crucial to the success of a LifeWise program—it's at the heart of what we do. It's vital that any church partnered with a LifeWise program agrees with our Statement of Faith, Vision Statement and Philosophy and Team Member Conduct. Create a Church Partnerships Cover Letter using the below template and send it as a support ticket for approval. When you send it to church leaders, include the five other resources linked.

- ◆ Resource: [Church Partnership Cover Letter](#)
- ◆ Resource: [Teach the Bible During School Hours](#)
- ◆ Resource: [How Churches Can Get Involved](#)
- ◆ Resource: [Statement of Faith](#)
- ◆ Resource: [Vision Statement and Philosophy](#)
- ◆ Resource: [Team Member Conduct](#)

In addition to these resources, [How Churches Can Partner](#) can be sent to church leaders specifically during Steps 7-10 of the Launch Process (and after your program is Live).

503.2 Community Events

Community events provide excellent opportunities to inform the local population about the mission and operations of a LifeWise program. Having a LifeWise presence during these events is a great way to enroll students, inform parents and raise awareness of the local program.

- ◆ Resource: [Community Outreach Strategies](#)

When setting up a booth for community events, prepare the following materials:

- ◆ Set up your table with a [tablecloth](#) and the [LifeWise Retractable Banner](#)
- ◆ Bring copies of the Character Ed and Parent [Bible Education Brochures](#)
- ◆ You may also consider bringing copies of the [Program Overview](#)

[RETURN TO TOP OF SECTION](#)
[RETURN TO CONTENTS](#)

600 – OPERATIONS

601 Systems

601.1 Salesforce

Salesforce is a customer relationship management platform which the LifeWise Support Center uses for contact, donation and program management. Local LifeWise programs are asked to maintain contact, donation and program data within the platform.

- ◆ Resource: [Step 8 Training: Salesforce](#)

601.2 HR Butler

The LifeWise Support Center employs the services of HR Butler, a Central Ohio based human resources services provider. HR Butler provides payroll and benefits administration to LifeWise Academy Staff members. All employees are required to complete an onboarding process using the HR Butler online platform, iSolved.

- ◆ Hourly employees must log their hours worked via the iSolved timesheet.
 - ◇ Resource: [HR Butler Overview](#)
 - ◇ Resource: [Timekeeping](#)
 - ◇ Resource: [Timekeeping \(Smartphone\)](#)
 - ◇ Resource: [LifeWise Pay Structure FAQs](#)
- ◆ Timesheets run from the 22nd of the month through the 7th of the following month and from the 8th to the 21st
- ◆ Pay is provided via direct deposit on the 15th of each month and the last day of the month
- ◆ Program Directors can be provided with manager access in HR Butler. Manager access provides access to all employee timesheets.
 - ◇ Resource: [Approving Employee Hours in HR Butler](#)
 - ◇ Resource: [HR Butler FAQs](#)
 - ◇ Resource: [HR Butler Reporting](#)

601.3 Protect My Ministry

Each program will need to designate one person, typically the Program Director or another Leadership Board member, to act as a Protect My Ministry (PMM) Administrator for the local program. The PMM Administrator is responsible for ordering background checks and child safety training for all local program Board members, staff and volunteers.

All background checks must be cleared prior to the team member's first day. Notify hr@lifewise.org of any alerts.

- ◆ Resource: [Protect My Ministry User Admin Guide](#)

602 Support

602.1 Resource Hub and Ticketing System

The [Resource Hub and Ticketing System](#) [support.lifewise.org] are the front line in providing support to local programs. They are available to all employees and volunteers who have been issued a lifewise.org email account. Most resources are only available after signing in. Individuals should use the "Sign In Using G" option to sign in and access all of the articles and the ticketing system.

- ◆ **Resource Hub:** This is a searchable database of articles, frequently asked questions and informative videos.

- ◆ **Ticketing System:** The ticketing system provides a vehicle for submitting questions and requests for help. LifeWise personnel have the option of submitting requests for general help, design requests or consult requests.

602.2 Program Coaching

As LifeWise Programs grow in overall health, they achieve higher levels of independence and self-sustainability. There is ongoing support for mature programs as every LifeWise program is assigned a Program Coach. Program Directors are required to meet with their Coach via phone call or virtual meeting at least monthly for the purpose of exchanging updates and providing support. Coaches also visit programs at least once per year for a classroom observation.

- ◆ **Resource:** [Step 11: Long-Term Program Support](#)

[RETURN TO TOP OF SECTION](#)

[RETURN TO CONTENTS](#)