

# Service, Welfare and Rehabilitation Grant Guidelines

## FY2014-15

*"To care for him who shall have borne the burden of battle and for his widow and his orphan"*

*- Abraham Lincoln*

MOPH Service  
Foundation,  
Inc.  
P.O. Box 49  
Annandale,  
VA 22003

## **Service, Welfare and Rehabilitation Grants**

### **History**

In March 1988 the MOPH Service Foundation distributed service, welfare and rehabilitation grants to MOPH Departments in accordance with a resolution passed at the 1987 MOPH Service Foundation Annual Board of Directors Meeting to “provide funds for VAVS (Service – Welfare – Rehabilitation). Grants were issued to those Departments where Foundation had a fundraising campaign but were not grandfathered states.

These funds were not to be used to establish a cash welfare fund, for example; to set up a cash disbursing account at the NSO office for veterans who may come in asking for cash assistance. Such an account could create a never ending source of requests and when no longer available could create some ill feelings amongst the veterans, thereby defeating your good intentions. The funds are also not to be used for monuments or memorials. The entire grant was to be used for the purpose of service, welfare and rehabilitation programs

As you are aware the Service Foundation must conduct its fund raising and expenditures (grants) in strict accordance with the respective federal, state or local laws, regulations or rules.

The Service Foundation's primary mission is to raise funds for the Military Order of the Purple Heart National Service Officers Program, welfare and rehabilitation programs. MOPH Department Service, welfare and rehabilitation activities are part of this mission.

The Military Order of the Purple Heart Service Foundation, Inc. for quite some time reviewed various programs to financially assist the Military Order of the Purple Heart of the U.S.A. Departments.

By ballot vote in July 1998 the MOPHSF Executive Committee agreed to extend the grant to all MOPH Departments excluding Grandfathered Departments.

In March of 1999 a letter from the Executive Director accompanied each check clarifying the purpose of the grant, an official reporting form and reporting procedures.

It is through the SWR grant that the Service Foundation can assist the MOPH Departments. The grant to each Department was based upon the respective Department's membership strength.

To assist the Department in carrying out this program, an amount of money not to exceed fifteen-percent (15%) of the total grant was authorized for general/administrative expenses.

The expenditure for the remaining eighty-five percent (85%) was to be receipted back to the Foundation along with the grant reporting form and the original receipts. Those distributing the funds were alerted to not just making a donation to the general fund.

It was suggested that consideration by the respective Department to share the grant with its Chapters would bring everyone into the fold to assist our less-fortunate patriots/veterans. The

grant letter stated it is the responsibility of the Department to monitor the Chapters, collect the Chapter's receipts and report back to the Foundation. The Department accepts this responsibility when accepting the Foundation funds.

Departments were informed that no further grants under this category would be made until receipts identifying the expenditure of this special grant are received by the Foundation.

Despite all efforts by the Foundation to receive the reports with original receipts some Departments were unable to comply because of lost or misplaced receipts, members moving or passing away, etc.

Amnesty for missing receipts was granted to all MOPH Departments on July 1, 2001 for all receipts of expenditures utilizing grants issued prior to June 30, 2001. The MOPH Departments were permitted to complete a form with an explanation of the missing receipts, description of what the funds were used for and had to be signed by an Officer of the Department.

An additional review was performed for the period of July 2001 through May 2010 and again the Foundation had difficulty obtaining receipts and documentation. As of June 2010 all membership-based grants in excess of \$5,000.00 are issued in installments. Once the documentation is received and verified by the Foundation office for the first installment, the second installment of the grant will be issued. No future grants will be issued until full accountability is received for previous grants. The following is a guideline for Departments and Chapters regarding expending and reporting service, welfare and rehabilitation funds.

**These enhanced reporting requirements are necessary to satisfy IRS and State government regulations as well as charity watch dog groups, and to be more transparent to the donating public and outside organizations.**

*The Foundation appreciates and commends your service to our less-fortunate veterans and trusts MOPH Departments understand the necessity for complete accountability for the use of these funds.*

### **Membership Based Grants**

Service, Welfare and Rehabilitation grants are disbursed on a membership number basis. The number of members directly affects the amount of funds granted to a particular MOPH Department. **Foundation SWR grants are expected to be expended within the fiscal year received and are not to be placed in long term savings accounts, a Certificate of Deposit or other long term financial/investment accounts.**

The Department SWR grant may be allocated by the Department to its Chapters for programs of veterans' service, welfare and rehabilitation, however, **the Department is responsible for the accounting of the funds.**

The purpose of these grants shall be to provide for service, welfare and rehabilitation of the wounded, disabled and handicapped veteran, his/her surviving spouse, orphans and fellow veterans. The program has a multi-beneficial purpose, first, to assist living veterans and those

veterans in the hospital, DVA or State Veterans' nursing or domiciliary facilities or other types of facilities accredited for veteran care by the VA; secondly, to provide an incentive for MOPH Departments to increase their membership, and to increase awareness of the Purple Heart.

Departments are allocated 15% of the grant amount for administrative purposes. **No less than 85% of the grant is to be used for programs of service, welfare and rehabilitation.** The Department must submit receipts, and where necessary, acknowledgement letters for the grant equaling the 85% allotment.

Department of Veterans Affairs medical centers and domiciliaries normally have VAVS office personnel who can provide a "wish list" of items needed for the facility to improve the quality of life for our veterans and may also have a listing of individual needs. Please contact your local facility to discuss how best to use the funds. State veterans nursing homes social workers may also provide this information. The Department may contact private nursing homes social services offices to inquire as to the number of veterans in their homes and what the veteran needs (if any) may be. **Remember, when providing goods to a private nursing home, the facility will need to provide a letter on their stationery, signed by the person in charge of social programs indicating veterans are housed and cared for in their facility and will benefit from all Purple Heart donations.** When a donation is made to the general fund of the facility, a statement regarding specific items that directly benefited veterans; for example, clothing, toiletries, etc. is required. **Items ward personnel ask for on a routine basis:**

Wheelchairs	Laundry Detergent	Electric shavers
Sweatshirts	Plastic Grocery Bags (Unused)	Picnic items for socials
Tee Shirts/Socks	Fingernail Clippers	Ice Cream Socials/Bingo
Canteen Books	Soap/Hand Lotion	Telephone cards
Underwear/various sizes	White socks	Stamped Envelopes/Stamps
Undershirts/various sizes	Combs/Toothbrushes	Shower Caps
After shave/lotion	Shaving Cream	Fleece vest/jackets/hats
Denture Cleaners/Adhesive	Dental Floss/Pill Cutters	Television/Radios

Other items often requested: MP3 Players, video games, headsets, television wall mounts, picnic area furniture, etc.

## Food Basket Donations

When providing purchased foods, etc. for holiday food baskets, an acknowledgement from the organization sponsoring the event must be provided and contain the following:

The name of the organization sponsoring the event, the date, the monetary value of the donation, and who will benefit from this donation. Contact information to include a name and phone number for the sponsoring organization representative accepting responsibility and accountability for the donation. This acknowledgement should be attached to the receipts for the purchased items.

Departments **are strongly recommended to provide these funds in the name of the Purple Heart and not to pool the funds with another group for a particular cause.** The purpose of this grant is to serve veterans, Purple Heart visibility and to give our members the funds needed to be involved in these worthwhile activities for our Nation's veterans at these facilities.

## **Fishing Trips and Sporting Events**

Receipts for funds spent on veterans' rehabilitative fishing/hunting trips and sporting events must include how many veterans were served by the events and how the veterans were identified to participate in the event. Funds cannot be spent to sponsor a Chapter or Department fishing/hunting event. Transportation costs, ticket costs, etc. for sporting events must be attached to the acknowledgement from the group benefitting from the event. It is understood that a few members of the Chapter or Department may be involved as chaperones and they should be identified. If funds are given to an organization that provides these retreats, a formal acknowledgement with the monetary value, date of the event, contact information for the individual representing the sponsoring organization and a statement regarding who benefitted.

## **Reports and Receipts**

### **MOPH Service Foundation SWR Grants**

#### **PLEASE USE THE REPORTING FORM**

1. Reporting Forms are to be completed by the **Department only**.
  - a. Chapters are not to complete the Foundation form and mail to Foundation.
  - b. This will eliminate duplication and photocopies of receipts which are not acceptable.
2. The SWR Reporting Form **must be signed by the Finance Officer, Commander or Adjutant of the Department**. If additional space is needed, attach an additional page.
3. All ORIGINAL Receipts must be attached to the form.
4. All receipts should be identified to coordinate with the lines on the reporting form.
5. The total of the receipts must equal the total of the form or amount being reported. If a discrepancy exists such as a personal purchase on the same receipt, please indicate on the receipt and tally the actual SWR purchase costs.
6. **Receipts must be legible**. Please do not highlight amounts – it reduces legibility.
7. Every report should have a receipt/receipts attached. Field receipts should be attached to thank-you notes for the same event so they are not counted or listed multiple times.
8. Reports and receipts are to be submitted in a timely manner.
9. Receipts cannot pre-date the date of the grant check.
10. Receipts for goods for picnics and events at VA facilities must be attached to an **acknowledgement from the facility indicating the event** and these goods were received for the event. The acknowledgment will need to **be signed and dated** by the Director or person in charge of the event for the facility along with contact information.

**Generic receipts such as receipt books purchased from an office supply store are not acceptable. Acknowledgements should be on letterhead. If handwritten, the individual's name should be legible or printed beneath. A date and monetary amount will need to be included. There is a facility receipt provided in the packets for those organizations/facilities that do not have receipts or letterhead.**

## **Valid Receipts**

**All VA Medical Centers and Vet Centers are government agencies. Government agencies will issue receipts for funds or goods received through charitable donations and keep records of these donations for accounting purposes. If you have not received an acknowledgment, do not let too much time pass. Contact the agency and let them know your future grants depend on receipts and acknowledgements.**

1. Letters of appreciation from the VA facility or nursing homes acknowledging the gift and its value or the dollar amount received and what it will be used for.
2. Original VAMC field receipts which indicate from whom the donation came, the value and how the funds will be used.
3. Store receipts for items i.e. clothing, food, paper goods, along with a letter or field receipt from the facility indicating these items were received by the facility with a description of items and the date the items were received should also be noted. The description of goods will match what is shown as purchased on the receipt. The acknowledgement must be signed by a representative of the facility acknowledging the items were used for a specific event.
4. Thank you notes from homeless shelters, private or state run nursing homes should indicate that veterans will benefit from the donation. The amount or value of the donation and the date must also be noted along with facility contact information.
5. If food cards are purchased and given to Vet Centers or other facilities to be handed out at their discretion, the facility's **Director** must sign and date a statement that the cards were received, the value confirmed and assure veterans will receive the cards. A case worker or vet center counselor does not qualify to sign for the receipt of the donation. It must be the **individual in charge of the Vet Center** who assumes the responsibility for the total donation and guarantees its proper use.
6. Copies of certificates of appreciation, pictures of veterans receiving the items, etc. will add to the report and credibility of proper use of funds for audit purposes.

## **Invalid Receipts**

1. Copies of Department checks issued to Chapters for VAVS activities.
2. Department or Chapter Warrants are not receipts.
3. A note regarding what the Department "intends" to do with the funds.
4. A note indicating that a member purchased an item but has no receipt.

5. Photocopied store receipts. These are quite often missing the total listing of items purchased, poorly copied, or just cut off.
6. A note stating that a needy veteran was given funds (welfare) with no backup.
7. Member's credit card statements with personal notes indicating a bill was paid for a veteran without a copy of the veteran's bill (in his/her name) matching the amount and an acknowledgment from the veteran. Without backup documentation, a credit card statement indicates something was paid for with no additional information. The charge on the credit card statement will match the veteran's bill.
8. If a check is accepted by a facility, (VAMC, Vet Centers, Stand-Downs, Nursing Homes, Homeless Shelters, etc.) the facility must give a receipt or letter of acknowledgement with the pertinent details. **A copy of the check is not an acknowledgement of receipt.**

## **What is not Service, Welfare and Rehabilitation?**

The 85% grant funds allocated for service, welfare and rehabilitation programs cannot be used for the following:

**Examples:**

**Department/Chapter members' luncheons, meetings, postage, mileage, storage rental fees, PO Box rental fees, member clothing (hats), funeral flowers, funeral expenses, awards to members, memorials, monuments, funeral wreaths, memorial wreaths, parade participation costs/fees, holiday party expenses for members, flowers or gift cards for hospitalized members, fuel expenses to distribute funds/gifts. SWR funds cannot be used to support Department/Chapter dinner events or advertising/printing for those functions, convention expenses or to purchase MOPH membership dues. These items are considered to be administrative and are the responsibility of the Department or Chapter.**

**The 85% portion of the Service, Welfare and Rehabilitation grant cannot be used for VAVS scholarships, student essay awards, any other scholarship programs, scholarship foundations or ROTC awards, no educational materials such as books, computer software, computers, etc.**

**SWR grant funds are not to be given to purchase land. Funds are not to be given to State or local governments for non-veteran specific programs such as police departments, etc.**

**Please contact the Foundation when in doubt about eligible programs.**

**Service, Welfare and Rehabilitation grant funds are to be used for all veterans regardless of whether they have been awarded the Purple Heart Medal. These**

**funds are not to be used as a method to recruit members through gift cards or special recruiting events.**

### **Administrative Allowance – 15%**

While the Department may allow their Chapters to receive 15% in administrative funds, **the total amount of all Chapters and the Department administrative funds must not exceed 15%** of the total amount allowed for the membership-based grant as it is listed by the Foundation in the correspondence accompanying the check and again on the report form. When in doubt, please contact our office.

Gas/fuel charges to purchase and delivered items or shop for items to donate are to be paid from the 15% administrative fee allowed not from the 85% SWR funds.

### **Stand Down Donations**

When making a donation to a Stand Down event, Department and Chapters are **required to get a receipt or acknowledgement from the entity sponsoring the event which should include contact information.** Federal, State or County Department of Veterans' Affairs are able to acknowledge the donation and the monetary value. Also, please provide any backup information regarding the event such as a flyer; e-mail notification of the event, etc. which should indicate the **date of the event and where it was held.**

### **Needy Veteran Welfare Receipt**

- Verification of veteran status. Name of veteran, branch of service, years in service. Please indicate whether the veteran has a Purple Heart for information purposes only. Non Purple Heart recipients are not to be excluded. The Purple Heart serves all veterans.
- A Veteran Need Form for funds expended for needy veterans must accompany the grant report form. The needy veteran report should indicate what the funds are needed for i.e. rent, food, etc. **Again, no cash/check should be given directly to a veteran.**
- If a travel ticket is needed, have the Department, Chapter or a member purchase the ticket for the veteran. Attach the receipt along to the signed veteran acknowledgement.

- If gift cards for food or other items are given to a veteran, the needy veteran form along with the receipt for the purchase of the gift card is needed. Be sure to complete the section to describe what the funds are needed for and circumstances. A true need must exist and be verified because gift cards are the same as cash.
- If the veteran needs the funds for utilities or rent, **pay the creditor directly** in the veteran's name and get a receipt or a copy of the check made out to the utility with memo line completed and verification the check was negotiated. Attach a **copy of the bill** issued to the veteran showing his/her name which will match the check amount.
- The veteran must sign the certification form indicating his/her name and all contact information available with an acknowledgement of the amount of funds he/she has received. This is in accordance with established Foundation hardship grant awards. **No funds may be expended on a veteran unwilling to acknowledge receipt of the assistance.**
- Personal credit card statements with charges by members to pay a bill for a veteran must be accompanied by a copy of the bill in the veteran's name that was paid and a statement from the veteran. Personal notes written on credit card statements are unacceptable. The payment on the statement will need to match the amount of the veteran's bill.
- No drugs, cigarettes or alcohol may be purchased with SWR funds. A MOPH member should accompany the veteran to purchase food items and obtain the store receipt.
- When giving gift cards to Vet Centers have the Vet Center complete the facility form and print the name and title of the individual who accepts responsibility for the gift cards and the intended purpose. If the center has letterhead, they can type a statement indicating the type of gift, the monetary value and the date. A telephone number should be provided for the Vet Center.

To avoid possible documentation deficiencies, please contact the Foundation office for further assistance and guidance when considering a needy veteran grant.

All Departments shall fully account for all expenditures of previously granted funds before any further grants are given.

Remember to make a copy of your report before mailing. Also, do not hesitate to call the Foundation office if you have questions regarding the grant or reporting forms. The Foundation Headquarters main telephone number is (703) 256-6139.

Mail your completed reporting form along with supporting documentation to the Service Foundation office:

**MOPH Service Foundation**

**Attention: Grants**

**P.O. Box 49**

**Annandale, VA 22003**

# Veteran Need Verification Form

Military Order of the Purple Heart

Service Foundation, Inc.  
P.O. Box 49  
Annandale, VA 22003  
703-256-6139

MOPH Department _____
Veteran information and need verified by the following <u>Department/Chapter Officer:</u>
(Sign) _____
(Print Name) _____
(Telephone) _____

**Veteran Information - (Veteran being assisted – information must be completed to receive assistance) NO CASH IS TO BE GIVEN DIRECTLY TO THE VETERAN.**

\_\_\_\_\_ (Name) Purple Heart Recipient: Y N  
\_\_\_\_\_ (Address)  
\_\_\_\_\_ (City, State, Zip)  
(Telephone) \_\_\_\_\_

Funds are need for what purpose?

\_\_\_\_\_  
\_\_\_\_\_

Funds paid in Veteran's name to another party:

\_\_\_\_\_ (Name/Company)  
\_\_\_\_\_ (Contact Person)  
\_\_\_\_\_ (Address)  
\_\_\_\_\_ (City, State, Zip)  
Telephone ( ) \_\_\_\_\_

<p><b>I certify the above information is valid; the funds expended will be used for the purpose given and there is no duplication of payment by another party.</b></p> <p>_____</p> <p><b>Assisted Veteran's Signature</b></p> <p>_____ <b>Date</b></p>
---

This form is to be attached to the SWR Grant Reporting Form along with a copy of the documentation for the expense. **No funds may be expended on a veteran unwilling to acknowledge receipt of the funds.**

**NOTE: Staple veteran need documentation (copy of billing statement matching veteran's name and address) to this form.**

Amount disbursed: \$ \_\_\_\_\_ **Attach a copy of the check that issued these funds.**

## Facility Donation Acceptance Form

**This form is to be completed in its entirety by the Facility Representative** not by MOPH. Government agencies such as the VA, State Veteran Homes, Vet Centers, etc. should have their own receipts that indicate the name of the facility on the receipt. **This form is for those facilities that do not have such receipts or those that use generic (store bought) receipt books.** ATTACH THE THANK YOU NOTE OR ACKNOWLEDGEMENT LETTER TO THIS RECEIPT FOR REPORTING PURPOSES.

### **Facility Representative to complete ALL of the following:**

Name of Facility: \_\_\_\_\_

Address of Facility: \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Facility Representative completing the form (**PRINT**) \_\_\_\_\_

Telephone (    ) \_\_\_\_\_ E-mail: \_\_\_\_\_

As the facility representative I verify this donation will be used in the following manner:

- Food
- Clothing
- Transportation Funds
- Equipment
- Toiletries
- Special Events
- Other:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

DONATION VALUE MUST BE LISTED.    VALUE: \_\_\_\_\_ Date \_\_\_\_\_

Signature and Date of Facility Representative \_\_\_\_\_

Date signed: \_\_\_\_\_ TITLE \_\_\_\_\_