SOUTHERN CALIFORNIA
VOLUNTEER MANUAL
“Supporting our troops and helping the families they leave behind”

~ You make a living by what you get. You make a life by what you give. ~

Winston Churchill

Dear Operation Homefront Southern California Volunteer,

Thank you for helping make a difference in the lives of our military families. Contributing your time is the most sincere expression of giving possible. Without your assistance, we cannot accomplish our mission of providing emergency financial and other assistance to the families of our service members and wounded warriors.

Each and every volunteer is a cherished and valued member of our team. No matter what assistance you provide or the number of hours you are able to contribute, rest assured that you are making a difference.

As members of our team, we encourage and welcome your suggestions and feedback, so please know you are empowered to provide them.

At the end of the day, you will have the knowledge that investing your time paid exceptional benefits in making the lives of our military families, particularly those with a deployed service member, better. While we can’t often totally resolve or eliminate the underlying problems facing these families, working together we can help to remove some of the stress with which they contend.

Thank you for becoming a member of our team.
J. S. Anderson
Colonel, U.S. Marine Corps (Retired)
President, Operation Homefront Southern California

~ Volunteers are not paid -- not because they are worthless, but because they are priceless. ~
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Volunteer Code of Ethics

The primary duty of volunteers is to help clients in times of crisis while encouraging and teaching them to become self-sufficient. Volunteers should avoid subsidizing irresponsible behavior of clients.

Because volunteers personally reflect the values and beliefs of Operation Homefront Southern California (OHSC), volunteers will make their best effort to represent the organization well – even when off duty.

Volunteers will act professionally and civilly at all times. Volunteers will respect the dignity of OHSC clients at all times, even if clients act inappropriately toward a volunteer or staff member. (Please report any client inappropriate language or conduct to the Chapter President.) Volunteers will honor their commitments and accept the consequences of their actions.

Your safety is our number one concern. Volunteers should never put themselves at risk. If a volunteer has concerns about their safety, they should immediately notify their direct supervisor and/or the Chapter President to determine the course of action. Helping a client is never worth risking safety.

Under no circumstances will a volunteer aid or abet a client in illegal activity, nor participate in illegal activity of any kind. If a volunteer becomes aware of a client conducting criminal activity, the volunteer shall report it to the Director of Client Services so the Chapter President can determine a course of action.

All client information is confidential. Volunteers will not share any details about the casework with anyone outside OHSC, including their spouses.

Volunteers will be loyal and faithful to OHSC. Volunteers will always speak well of OHSC in public, and will not relay any information regarding OHSC policies, procedures, financial status and donors.

Volunteers may request emergency assistance from OHSC in any area, but they must approach the Director of Client Services and process the request through the formal client process.
Volunteers will NEVER help themselves to donated products or services without official approval. Doing so would violate the trust of donors who so generously give to OHSC.

Volunteers will recognize that donors provide financial resources for OHSC’s work. When handling OHSC’s funds, volunteers will do so with integrity and honesty and in accordance with OHSC financial policies and guidelines.

To protect OHSC clients and the reputation of the Organization, a volunteer’s failure to adhere to this code of ethics will result in an investigation. If substantiated, this may lead to dismissal.
Volunteer Code of Ethics

Volunteer Agreement

As a volunteer I realize that I am subject to a code of ethics similar to that which binds the professionals in the field in which I volunteer. I, like them, assume certain responsibilities and expect to account for what I do in terms of what I am expected to do. I will honor the goals, rules and regulations of the program. I will keep confidential matters confidential.

I interpret volunteer to mean that I have been accepted as a “partner-in-service” and I expect to do my work according to the above standards.

If I have a complaint of any kind I will bring it to my direct supervisor and follow the OHSC policies and procedures outlined in this manual for resolution of the situation.

I promise to bring to my work an attitude of open-mindedness, a willingness to be trained and an interest and attention to the work that I do. I believe my attitude toward volunteer work should be professional. I believe that I have an obligation to my work, to those who direct it, to my colleagues, to those for whom the work is done, and to the public. I understand that volunteers may be dismissed at the discretion of the Chapter President.

Being eager to contribute all that I can to the goals of this program, I accept this Code of Ethics and will adhere to it carefully and cheerfully.

_____________________________________
Name

_____________________________________
Signature

_____________________________________
Date
Section A: Information for All Volunteers
About Operation Homefront-Southern California

MISSION:

Operation Homefront-Southern California (OHSC) provides emergency financial and other assistance to the families of our service members and wounded warriors.

VISION:

Through generous, widespread public support and a collaborative team of exceptional staff and volunteers, we aspire to become the provider of choice for emergency financial and other assistance to the families of our service members and wounded warriors. Where there is a need we do not provide, we will partner with others for the benefit of our military families.

VALUES:

Honor, Patriotism, and Service to Our Country: We believe those who wear our country’s uniform do so with a sense of duty, knowing they support the causes of freedom. We serve by serving them and their families.

Do What’s Right: We are committed to the highest standards of ethical conduct in all that we do. We believe that honesty and integrity engender trust, which is the cornerstone of providing our services. We are careful stewards of the resources provided by our donors. We strive to be good citizens and we take responsibility for our actions.

Respect Others: We recognize that our success as an enterprise depends on the talent, skills and expertise of our people and our ability to function as a tightly integrated team. We appreciate our diversity and believe that respect - for our colleagues, clients, partners, and all those with whom we interact - is an essential element of all positive and productive relationships.
Perform With Excellence: We understand the importance of our mission and the trust our clients and donors place in us. With this in mind, we strive to excel in every aspect of our activities and approach every challenge with a determination to succeed.
Who We Are, Where We Come From, and Who We Serve

A 501(c)(3) nonprofit organization, Operation Homefront was formed in February 2002. It was developed to support the families of deployed service members immediately following the terrorist attack on September 11, 2001. Operation Homefront is headquartered in San Antonio, Texas, and has evolved into a major nonprofit. OHSC currently provides services to military families across the nation with 23 chapters serving 32 states. The national office handles cases in states that do not have their own chapters. The majority of OH clients – 75 percent – are the lowest-paid service members, the E-1 through E-6 enlisted ranks. Within OHSC’s area of responsibility are 19 military installations and two military hospitals, with approximately 145,000 active duty members of the armed forces, plus their dependents. OHSC was proud to meet more than 11,400 morale and emergency financial needs in the 2009-10 fiscal year.

The target population is American military personnel and/or their families who have unmet needs due to financial hardship, death, injury, or physical or mental detriment as a result of service in Iraq or Afghanistan. These may include active duty, activated Reserve, activated National Guard and veteran service members. They are a diverse ethnic group (64 percent are minorities): approximately 20 percent are African-American; 5 percent Asian-American; 34 percent Hispanic/Latino; 5 percent Native American; and 36 percent Caucasian. Roughly 75 percent live at an income level 80 percent below the median income for the communities in which they reside.

OHSC is proud to have earned the highest rating – four stars – for three straight years from Charity Navigator, the nation’s top independent evaluator of nonprofit organizations. Nationally, $.95 of total revenue donated to Operation Homefront goes to programs. The tax ID number for OHSC is 20-305-1279. For financial statement and a copy of the OHSC 990 form, visit http://www.operationhomefront.net/socal/about.aspx?id=7683.

How We Help

OHSC provides direct services to alleviate a military family’s or individual’s actual/complete emergency financial burden, as well as counseling and/or recovery support. Emergency financial assistance is in the form of checks paid directly to mortgage lenders, auto mechanics, contractors, hospitals, doctors, dentists and other providers. OHSC provides other emergency funding assistance including:

- Financial assistance
- Emergency food
- Emergency home repairs
- Critical baby items: formula, food and diapers
- Home and appliance repair
- Furniture and household items
- Local moving assistance
• Community events
• Wounded Warrior Transitional Family Housing (run by OH National Headquarters)
• Morale events

For a more detailed list and description of OHSC programs, please refer to the beginning of Section B.

Organizational Structure

OHSC has a staff of seven people and we depend on Core Volunteers for a number of our vital day-to-day administrative operations. Please refer to the organizational chart in Appendix D to see the reporting structure of the organization. For questions or clarification, please contact the Director of Client Services.

Volunteer Mission Statement

Operation Homefront Southern California volunteers have the mission of assisting the staff implement the actions necessary to provide emergency financial and other assistance to the families of our service members and wounded warriors.

Size and Scope of Volunteer Program

OHSC has few paid staff and a wide area of responsibility. Without the dedicated support of volunteers, we would not be able to accomplish our mission. The assistance provided by volunteers allows us to keep our overhead low, which ensures most of the funding goes directly to our families. From our special event volunteers to our administrative volunteers, each person makes a life-changing contribution to our troops, the families they leave behind, and to our wounded warriors when they return home. **We rely on our volunteers to make sure we meet the needs of our clients.**

OHSC has over 400 volunteers, roughly 40 of which are considered “Core” Volunteers. Core Volunteers have additional training and responsibilities. They include Client Service Representatives, driver/delivery coordinators, and Speaker’s Bureau Volunteers. If you are interested in becoming a Core Volunteer, please let us know and we can tell you more! Every volunteer is very important to OHSC, from volunteers who work one-time events to those who work with us several days each week.

Many of OHSC volunteer opportunities can be done on your own schedule and/or without ever leaving the comfort of your home. If you have a talent or skill not listed above, never fear we can find a volunteer opportunity for you here at OHSC!
Since the paid staff cannot be at all area bases and regions at the same time, it is the ultimate goal of OHSC that the volunteers become skilled and autonomous enough to serve as representatives of the organization at OHSC’s satellite locations and those military bases at which OHSC doesn’t have paid staff.

All volunteers are expected to maintain professionalism while upholding the Operation Homefront’s Core Values and Beliefs and Code of Ethics at all times.

Volunteer Recruitment

OHSC welcomes and encourages anyone interested in learning more about volunteer opportunities to inquire about the OHSC volunteer program. Current methods by which OHSC actively receives and solicits volunteers include the following:

Web Based Recruitment/Inquiry: Prospective volunteers may submit information directly through the OHSC website after which they will receive a generated response email followed by a phone call from the Director of Client Services to discuss volunteer opportunities.

Event/Speaking Engagement Recruitment/Inquiry: Prospective volunteers may inquire or be solicited at an OHSC event (presentations, morale events, fairs, etc.) during which they may complete a Volunteer Interest Form (see Appendix D). Upon completion of the form, prospective volunteers will be contacted by the Director of Client Services to discuss volunteer opportunities.

Volunteer-Matching Websites: OHSC subscribes to the following websites to help encourage interested people to inquire about volunteer opportunities. Prospective volunteers may complete the Volunteer Interest Form via these websites after which the Director of Client Services will contact them.
  • OneOC (www.oneoc.org/5400/operation-homefront-southern-california/)
  • Volunteer Match (www.volunteermatch.org/search/org99948.jsp)
  • Volunteer San Diego (www.volunteersandiego.org)

Media/Social Media: OHSC has a Facebook page of which prospective volunteers can become fans and learn more about the organization: http://www.facebook.com/pages/Operation-Homefront-Southern-California/112579322108201 Weekly radio advertisements also encourage interested parties to contact OHSC to inquire about volunteer opportunities.

Unsolicited volunteer inquiries via phone or office visits are also welcomed and encouraged.

Want to Volunteer From Home?

Certain volunteer positions, such as Client Services Representative and Administrative Support Volunteer, can be done from the volunteer’s home. You don’t have to drive down to OHSC.
Headquarters to make a difference (although you are always welcome to come into the office if you want to)! Some basic computer equipment may be required to work remotely, so please ask the Director of Client Services for more information if you are interested in volunteering from home.

**Application Process & Training**

**Step 1:** If volunteer has not already spoken with OHSC (if they submitted an online application) the volunteer will receive a phone call to discuss their volunteer capabilities and where they would like to fit into the program.

**Step 2:** In conjunction with the Director of Client Services, the volunteer will decide on a position and complete a volunteer packet.

**Step 3:** Volunteer will meet with the person that will supervise their position to discuss the position in further detail.

**Step 4:** The volunteer should complete the Authorization and Consent to Release information form (see Appendix D) to allow for a background check.

**Step 5:** A background check will be conducted for any volunteer who will have access to either family or donor personal information.

**Step 6:** Training and/or a start date will begin subsequent to a satisfactory background check.

**Step 7:** Training will take place at mutually convenient day(s)/time(s) and may involve a conference call or Skype session with one or more other new volunteers. Training sessions and location may vary depending upon the position.

**Step 8:** You’ve completed your background check and training and you are now an official OHSC Volunteer ready to help our service members and their families – way to go!

High school students are welcome to volunteer for OHSC for certain volunteer jobs. If you know anyone interested, OHSC can find a role for him/her! Parent or guardian approval is required for minors to volunteer.

**We Want to THANK You: Volunteer Recognition**

OHSC would simply cease to exist if not for its dedicated volunteers. There are two main events a year in which the paid staff of OHSC publicly honor and recognize the hard work of its volunteers.

In December, there is a Winter Holiday Dinner in which we celebrate the season and reflect on the year’s work. In the Spring, OHSC hosts its Annual Volunteer Recognition Dinner, where the
volunteers with the most hours logged for the year are recognized and the Volunteer of the Year is acknowledged.

What OHSC Expects from All Volunteers

Punctuality and Attendance

OHSC expects you to volunteer on a reliable and punctual basis. Absenteeism, early departures, and late arrivals burden your fellow volunteers and OHSC. If you are unable to work a volunteer shift as scheduled, please contact the Director of Client Services as soon as possible. Volunteers are welcome to take time off from volunteering but it is imperative the volunteer notify OHSC in ADVANCE (at least two weeks) when they are leaving and are not able to fulfill their regular responsibilities. Continuing patterns of absences, early departures, or tardiness may result in the individual no longer being a volunteer at OHSC.

Timekeeping Procedures

Volunteers are asked to keep an accurate and complete record of their attendance and hours worked. It is important that OHSC have an accurate record of hours worked by volunteers for fundraising efforts and end-of-year reporting. Plus, the Organization wants to recognize the hard work of all of its volunteers at the annual recognition events, so an accurate record of hours served is essential. All time worked should be accurately and completely recorded on the time card on a daily basis and submitted to your supervisor at the end of each month. See Appendix D for a sample Volunteer Time Card.

Attire and Personal Appearance

OHSC has adopted a "business casual" dress code for employees, and therefore it is recommended that volunteers working in the office dress in the same manner. It is important to remember that “business casual” attire represents a professional appearance, and therefore attire must be clean, neatly pressed and in good repair.

Volunteers who work in the community or who participate in events or help with moving/furniture coordination will have different expectations for attire than office volunteers. Please check the “Volunteer Job Descriptions” in Section C for more information. Questions about attire should be directed to the Director of Client Services.
Conflict of Interest Policy

The purpose of the conflict of interest policy is to protect OHSC's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a volunteer, officer, director or member of OHSC or might result in a possible excess benefit transaction.

A person has a financial interest if the person has, directly or indirectly, through business, investment or family:

- **a.** An ownership or investment interest in any entity with which OHSC has a transaction or arrangement, or
- **b.** A compensation arrangement with OHSC or with any entity or individual with which OHSC has a transaction or arrangement, or
- **c.** A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which OHSC is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest.

In connection with any actual or possible conflicts of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with board governing delegated powers considering the proposed transaction or arrangement. If there is a question about a potential conflict of interest, please speak with the Director of Client Services.

The Board of Directors and President of OHSC are responsible for determining any potential conflicts of interest and have procedures in place to do so. Upon request, a detailed version of the OHSC conflict of interest policy is available.
Confidentiality

Information about OHSC, its employees, volunteers, clients, suppliers, and vendors is to be kept confidential and divulged only to individuals within OHSC with both a need to receive and authorization to receive the information. **If in doubt as to whether information should be divulged, err in favor of not divulging information and discuss the situation with the Director of Client Services or Chapter President.**

All records and files maintained by OHSC are confidential and remain the property of OHSC. Records and files are not to be disclosed to any outside party without the advance permission of the Director of Client Services or Chapter President. Confidential information includes, but is in no way limited to: financial records; business, marketing, and strategic plans; personnel; the identity of, contact information for, and any other account information on clients, vendors, and suppliers; inventions, programs, trade secrets, formulas, techniques, and processes; and any other documents or information regarding OHSC’s operations, procedures, or practices.

Confidential information may not be removed from OHSC’s premises without advance authorization from the Chapter President.

OHSC reserves the right to avail itself of all legal or equitable remedies to prevent impermissible use of confidential information or to recover damages incurred as a result of the impermissible use of confidential information and/or intellectual property.

Volunteers are required to enter into written confidentiality agreements confirming their understanding of OHSC’s confidentiality policies. (See Confidentiality and Proprietary Information Agreement in Appendix D.)

Electronic Communications System Access

OHSC uses electronic forms of communication to exchange information. Some volunteers have access to computers, e-mail, telephones, voicemail, fax machines, external electronic bulletin boards, wire services, on-line services, and the Internet (hereafter collectively referred to as “electronic communications system”). The electronic communications system and any information stored on it is company property and will be treated as such. The electronic communications system is provided for the purpose of facilitating OHSC’s business.

The following rules apply to all electronic communications that are: (1) accessed on or from OHSC’s premises; (2) accessed using OHSC’s computer or telecommunications equipment, or via Company-paid access methods; and/or (3) used in a manner which identifies the individual with OHSC. The following list is not exhaustive and OHSC may implement additional rules from time to time. These are the same rules that paid staff must follow.

1. OHSC’s electronic communications system may not be used for transmitting, retrieving, viewing, printing or storing any communications of a discriminatory or harassing nature,
or which are derogatory to any individual or group, or which are obscene or X-rated communications, or are of a defamatory or threatening nature, or for “chain letters,” or for any other purpose that is illegal or against OHSC's policy or contrary to the Organization's interests.

2. Some volunteers (e.g., Client Service Representatives) may choose to use their own personal e-mail accounts for Chapter business, and some may be given OHSC email accounts instead (usually per volunteer request). Instant Messaging may not be used on OHSC’s electronic communications system and volunteers are asked not to use OHSC computers for “web browsing” that is unrelated to their volunteer work. OHSC is aware that some of its volunteers may record and comment on aspects of their experience with OHSC in a public way, including by “blogging” or social networking. While OHSC does not prohibit this form of off-duty public communication by its volunteers, OHSC strongly cautions any employee who might make such communications to abide by the provisions of OHSC's Confidentiality policy. Any public disclosure of confidential information is strictly prohibited.

3. When volunteers use OHSC’s electronic communications system, they should not assume any electronic communications are private or confidential and should transmit sensitive information in other ways. OHSC may need to monitor, access or review the electronic communications system and its contents for a number of business reasons and it reserves the right to do so.

4. If volunteers use any security measure on OHSC-supplied computer, they must provide the Director of Client Services with a hard copy record (to be maintained in a secure location) of all their passwords for OHSC’s use if required. OHSC reserves the right to override any passwords to obtain access to information, as necessary for business reasons.

5. Volunteers must respect the confidentiality of other people’s electronic communications and may not attempt to breach computer or network security measures.

6. Anyone obtaining electronic access to other companies’ or individuals’ materials must respect all copyrights. To avoid viruses and potential copyright violations, no one may download any new software without the prior authorization of the Director of Operations.

7. All communications sent by volunteers via the electronic communications system must comply with this and other Organization policies, including the Anti-Harassment/Discrimination, Solicitations, Collections, Petitions and Confidentiality policies.
Reimbursement Policy

Expenses

Volunteers may be reimbursed for reasonable expenses incurred in the course of business. These expenses may include supplies or car mileage for personal vehicles. All expenses incurred must be approved by the Chapter President and submitted using the Expense Reimbursement Form (see Appendix D) to OHSC along with the receipts within 30 days of the date of the expenditure.

Reimbursement for all business expenses will occur in accordance with OHSC’s policies for such. Volunteers should contact the Chapter President in advance if they have any questions about whether an expense will be reimbursed.

Mileage

Volunteers who drive their personal vehicles while conducting OHSC’s business should promptly submit a mileage reimbursement form approved by the Chapter President detailing the number of miles driven on OHSC’s business time. OHSC will pay mileage reimbursement in accordance with applicable reimbursement rates. (See Mileage Reimbursement Form in Appendix D.)

Exit Interviews

The opinions of OHSC volunteers are very important in evaluating program policies and procedures. Please help us improve our volunteer management by answering the questions in our exit interview (see Appendix D). Your comments will remain anonymous.

Safety First, Always!

OHSC is committed to providing a safe workplace. Accordingly, OHSC emphasizes “safety first.” It is the volunteer’s responsibility to take steps to promote safety in the workplace and work in a safe manner. By remaining safety conscious, volunteers can protect themselves and their fellow volunteers, staff, clients, and others.

Volunteers are asked to promptly report all unsafe working conditions, accidents and injuries, regardless of how minor, to their immediate supervisors and/or the Director of Client Services so any potential hazards can be corrected, injured workers can be treated and other steps can be taken.

If a volunteer feels any job or situation is unsafe, do NOT engage in the activity. All volunteers have the right to feel safe at all times and personal judgment should always be exercised.
Some volunteer positions will have specific safety concerns. Please refer to your Volunteer Job Description for more information. Safety will be covered during your training, but if you have any additional questions or concerns, please ask!

**Insurance**

Volunteers will be treated like employees for liability and workers compensation matters. Refer questions to the Director of Client Services. Volunteers who drive a vehicle as part of their volunteer position need to have a valid driver’s license.

**Empowerment/Feedback**

At OHSC, the suggestions of volunteers are highly appreciated and taken very seriously. Please take it upon your own initiative to let the staff know your ideas for making programs or procedures better, at any level of the organization. Since it is the ultimate goal of OHSC to have volunteer liaisons at each satellite OHSC location, the ideas and advice of volunteers is critical to the success of the organization. The staff subscribes to the belief that if people are given the space and permission to come up with their own creative solutions, they will always exceed your expectations. We encourage all volunteers to be part of this process.

Volunteers are asked to keep in mind that volunteering for OHSC is a privilege, not a right. If a problem with a volunteer match is not able to be resolved, or if a volunteer violates the policies listed in this handbook, OHSC reserves the right to dismiss the volunteer. If this situation occurs, OHSC is committed to removing a volunteer in a matter that is respectful of a volunteer’s service.

For volunteers acting as Client Services Representatives, performance reviews are conducted annually between the Chapter President and the volunteer with the opportunity to discuss the volunteer’s job tasks, identify and correct opportunities for improvement, encourage and recognize strengths, and discuss methods for improving performance.

OHSC encourages all volunteers at OHSC to discuss job performance with their supervisors on an ongoing basis. If your volunteer time is not working out for you, please communicate with the appropriate person to discuss your situation. Perhaps a new assignment will solve the issue.
Open-Door Policy—Talk to Us Anytime!

As stated in the previous section, OHSC recognizes that volunteers will have suggestions for improving the workplace, as well as complaints. The most satisfactory solution to a job-related problem or concern is usually reached through a prompt discussion with your direct supervisor. We need your help to make OHSC an organization that is continually striving to serve our clients to the best of our ability and create a welcoming environment for all stakeholders, including volunteers!

If you do not feel comfortable contacting your supervisor or are not satisfied with the Director of Client Services’ response, please submit your complaint or suggestion in writing to the Chapter President, who will review your written submission and determine the appropriate action.

Retaliation Prohibited

If you see anyone—a fellow volunteer, client, or OHSC employee—doing anything inappropriate and you report it, you will not be retaliated against. Volunteers are protected from retaliation for opposing or reporting unlawful harassment or discrimination or for otherwise participating in processes connected with an investigation, proceeding or hearing conducted by OHSC or a government agency with respect to such complaints. Contract workers will be subject to termination of their engagement with OHSC for engaging in retaliation.

Drug & Alcohol Policy

OHSC maintains a **zero tolerance policy for drug and alcohol abuse** by its employees and volunteers while working or at an Organization function. The use of any illegal drugs, intoxicants, controlled substances or illegal use of legal drugs is strictly prohibited. Illicit drug use and indiscriminate alcohol consumption put everyone at risk and cannot be tolerated.

In keeping with our efforts to promote health and safety and protect the interests of our employees, volunteers, members, clients, and OHSC, we prohibit the possession, sale, manufacture, purchase of, and reporting to work under the influence of alcohol, illegal drugs, intoxicants, or controlled substances any time on OHSC’s premises, or while on OHSC’s business.

Driving a vehicle for OHSC’s business while being under the influence of alcohol or an illegal drug, intoxicant, or controlled substance is prohibited, as is violating any Organization rule or policy regarding alcohol and drug use.
Prohibited Acts & Discrimination/Harassment

Any harassment, whether directed at paid staff, clients, donors, or volunteers, minimizes productivity, scares away volunteer support, garners bad publicity, and erodes community (and donor) good-will.

OHSC is committed to providing a work environment free of sexual or any form of unlawful harassment or discrimination. Sexual harassment includes unwelcome sexual advances, requests for sexual favors and lewd, vulgar or obscene remarks, jokes, posters or cartoons, and any unwelcome touching, pinching or other physical contact. Other forms of unlawful harassment or discrimination may include racial epithets, slurs and derogatory remarks, stereotypes, jokes, posters or cartoons based on race, national origin, age, disability, marital status or other legally protected categories.

Harassment or unlawful discrimination against individuals on the basis of race, national origin, religion, sex, sexual orientation, disability or any other classification protected by state or federal laws is illegal and prohibited by the OHSC policy. Such conduct by or towards any volunteer, employee, contract worker, customer, vendor or anyone else who does business with OHSC will not be tolerated. To the extent a customer, vendor or other person with whom OHSC does business engages in unlawful harassment or discrimination, OHSC will take appropriate corrective action.

Volunteers who feel that they have been harassed or discriminated against, or who witness any harassment or discrimination by an employee, volunteer contract worker, customer, vendor or anyone else who does business with OHSC should immediately report such conduct to the Director of Client Services or Chapter President.

Do not allow an inappropriate situation to continue by not reporting it, regardless of who is creating the situation. In response to every complaint, OHSC will conduct an investigation and, if improper conduct is found, take appropriate corrective action.

To the extent that a volunteer is not satisfied with OHSC’s handling of a harassment or discrimination complaint, he or she may also contact the appropriate state or federal enforcement agency for legal relief. In California, the Department of Fair Employment and Housing can be contacted by consulting the government agency listings in the telephone book.
Section B: Volunteer Job Descriptions
Volunteer Opportunities Available

**Administrative Support**
Administrative Support volunteers assist in the office with a variety of administrative tasks such as writing letters, processing mailings, filing, working with writing memorandums, and working with databases and excels spreadsheets. This job is a behind the scenes position that allows Client Services Representatives the time to interact with the clients to ensure that everyone’s needs is met in a timely manner. The administrative support volunteer works primarily at OHSC headquarters on Miramar Road, however some tasks can be done from home.  
*Average Time Investment: 2-10 hours per week*

**Client Services Representatives (CSR)**
CSRs interact with clients on a personal level to assess the client’s needs and how OHSC can best meet those needs. CSRs take on a pseudo case worker role in helping the family apply for assistance from OHSC and will be in close communication with the family to ultimately support them in numerous ways. This is a flexible position that allows the volunteers to work from home and set their own hours depending on caseload.  
*Average Time Investment: 5-10 hours per week*

**Event Coordinators**
Event Coordinator volunteers are responsible for the success of OHSC events from beginning to end by ensuring proper planning is in place, marketing has reached the correct audience, equipment (tables, tents, banners) requirements are met and that volunteers are coordinated.  
*Average Time Investment: 5 hours per week*

**Event Support**
Event Supports are responsible for attending events or programs when available to assist with distribution, packing, sorting, moving, and/or delivering items to military families. Event support volunteers will be emailed when there are opportunities to participate in a specific event. For example, assisting at our back to school distribution event or sorting items prior to distribution.  
*Average Time Investment: 2-8 hours per event*
**Furniture Coordinator**
A Furniture Program Coordinator volunteer is responsible for facilitating the transport of donated furniture from donors to clients. The Furniture Program Coordinator will coordinate with the Moving/Transport Coordinator volunteer and will contact both donors and clients to coordinate pickup and drop off of donated items. This position allows the volunteer to work from home if desired.

*Average Time Investment: 2-10 hours per week*

**Marketing/Public Relations Coordinator**
Marketing/Public Relations Coordinator volunteers assist with the quarterly newsletter, marketing special events, and/or speaking to the public and community service organizations. The Marketing/Public Relations volunteer should have a strong desire to share the story of OHSC with the greater community. This position involves both office and home-based work.

*Average Time Investment: 2–5 hours per week*

**Moving/Transportation Coordinator**
Moving/Transportation Coordinators are responsible for delivering and transporting donations to families and/or warehouse for storage. The Moving/Transportation Coordinator works with the donation and project coordinators to ensure the items needed for events and/or projects are delivered in a timely manner. This position works with both drop off and pickup locations to ensure items are dropped off and picked up as needed.

*Average Time Investment: 5-10 hours per week.*

**Volunteer Coordinator**
Volunteer coordinators recruit volunteers to help with OHSC’s goals, while ensuring that all programs/events needing volunteers are staffed appropriately. The position includes recruiting new volunteers through community outreach and free advertising opportunities. Volunteer Coordinators interview applicants and provide orientation training for new volunteers. The volunteer coordinators maintain a volunteer database, volunteer files and keep track of individual volunteer activities, such as hours and training. The Volunteer Coordinator contacts volunteers regarding available opportunities and may hold monthly volunteer meetings to discuss upcoming events and ongoing activities. A one-year commitment is recommended for the volunteer coordinator position.

*Average Time Investment: 5-10 hours per week.*

**Warehouse Coordinator**
The Warehouse Program Coordinator is a volunteer position that manages an assigned warehouse. The position includes tagging all inventory over $50, organizing inventory and opening warehouse for pickup or delivery of donated goods.

*Average Time Investment: 2-10 hours per week.*
Short Description of OHSC Programs

**Appliance Repair:** The Appliance Repair Program is here to assist families with deployed or injured service members with unexpected appliance issues. Assistance may be in the form of pro-bono donated services, discounted services, referral or Operation Homefront financial grants to pay for the following: air conditioning, hot water heater, refrigerator, stove, and washer/dryer.

**Car Repair:** Operation Homefront is able to assist families of deployed or injured service members with car repair issues when their only vehicle has broken down. Assistance may be in the form of pro-bono donated services, discounted services, referral or Operation Homefront financial grants to pay for the following: towing services (not emergency towing but towing to the mechanic), diagnostic services, repair services.

**Computer/Communications:** Through the kind donations of the community, Operation Homefront is able to provide refurbished computers for military families. Seeing as though the items are coming from the community we don’t have control of when we will get computers in and when the need for the family will be fulfilled.

**Donated Vehicle:** Through the kind donations of the community, Operation Homefront is able to provide donated vehicles for military families who have no means of transportation. Seeing as though the vehicles are coming from the community we don’t have control of when we will get vehicles in and when the need for the family will be fulfilled.

**Emergency Financial:** Operation Homefront provides emergency financial assistance to military families experiencing devastating budget issues during deployment and injury recovery. Exceptions to this are at the discretion of the granting committee based on knowledge, experience, extenuating circumstances and client necessity. Operation Homefront makes payments directly to the creditor. Families are never given any monetary donation directly payable to them.

**Emergency Food:** Operation Homefront is able to assist families during difficult times with food boxes (including diapers and formula if needed) and gift certificates that enable them to manage
their food crisis until the next pay period. The food assistance program is designed to be a temporary measure, not a long term solution to chronic financial problems.

**Furniture/Household/Baby Items:** Through the kind donations of the community Operation Homefront is able to provide gently used furniture for military families. Seeing as though the items are coming from the community, Operation Homefront does not have control of when we will get items in and when the need for the family will be fulfilled. Operation Homefront will attempt to successfully assist all families with the items they need but we are not able to guarantee assistance at the time of need.

**Home Repair:** Operation Homefront will assist families of deployed or injured service members with unexpected home repairs not covered by home insurance or home warranty. Assistance may include the following: pro-bono donated services, discounted services, referrals or financial grants to pay for the following: electrical issues, general handyman repairs, general appliance repair, heating and air conditioning, pest control, plumbing, retrofitting for accessibility, roofing

**Moving Assistance:** Through the support of volunteers within the community, Operation Homefront is able to supply the physical labor or moving company for families with deployed or injured service members with local non-PCS moves. Assistance covers the following: moving to new/larger quarters, moving items in/out of storage units upon deployment or return from deployment, moving from civilian units into military housing, and loading and unloading trucks locally.

**Vision Care:** Operation Homefront is able to provide assistance purchasing medically necessary eyeglasses or contact lenses for military family members (not active military).
ADMINISTRATIVE SUPPORT
Volunteer Job Description

Administrative Support is a volunteer position that assists all members of the OHSC Management Team and primarily works in the office at OHSC Headquarters. The Administrative Support position shall report to the Director of Client Services.

*Average Time Investment: 2-10 hours per week*

**Personal Qualifications:**

- Professional phone etiquette
- Organized and enjoys performing administrative functions (data entry, phones, filling etc).
- Computer literacy and competency in Microsoft Word & Excel recommended
- Willingness and ability to lift light packages and supplies
- Attire at headquarters is business comfortable; staff dress in business casual so volunteer should look presentable but should also feel comfortable.

**Duties & Responsibilities**

- Update database, filing, mailings
- Coordinate with Volunteer Coordinator to update and maintain volunteer database
- Make phone calls
- Perform clerical related functions using Microsoft applications & the Internet
- Assist with website updates
- Assist with events as needed including filling packets, calling vendors, etc.
- Write thank you letters to community supporters
- Log and report hours to the Director of Client Services
Operation Homefront Southern California Chapter (OHSC):

www.operationhomefront.net/socal/

Address: 7128 Miramar Road #11, San Diego, CA 92121

Mailing Address: PO Box 26747, San Diego, CA 92196

Phone: 858-695-6810 or 866-424-5210

Fax: 858-695-6845
Supplies:

- 3-hole punch is in the Volunteer Office (supply room)

Computer:

- Just click on ‘OHSC’ versus ‘Volunteer’ and hit enter; you should not be prompted to enter a password
- To adjust the volume, go to Control Panel > Realtek HD Audio Manager
- Internet Access: Click on the SURFNET wireless connection
- If you lose connectivity: Disconnect and reconnect or reboot

Printer/Scanner Details:

- Model: Xerox WorkCentre 6400X PSName: XRX0000AAC36EFC PS
- Port Name: X_192_168_1_150
- To scan a document:
  - Place the document face up on the top tray
  - Press the ‘Workflow Scanning’ button
  - Select ‘Public’
  - Press the green ‘START’ button
  - Once the scan has completed, press the round ‘Services Home’ button
- To retrieve a scanned document:
  - From Internet Explorer click on ‘Favorites’
  - Select ‘Printer’
  - Click on the ‘Scan’ tab
  - Click on ‘Go’ next to ‘Download’
  - Click ‘Open’ to open the document or ‘Save’ to save a copy
  - Click on the ‘Delete All’ button to delete all scanned documents

Phone Procedures:

- Always notify Jay Anderson, Chapter President, of family calls no matter what, they are #1 priority!
- Jay Anderson may turn off his ringer so please look for him if he has an important call
- If the phone is beeping upon making an outside call, it means that there are voice messages or faxes in the queue
- Voice message retrieval (Listen to all unheard voice messages, send an email to the appropriate person and then delete the messages)
  - Option 1:
    - Dial 619-440-6600 and enter 6399327 for the password
Option 2:

- Go to the AT&T Unified Messaging website: 
- Click ‘Sign In’
- Enter email address = ohsocal@um.att.com
- Enter password = newyear
- Listen to all new messages, send an email to the appropriate person, and delete the messages.

Fax Procedures

- Go to the AT&T Unified Messaging website: 
- Click ‘Sign In’
- Enter email address = ohsocal@um.att.com
- Enter password = newyear
- Print copies of the faxes containing LES’s (Leave & Earning Statement) and ID’s and give to the Director of Client Services unless they were sent to the attention of someone in particular.
- Keep three (3) week’s worth of faxes.

Mail:

- Place all outgoing mail in the outgoing mail slot in the mailbox stand, which is located at the bottom of the stairs at OHSC’s main office.
- Get the keys from a staff member and check the Operation Homefront mailbox.
- Give all mail to the respective people and all other mail to Cyndy Gronbach.
- Do NOT accept for Medical Marijuana Clinic.
Donations:

- Forward all calls for donations to Cyndy Gronbach
- Please refer to Acceptable Donated Items Form (Appendix D) and note that OHSC does not accept stuffed furniture, such as stuffed chairs and sofas, or food. Refer to the documentation regarding Donations, including drop-off sites.
- Accepting Deliveries
  - Accept for Belly Dancers, ProFusion and Farmers Insurance (OHSC’s neighbors!) but do NOT sign.

**eTapestry System** ([www.etaperestry.com](http://www.etaperestry.com)): System is used to maintain contact information for all donors and to track all donations. The website is [www.etaperestry.com](http://www.etaperestry.com). In order to have access to the system, a unique user id will need to be setup for you that has permissions for the Southern California Chapter. Please review ETapestry Instructions in Appendix D for more detailed information.
COMMUNITY PRESENTER
Volunteer Job Description

The Community Presenter volunteer attends military and community functions and presents the mission and services of OHSC to the public throughout the year. The Community Presenter position shall report to the Director of Client Services.

Average Time Investment: 2-8 hours per event

Personal Qualifications:
- Comfortable with public speaking in both large and small groups
- Ability to interact with a variety of people in an open and professional manner
- Computer literacy and competency in Microsoft PowerPoint
- Access to a laptop is preferred
- Willingness to work unconventional hours (weekends, evenings)
- Availability for higher level of training
- Fluency in English
- Willingness and ability to lift light packages and event props
- Punctuality and appropriate attire required as directed by the Director of Client Services
- Must have access to email in order to coordinate event logistics with Director of Client Services
- Maintain a California driver’s license and must have access to reliable transportation

Duties & Responsibilities:
- This position involves public speaking
- Attend OHSC mandatory training sessions on presenting for both military and community functions
- Set up OHSC exhibit booth and attend community fairs, events, etc.
- Present OHSC’s mission and services at various events
- Distribute OHSC materials to attendees
- Answer questions of the attendees
- Recruit volunteers
- Complete and submit a Post Event Report to the Director of Client Services
- Log and report hours to the Director of Client Services at the end of the event
Community Presenter Checklist

Pre-Event Logistics

- Notify Director of Client Services ASAP if something precludes your participation
- Communicate with Director of Client Services in regard to onsite contact:
  - Name
  - Contact information (Email, cell, office number)
- Communicate with Director of Client Services in regard to:
  - Date and time
  - Support materials supplies needed (other than supply box)
  - Appropriate Attire
  - Directions
- Arrange with the Director of Client Services to have PowerPoint if applicable
- Pack and pickup presenter supply box prior to event (see below)
- Forms
  - Pickup mileage reimbursement form and record beginning mileage
  - Pickup copy of community and Military involvement form
  - Complete and submit Liability Release Form if applicable

Post-Event Logistics

- Return supplies and presenter supply packet to OHSC headquarters
- Restock supply box so it is ready for the next event (see below)
- Complete and submit Mileage Reimbursement Form if applicable
- Submit receipts for reimbursement if applicable
- Complete and submit a Post Event Report to the Director of Client Services
- Log and report hours to the Director of Client Services at the end of the event

Volunteer Supply/Event Box

- Pens
- General Business Cards
- Client Flyers
- Volunteer Interest Forms
- Plastic OHSC Sign with photo collage
- Military Presentation packet
- Notepad
- Small giveaway items (if in stock)
The Event Coordinator Volunteer assists with the planning and implementation of the various events that OHSC conducts in the community in an effort to promote and provide services to military families. The Event Support position shall report to the Director of Client Services.

*Average Time Investment: 40-80 hours per event*

**Personal Qualifications:**
- Strong communication skills and ability to accurately articulate OHSC’s mission
- Ability to work with a team & interact with a people in an open & professional manner
- Comfort level with overseeing events and serving as the point person for other volunteers
- Comfort level with meeting new people
- Willingness to work unconventional hours (weekends, evenings)
- Availability for higher level of training
- Fluency in English
- Willingness and ability to lift light packages and event props
- Punctuality and appropriate attire required as directed by the Director of Client Services
- Must have access to email to coordinate event logistics with Director of Client Services
- Maintain a California driver’s license and must have access to reliable transportation

**Duties & Responsibilities:**
- Planning and coordination of event as designated by the Director of Client Services
- Marketing and PR as designated by the Director of Client Services
- Direct setup and breakdown of the event: including assembling the OHSC tent, tables, chairs, displaying brochures, unloading trucks, opening boxes, sorting items, and anything else that is needed to prepare the event for opening.
- Hand out OHSC materials to attendees
- Answer questions about OHSC programs and events
- Recruit volunteers
- Be flexible and managing all aspects of an event: before, during and after
- This position requires lifting & loading of heavy items; close-toed shoes are recommended
- Attire: Appropriate attire as directed by the Director of Client Services
- Complete and submit a Post Event Report to the Director of Client Services
- Log and report hours to the Director of Client Services at the end of the event
Event Coordinator Checklist

Pre-Event Logistics

☐ Plan portions of event as designated by the Director of Client Services
☐ Notify Director of Client Services ASAP if something precludes your participation
☐ Communicate with Director of Client Services in regard to onsite contact:
  ▪ Name and Contact information (Email, cell, office number)
☐ Communicate with Director of Client Services in regard to:
  ▪ Date and time
  ▪ Support materials supplies needed (other than supply box)
  ▪ Appropriate Attire
  ▪ Directions
☐ Contact other volunteers to inform them of logistics described above
☐ Pack and pickup booth supply box prior to event (see below)
☐ Forms
  ▪ Pickup mileage reimbursement form and record beginning mileage
  ▪ Pickup copy of community and Military involvement form
  ▪ Complete and submit Liability Release Form if applicable

Post-Event Logistics

☐ Return supplies and event packet to OHSC headquarters
☐ Restock supply box so it is ready for the next event (see below)
☐ Complete and submit Mileage Reimbursement Form if applicable
☐ Submit receipts for reimbursement if applicable
☐ Complete and submit a Post Event Report to the Director of Client Services
☐ Log and report hours to the Director of Client Services at the end of the event

Volunteer Supply/Event Box

☐ Pens
☐ General Business Cards
☐ Client Flyers
☐ Volunteer Interest Forms
☐ Plastic OHSC Sign with photo collage
☐ Military Presentation packet
☐ Notepad
☐ Small giveaway items (if in stock)
EVENT SUPPORT
Volunteer Job Description

The Event Support Volunteer assists with the various events that OHSC conducts in the community in an effort to promote and provide services to military families. The Event Support position shall report to the Director of Client Services.

Average Time Investment: 2-8 hours per event

Personal Qualifications:
- Strong communication skills and ability to accurately articulate OHSC’s mission
- Ability to work with a team & interact with a variety of people in a professional manner
- Comfort level with meeting new people
- Willingness to work unconventional hours (weekends, evenings)
- Availability for higher level of training
- Fluency in English
- Willingness and ability to lift light packages and event props
- Punctuality and appropriate attire required as directed by the Director of Client Services
- Must have access to email in order to coordinate event logistics with Director of Client Services
- Maintain a California driver’s license and must have access to reliable transportation

Duties & Responsibilities:
- Setup and breakdown of the event: including assembling the OHSC tent, tables, chairs, displaying brochures, unloading trucks, opening boxes, sorting items, and anything else that is needed to prepare the event for opening.
- Hand out OHSC materials to attendees
- Answer questions about OHSC programs and events
- Recruit volunteers
- Be flexible and open to managing an area of the event: before, during and after
- This position requires lifting and loading of heavy items; close-toed shoes are recommended
- Attire: Appropriate attire as directed by the Director of Client Services
- Complete and submit a Post Event Report to the Director of Client Services
- Log and report hours to the Director of Client Services at the end of the event
Event Support Checklist

Pre-Event Logistics

- Notify Director of Client Services ASAP if something precludes your participation
- Communicate with Director of Client Services in regard to onsite contact:
  - Name
  - Contact information (Email, cell, office number)
- Communicate with Director of Client Services in regard to:
  - Date and time
  - Support materials supplies needed (other than supply box)
  - Appropriate Attire
  - Directions
- Pack and pickup booth supply box prior to event (see below)
- Forms
  - Pickup mileage reimbursement form and record beginning mileage
  - Pickup copy of community and Military involvement form
  - Complete and submit Liability Release Form if applicable

Post-Event Logistics

- Return supplies and event packet to OHSC headquarters
- Restock supply box so it is ready for the next event (see below)
- Complete and submit Mileage Reimbursement Form if applicable
- Submit receipts for reimbursement if applicable
- Complete and submit a Post Event Report to the Director of Client Services
- Log and report hours to the Director of Client Services at the end of the event

Volunteer Supply/Event Box

- Pens
- General Business Cards
- Client Flyers
- Volunteer Interest Forms
- Plastic OHSC Sign with photo collage
- Military Presentation packet
- Notepad
- Small giveaway items (if in stock)
FURNITURE PROGRAM COORDINATOR
Volunteer Job Description

A Furniture Program Coordinator volunteer is responsible for facilitating the transport of donated furniture from donors to clients. The Furniture Program Coordinator position shall report to the Director of Client Services.

Average Time Investment: 5-15 hours per week

Personal Qualifications:
- Strong communication skills are recommended and a comfort level with cold calling donors and clients in regard to the coordination of donated furniture
- Ability to work with a team and interact with a variety of people in an open and professional manner
- Computer literacy and working knowledge of Microsoft Excel
- Access to email required
- Close-toed shoes required if moving furniture
- Maintain a California driver’s license and must have access to reliable transportation

Duties & Responsibilities:
- This position allows volunteer to work from home if preferred
- Contact donors and record contact information and items they wish to donate in the Furniture Database within 24-48 hours of receiving the call sheet
- Provide a copy of the Acceptable Donated Items list to donors
- Communicate OHSC’s donor drop-off/client pickup procedures to donors and clients
- Record clients’ information and furniture needs on the Furniture Database
- Work with the Moving/Transportation Coordinators to organize pick-ups and deliveries
- Manage the Furniture Database and provide an updated copy to the Director of Client Services twice a month (15th and the last day of the month)
- Log and report hours to the Director of Client Services at the end of the month
Furniture Program Coordinator Checklist

☐ Obtain the furniture database via the Director of Client Services
☐ Obtain call sheet from the Director of Client Services
☐ Contact donor:
  ▪ Review call sheet and contact each donor within 24-48 hours
  ▪ Record contact information and items donated in the Furniture Database
  ▪ Provide Donation Guideline list to donor to illustrate acceptable donated items
  ▪ Provide donor drop-off/client pickup procedures to donor
☐ Contact client:
  ▪ Record client’s information and furniture needs in Furniture Database
  ▪ Provide donor drop-off/client pickup procedures to client
  ▪ Work with the Moving/Transportation Coordinators to organize pickup and delivery
☐ Record completed furniture transaction in the Furniture Database and provide an updated copy to the Director of Client Services twice a month (15th and the last day of the month)
MOVING/TRANSPORTATION COORDINATOR
Volunteer Job Description

A Moving/Transportation Coordinator volunteer is responsible for assisting clients and donors with the transport of various items, including but not limited to, donations from the community and assistance with local moves for military service members. The Moving/Transportation Coordinator position shall report to the Director of Client Services.

Average Time Investment: 5-15 hours per week

Personal Qualifications:
- Ability to work with a team and interact with a variety of people in an open and professional manner
- Comfort level meeting new people and entering client homes during furniture transport process
- Willingness to wear a weight belt and ability to solo lift items up to 75lbs and to assist with larger items
- Close-toed shoes required and appropriate attire as directed by the Director of Client Services
- Cell phone required to coordinate pickup/drop off
- Maintain a California driver’s license and respectable driving record

Duties & Responsibilities:
- Meet with donors to pick-up items and deliver donation to appropriate client
- Work with the Furniture Coordinator to facilitate the delivery of furniture
- Contact Saturn Dealerships twice a month to inquire about pick-up needs
- Communicate and provide a copy of OHSC’s Donation Guidelines to donors
- Deliver donations to one of the Warehouses or directly to the client as needed
- Assist with client household moves of goods
- Assist with the transport of items before, during and after OHSC events
- Log and report hours to the Director of Client Services at the end of the month
Moving/Transport Coordinator Checklist

**Pre-Move Logistics:**

- Notify Director of Client Services ASAP if something precludes your participation
- Communicate with Furniture Program Coordinator in regard to:
  - Pickup/drop off contacts (names, cell phone numbers)
  - Pickup/drop off schedule
  - Pickup/drop off locations and directions
- Pickup moving van from OHSC headquarters
  - Check vehicle for sufficient fuel
  - Complete beginning mileage in mileage log
- Pickup weight belt from OHSC headquarters
- Pickup any necessary handcarts or dollies
- Pickup donation forms from OHSC headquarters
- Complete and return Liability Release Form if applicable

**Post-Move Logistics**

- Return weight belt to OSC headquarters
- Return van to appropriate location
- Log and report hours to the Director of Family Services at the end of the month
- Complete mileage log in vehicle
- Complete and submit Mileage Reimbursement Form if applicable
PUBLIC RELATIONS/MARKETING COORDINATOR
Volunteer Job Description

Marketing/Public Relations Coordinator is responsible for the monthly newsletter, marketing special events, working with media, issuing press releases and enhancing the organization’s public image. This individual will be responsible to develop opportunities for positive public relations and exposure for the OHSC. The Marketing/Public Relations Coordinator will gain experience in public relations, desktop publishing, writing, and communications.

Average Time Investment: 1 – 5 hours per week

Personal Qualifications:
- Experience in public relations, either through education, professional experience, or both
- Good connections within the local PR community is a plus but not essential
- Experience developing or following marketing/PR plans a plus but not essential
- Ability to write concise and thorough press releases and to distribute to local and regional media
- This person should be articulate and should have excellent writing skills
- Fluency in spoken and written English required; Spanish-speaking is preferred but not essential
- Available to work a minimum of 1-5 hours per week during Monday-Friday between the hours of 9:00a.m. to 5:00 p.m. Evening or early-morning might be needed if media will be present at OHSC events.
- Some work might be able to be completed offsite. Attendance at weekly staff meetings is recommended so that the volunteer is aware of current OHSC activities
- Copyediting and basic graphic design skills required Photography skills preferred

Duties & Responsibilities:
- Develop a marketing plan for the organization, for use by subsequent staff or volunteers
- Arrange speaking engagements for Board members, and paid staff
- Write two monthly newsletters, The Dispatch (for civilians) and The Bugle (for military)
- The content will be provided by paid staff
- Send notices of upcoming OHSC events to local media
- Assist in management of OHSC social media, including Twitter and Facebook
VOLUNTEER COORDINATOR
Volunteer Job Description

Volunteer coordinators recruit volunteers to help with OHSC’s goals, while ensuring that all programs/events needing volunteers are staffed appropriately. The Volunteer Coordinator position shall report to the Director of Client Services.

*Average Time Investment: 5-10 hours per week*

**Personal Qualifications:**
- Strong communication skills and ability to accurately articulate OHSC’s mission
- Ability to work with a team and interact with a variety of people in an open and professional manner
- Comfort level with overseeing events and other volunteer activities and serving as the point person for other volunteers
- Comfort level with meeting new people
- Comfort level with leading volunteer training sessions
- Willingness to work unconventional hours (weekends, evenings)
- Availability for higher level of training
- Fluency in English
- Punctuality and appropriate attire required as directed by the Director of Client Services
- Must have access to email in order to coordinate event logistics with Director of Client Services
- Maintain a California driver’s license and must have access to reliable transportation

**Duties & Responsibilities:**
- Interview applicants and provide orientation training for new volunteers
- Maintain a volunteer database, volunteer files and track individual volunteer activities, such as hours and training
- Computer literacy and working knowledge of Microsoft Excel
- Contact volunteers regarding available opportunities and may hold monthly volunteer meetings to discuss upcoming events and ongoing activities
- Coordinate coverage for special events and typically attend those events
- Coordinate volunteer committees for large events
- Coordinate Event Support and Community Presenter volunteers to represent the organization at expos, seminars and other community programs
- Responsible for volunteer recognition and thank you
- Contribute to the monthly newsletters detailing volunteer activities and recognizing certain volunteers
- Write reports and evaluations in order to recommend changes that would help the program
- Log and report hours to the Director of Client Services at the end of the event
WAREHOUSE COORDINATOR
Volunteer Job Description

The Warehouse Program Coordinator is a volunteer position that manages an assigned warehouse. Warehouse volunteers shall report to the Director of Client Services.

Average Time Investment: 5-15 hours per week

Personal Qualifications:
- Strong communication skills are recommended and a comfort level with cold calling donors and clients in regard to the coordination of donated furniture
- Ability to work with a team and interact with a variety of people in an open and professional manner
- Willingness to wear a weight belt and ability to solo lift items up to 75lbs and to assist with larger items
- Computer literacy suggested
- Access to email required
- Close-toed shoes required if moving furniture

Duties & Responsibilities:
- Uphold the confidentiality of families who visit the warehouse
- Maintain warehouse including: periodically wiping off shelves, sweeping, organizing donations, removing trash and unacceptable donated goods
- Assist with warehouse clean up days and any events that take place at the warehouse
- Contact the approved client within 24-48 hours of being notified of their needs to coordinate pick-up of approved items from warehouse
- Contact and meet donors who are able to drop off donations at the warehouse
- Help clients navigate the warehouse, including providing directions, gate and parking procedures and restrictions on goods received
- Provide updated schedule to Director of Client Services of when Warehouse will open
- Inform Director of Client Services once a client has received approved items from warehouse
- Ensure Donated Item Forms are filled out entirely and are placed in the Completed Documents Folder for pickup by/delivery to the Director of Client Services
- Ensure that all items over $50 value including all donated furniture receives an inventory tag and that a copy is placed in the Completed Documents Folder
- Ensure that all non-core warehouse volunteers sign the Volunteer Liability Release Form and place a copy in the Completed Documents Folder
- Work with the Moving/Transportation Coordinators to organize pick-ups and deliveries
- Secure and lockup the facility when leaving
- Log and report hours to the Director of Client Services at the end of the month
- Other duties assigned by the Director of Client Services
Warehouse Program Coordinator Checklist

Client pickup logistics

- Coordinate with the Director of Client Services to:
  - Obtain client’s information along with what the client is approved for
  - Provide the Director of Client Services an updated schedule of when the warehouse is opening
- Coordinate with client in regard to the following:
  - Call or email the client with the date and time the warehouse will be open
  - If client does not respond after 3 contact attempts note this on the log and the close case
  - Notify the Director of Client Services of closed cases due to unresponsive clients
- Log date and time of client contact and email this form to the Director of Client Services weekly
- Check- in Clients at Warehouse
  - Check ID and include ID info, expiration date and your initials on Donated Items Form
  - Complete *Categories of Assistance* portion to note what the client is receiving (see below)
- Inform the Director of Client Services once a client has been to warehouse and received items
- Secure and lock facility upon leaving
  - Lock gate near desk as well as gate near the restroom down the hall and to the right

Inventory & Maintenance

- Complete and sign the Liability Release Form and leave copy in the Completed Documents Folder
- Tag all items over $50 (top white copy goes into paperwork processing area. Bottom tag is affixed to item)
- Sweep & wipe down the area
- Empty the trash bins before leaving
- Secure and lock facility upon leaving
  - Lock gate near desk as well as gate near the restroom down the hall and to the right

*Categories of Assistance*: Clients are pre-approved in some or all areas listed below. In some cases clients are approved while the warehouse coordinator is already at the warehouse in which case OH staff will try to call an notify the warehouse coordinator immediately.

- **Furniture/Household**: If client is approved for furniture, redeem this tag and mark the inventory number and description of item on the Donated Items Form. Tape tag to the form and place in designated paperwork processing area.
SOUTHERN CALIFORNIA

Section C:
CLIENT SERVICES REPRESENTATIVE HANDBOOK

Updated December 2010
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**Message from the Chapter President**

Welcome to the Operation Homefront Southern California Team.

As a volunteer Client Services Representative (CSR) for Operation Homefront Southern California (OHSC), you are an ambassador of the organization and provide that critical first impression to serving the military community. When they hear your voice, you are the reputation of Operation Homefront and all that we do to serve military families. This is a huge responsibility and one that I want you to take seriously and of which to be very proud.

When clients call for assistance, you have this awesome opportunity to help them. Take this opportunity to help them in a multitude of ways. Our first question should always be, “How can I help this family?” If they do not qualify for our programs, then ask yourself where we can refer them to, and what else may be done to provide them assistance? Take advantage of having them on the line and confiding in you about their situation and help in any way that you can.

Please remember that when a client calls they may be in crisis. You are the calming voice of support for them and they may be apprehensive about calling and asking for help. This is important as they may disclose personal information to you and you may need to assess their needs and refer them out to a program and/or service that we do not offer. Take this moment to listen to them, hear their needs, and then offer the assistance and guidance that we are able to. Never make promises that you cannot keep. We can refer people to resources outside of OHSC where they can get the help they need and deserve.

One of the ways in which we help families is through education about their situation by offering simple guidance. We treat all families with respect and should never be condescending in action or communication. You are in a place of honor when you help military families and they deserve our utmost respect. Simply listen and let them know how our procedures work and for what they may qualify. You have referrals that you can provide to them. You can help them make needed changes just by making suggestions about budgeting.

Never argue with a client. They are in a tight spot and it takes a lot just to ask for help. Treat them with dignity; remain calm, helpful, and respectful at all times. If you do not know how to help, please refer to your supervisor and call them back.

Make every effort to follow through with a family, even though they may be difficult to reach. It’s important that we try our best to serve them in the best way possible. I am proud of the work that we do and I am happy that you have decided to assist us in carrying out our mission. Our volunteers are our single most precious asset. Thank you for being here and allowing us to do this great work!

**Jay Anderson**  
Colonel, U.S. Marine Corps (Retired), President, Operation Homefront - Southern California
Overview
Below is a step-by-step process of the job of the Client Services Representative (CSR). Detailed instructions of each step are included in this manual as a reference if you have any questions regarding policies and procedures and applying for assistance.

The following is a CSR step-by-step guideline to helping families apply for assistance to Operation Homefront Southern California:

**Step 1: CALL SHEET PROCEDURE:** You will receive a call sheet with the name and contact information of someone asking for assistance, or you will receive the name and case number assigned by our online Military Application For Assistance (MAFA) system. You will be assigned clients to contact and assist based on your availability and schedule. You will keep track of your clients by using the call sheet to create a CSR Monthly Hours and Call Log as you will need to turn these in on a monthly basis, which will include the number of volunteer hours you have provided. (Refer to CSR Appendix).

**Step 2: INITIAL CONTACT WITH THE CLIENT:** Contact the client and assist with completing the online application and explain how the application process works. Please try and contact a client a minimum of three times and give them ample time to get back to you (two days) before recommending that the case be closed due to non-response (noting contact attempts and means in MAFA).

**Step 3: ASSESS THE CLIENT’S APPLICATION:** Review the application with the client and take the time to find out all of their needs and provide referrals to other resources offered by Operation Homefront Southern California and other collaborating agencies when applicable. (OHSC staff will provide CSR volunteers with possible resources).

**Step 4: THE CASE IS READY TO REVIEW:** Once the application is complete, email the Director of Client Services. Include your analysis of the client’s request for assistance and financial overview and be sure to include your recommendation based on the Standard Operating Procedures (SOP) Refer to Programs and Standard Operating Procedures Pages 71-89.

**Step 5: THE DECISION PROCESS:** This entails the Director of Client Services conferring with another staff member (President or Director of Operations) to approve or disapprove the client’s request for assistance. Anticipated response is typically within 24-48 hours, depending on case specifics.

**Step 6: INFORM THE CLIENT OF THE DECISION:** Contact the client and inform them of the decision and request supporting documents (if any) to complete the case.

**Step 7: FOLLOW UP FOR SUPPORTING DOCUMENTS:** Follow up with the family if necessary documents are not received. After three requests for documents, make a recommendation to the Director of Client Services to close the case due to non-responsiveness (noting contact attempts in MAFA if applicable).
Step 8: **CSR MONTHLY HOURS AND CALL LOG:** At the end of each month, send a call log to the Director of Client Services containing the total hours you volunteered that month. If you do not volunteer that month, still notify the Director of Client Services so that they can mark off that you reported your hours for the month. (Refer to CSR Appendix).

**Call Sheet Procedures**

- A call sheet is the system implemented to assist in both logging and tracking Client Services Representative (CSR) calls. Calls are transcribed from messages, emails or from applications submitted online (MAFA) and placed in the Call Sheet for distribution to the CSR.
- Call Sheets are distributed twice daily, once in the morning at 10:00 A.M. and once in the afternoon at 4:00 P.M. The top of the Call Sheet will indicate the date and time of day that the Call Sheet is distributed.

Sample Call Sheet:

<table>
<thead>
<tr>
<th>Call # &amp; ID</th>
<th>MAFA #</th>
<th>Client Name</th>
<th>Assigned</th>
<th>Attempts (Date)</th>
<th>Status (Open/Closed)</th>
<th>Case-worker Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mafa # 9999 /John Smith # 555-555-5555 &quot;needs food&quot;</td>
<td>Lori</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Mafa # 8888/Joan Doe #555-5555-5555 “needs vehicle repair”</td>
<td>Denise</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Call Sheet

### Table: Call Sheet

<table>
<thead>
<tr>
<th>Call &amp; ID</th>
<th>MAFA #</th>
<th>Assigned</th>
<th>Attempts (Date)</th>
<th>Status (Open/Closed)</th>
<th>Case-worker Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Mafa # 7777 / John Smith</td>
<td>Twanya</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes:

- **Call & ID**: Client # for the shift, i.e., morning (AM) or afternoon (PM).
- **MAFA #/Client Name/Contact Info/Request**:
  - **MAFA #**: client name, contact information and their request.
- **Assigned**: The CSR that is assigned to the call.
- **Attempts (Date)**: A place for the CSR to log in the times and days that they attempted to contact the client.
- **Status (Opened/Closed)**: The CSR will log the actions taken on the case.
  - Examples are (Left message, wrong number, made appointment, spoke to “name”, hang-up, sent application, open, closed)
- **Case-worker Notes**: The CSR will log any important information about the case in this area. Notes are for CSR use only. Case notes are also recorded in the online Military Application For Assistance (MAFA).

## How to Read the Call Sheet

1. **Call # & ID**: Client # for the shift, i.e., morning (AM) or afternoon (PM).
2. **MAFA #/Client Name/Contact Info/Request**:
   - **MAFA #**: client name, contact information and their request.
3. **Assigned**: The CSR that is assigned to the call.
4. **Attempts (Date)**: A place for the CSR to log in the times and days that they attempted to contact the client.
5. **Status (Opened/Closed)**: The CSR will log the actions taken on the case. Examples are (Left message, wrong number, made appointment, spoke to “name”, hang-up, sent application, open, closed)
6. **Case-worker Notes**: The CSR will log any important information about the case in this area. Notes are for CSR use only. Case notes are also recorded in the online Military Application For Assistance (MAFA).

## Using the Call Sheet

1. **RECEIVING THE CALL SHEET**: A Morning Call Sheet and an Afternoon Call Sheet will be emailed to the CSR on their scheduled work day/days. *(Please note that if an assigned client calls back into the office, the CSR who is assigned to that client will be sent an email with the message details.)* Upon receipt of the email that includes your call sheet assignments, please reply to the email with a simple, “got it,” to inform the Director of Client Services that you received it.
2. **RECORDING ASSIGNED CASES**: The CSR will record their assigned cases into a personalized Master Call Sheet called *Volunteer Name_Month_Hours and Call Log.* *(Jane Doe_December Hours and Call Log)*. The CSR will do this for all of the call sheets for the month, compiling a comprehensive list of the month’s assigned calls on one spreadsheet. Please refer to the **CSR Monthly Hours and Call Log Template** *(CSR Appendix ).
3. **MONTHLY HOURS AND CALL LOG**: At the end of the month, the CSR must email their monthly volunteer hours worked and call log to the Director of Client Services. It is important to keep accurate records of your volunteer hours, as fundraising efforts need to demonstrate OHSC’s strong volunteer program. *(CSR Appendix).*

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d. **MAKING INITIAL CONTACT WITH THE CLIENT:** All initial calls to the clients must be made within **24 hours** of receipt of the Call Sheet. Example: if you get call sheets on Monday you are required to attempt to make contact with the family by the end of the day Tuesday. If you are unable to contact your families you must notify the office immediately. After making initial contact with the client, please follow up with an email to the Director of Client Services with either of the following correspondence codes: “LM = left message, or MC = made contact,” so that he/she can note in his/her database that initial contact has been made with the client. You do not need to inform the Director of Client Services of your 2nd and 3rd attempts to reach the client, as all attempts and additional information will be recorded into the MAFA system.

e. **MAKE AT LEAST THREE ATTEMPTS TO CONTACT THE CLIENT:** Please give the client an opportunity to return the calls.

f. If a client does not call back after three initial attempts, it is okay to close out the call in the **Status (Open/Closed)** area and make a recommendation to the Director of Client Services that the case be closed. Or if you have conducted the initial phone interview with the client and told them to fill out the application and after three separate attempts to follow up on the status of the application and they won’t return the call, it is okay to close out the case.

g. If there are open calls and a new month begins, transfer the open calls to the new month’s Monthly Hours and Call Log.

2. **When to Recommend Closing Out the Case**

   a. After three attempts to initially contact a client and the client remains unresponsive, the CSR will make a recommendation to the Director of Client Services to close out the case.

   b. If a client is approved for assistance and the CSR has requested documents from the client three times and the client is unresponsive, the CSR will recommend that the Director of Client Services close out the case.

   c. A client should be noted as closed when directed by the Director of Client Services.
Application Procedure

General Guidelines:

An Application must be completed by/for all clients requesting assistance.

Understanding the Application: There are two types of information the application asks for:

1. Personal Information (must be completed for all requests).
2. Income/Expense Statement (does not need to be filled out for most furniture\(^1\) and computer requests\(^2\))

Obtaining Documentation: We will need a copy of the Service Member's valid Military ID and a copy of their Leave and Earnings Statement (LES). This information can either be scanned and uploaded into the MAFA system or faxed to the San Diego office. Please do not ask the client to email you a scanned copy of these documents, as we are unable to control privacy settings and security. The MAFA system is a secure system. The client can upload their documents via the OHSC website, or fax the information to the OHSC office. Documents should be shredded after the information is uploaded onto MAFA.

Completing the Assistance Application:

The CSR can assist the client with completing the application in one of two ways (1) call the client and verbally fill out the application over the phone with the client or (2) direct the applicant to our website: [www.operationhomefront.net/socal](http://www.operationhomefront.net/socal) to complete the online application. With either method, the CSR needs to verbally review the entries with the client before sending the application to the office for approval.

The following are questions to assist you in completing the application. This list is not all-inclusive. The client interview will help you understand the immediate needs of the family and how we can best assist. During the interview, be cautious not to offer a client false hope of an approval. Asking a client in a high stress situation to complete documents and then subsequently

\(^1\) Furniture request exception: Crib and car seat requests must fill out Part II of the application. Additionally, E7 and above must complete Part II

\(^2\) Service members that are not deployed or deploying within 3 months or whose pay grade is over E6 must complete Part II.
denying them creates unnecessary stress. Consider giving a non-qualified client the option of not completing the application.

**Sample Questions to Ask During the Interview Process**

**General/All:**

- Is there any other income in the home such as: Is your spouse employed? Do you own rental property and receive income?
- Do you receive or pay child support?
- Are all children listed, living in the household full time?
- What are the top three things that are causing your financial stress at this time?
- What created this circumstance/crisis?
- Is there a long-term plan for financial success?
- How much can you contribute toward the repair/bill?
- Where else have you applied for assistance? (You may want to get the client's permission to collaborate with that agency to prevent duplication of services)
- What corrective action have you taken to remedy the financial situation?

**Deployed Specific:**

- When did the Service Member (SM) deploy? When is the SM expected to return?
- Are you receiving the special deployment pays yet?

*Although most items on the application seem self explanatory, it is important to go line by line with the client to ensure that all items are correctly filled out to expedite the application process. This is especially true for the income and expense section of the application.

**Reviewing Family Information:**

1. Email address: This is the email that the family would like us to use for contacting them. Please reassure the client that their email address will not be given to third parties.
2. Member's Pay Grade: Should be E-(number between 1 and 9) or O-(number between 1 and 9). Please do not include their Rate or Rank (ex. Staff Sergeant, Petty Officer, HT1, etc.)
3. Member's Years in Service.
4. Member's Command: This is the particular unit/command they are assigned to, not the base itself – needs to be specific – for example 1st ANGLICO, or USS Pearl Harbor or BMU1; Service Member's base should also be entered.
5. Home address: Please ensure that the full address is included. Please inquire if they own, rent, or live in military housing, as this will affect other expenses.
6. Home Phone: This must include the area code.
7. Cell Phone: This must include the area code.
8. Referred by: Please have them include what agency as well as a contact person if applicable.

9. Previous Assistance: Please ask them if they have EVER received assistance from Operation Homefront and include this in the general information section. Client history is checked before assistance is considered.

10. Currently Deployed: Please only indicate deployments over 30 days. If the Service Member is going to deploy soon but has not yet, please indicate the estimated dates only if the deployment is within a couple of months.

11. Dependents Other Than Spouse: Please only include dependents that are living in the house or indicate that the dependent does not live in household full time in the general information section.

12. Assistance Required: Include the type, total dollar amount and if the client can pay a portion of the requested amount. If so, please include the amount of their contribution.

13. Explanation: Please have the client be as specific as possible as to what kind of assistance is requested and why it is needed at this time. Operation Homefront does not assist with generic “bills.”

For example:

**Example of a Good Description:** Due to the unexpected death of my father, we assisted my family with funeral costs. As a result we were unable to pay for our electricity bill for a couple of months. We have been notified by the electric company that we have to pay our bill in full by Friday or it will be disconnected. We owe $460 for our electricity bill and we are unable to pay it.

**Example of a Poor Description That May Be Denied:** Due to the unexpected death of my father, we assisted my family with funeral expenses. As a result we are behind on bills. We need you to help us with our bills.

OR

We need you to help with bills as we are very behind and can’t pay them.

**Reviewing Income/Expense Statement:**

This portion is used to make a determination about the type of assistance we can provide so please review every portion with the family for accuracy. If their response seems low, high or questionable, it is okay to ask the family for clarification and discuss it. Please reassure them that all information provided is kept strictly confidential. If you have those questions, chances are the review committee will as well and it will shorten the review period if questions are asked up front and answers are submitted by the CSR.
Use this time to informally advise the family about their spending, make suggestions and provide some educational tools. For some families this is the first time they may be reviewing their finances and spending patterns. If you notice large amounts of income in one category ask the family if they have ever looked into cutting costs. For example, if they state they have a $300 phone bill, talk to them about reviewing their plan and changing it according to their needs. Or if you see that a couple with no children is living in military housing talk to them about possibly looking out in town for an apartment that might be cheaper than their entire Basic Allowance for Housing (BAH). Or if they are living in town and are paying more in utilities and rent than their BAH talk to them about considering moving into military housing. Sometimes, the mere suggestion of analyzing their spending and cutting costs in certain areas is more helpful than any other type of assistance we might be able to provide.

14. Monthly Family Income: Please have the client obtain this information from their Leave and Earning Statement (LES).
   a. Most Service Members should receive Basic Pay; Basic Allowance for Substance (BAS) and Basic Allowance for Housing (BAH).
   b. Please have the family include BAH even if they are living in military housing. It will be deducted in the expense section.
      i. If family is deployed, ask about deployment pays. If they have been deployed longer than 30 days they should be receiving all deployment pays eligible to them, if they are not, advise the Service Member to talk to their command.
      ii. If the Service Member is not deployed but the family states they are still getting deployment pays, advise the Service Member to speak to their command immediately to fix the pay issue so they do not get it taken back at a later date.
   c. Ask the family about non-military income; such as spouse’s income, child support, income from a second job, social security, etc.
   d. Please ensure that the income total is correct on certification tab.

15. Monthly Expenses: Please go item by item with client. Monthly expenses are to include only regular monthly expenses and not past due amounts. If the family has a bill they pay every 6 months divide that total by six and input only what it would be if they paid it monthly. Past due amounts should be included in the explanation section. (Refer to Debt/Expense Worksheet as a guideline. CSR Appendix).
a. If a family lives in military housing they do not have utilities (gas, electric, water). If the family lives in military housing they do pay rent to the housing complex so please make sure to input the amount they pay.

b. Under section titled “Federal and State taxes” add together the Federal, State, Medicare, Social Security Tax Payments and Life Insurance Payments (i.e., SGLI, from the LES).

c. Please compare food costs with USDA food chart (http://www.cnpp.usda.gov/USDAFoodCost-Home.htm); amount may be lower if family receives assistance from agencies such as WIC. If this applies please indicate on journal entry.

d. If the client states they have childcare costs but do not have a second income, please note in the journal entry why they require childcare. For example, “Family has childcare costs because spouse is in school full time.”

e. If the Service Member is getting part of the BAS taken back because of deployment, or sea duty, please include in “Deployed Member Expenses.”

f. Please ensure that there is a dollar amount in clothing and in miscellaneous. We are trying to get an accurate picture of the family’s financial situation. And it is unrealistic to expect a family not spend money on miscellaneous items, such as, school lunches, stamps, uniform dry-cleaning, haircuts, etc.

g. Please ensure the expense total is correct on the certification page.

16. Creditor Payments: Please have client list ALL creditors to include but not limited to credit cards, payday loans, personal loans, car loans, TSP, student loans, and any other monthly bills/payments the client pays that is not included in any other section. (Refer to Debt/Income Worksheet - CSR Appendix).

a. Please have client fill out regular MINIMUM amount due each month.

b. If client has a mortgage that will go under monthly expenses not creditor payments.

c. Please ensure debt total is correct on certification page.

17. The application should list ALL vehicles the family owns (including motorcycles, RVs). If a vehicle listed is not in working order please note that in journal entry. If a vehicle is in the spouse’s name and not the Service Member’s name it still needs to be listed.
When the Case is Ready to be Reviewed:

Once the application is complete, you will need to email the Director of Client Services that the case is ready to be reviewed. Please refer to the Standard Operating Procedures and be sure to include the following information in your email evaluation:

1. What is the client requesting?
2. What is their situation? (List Quotes for goods/services and Income and Expense Report if applicable).
3. What is your recommendation based on the facts?

Example Email to the Director of Client Services:

SUBJECT: MAFA # 1234: JOHN DOE – READY FOR YOUR REVIEW

Hello,

MAFA # 1234: JOHN DOE is ready for your review.

At first, he requested car repair assistance for his 2005 Chevy Malibu. He says that they have that taken care of so now he is requesting food and gas assistance.

I reviewed their expenses and debts. Refer to the journal entries entered in MAFA. Here is a quick summary:

Discretionary Allotment: $1,000 is for his daughter’s school; balance is unknown
Bank Account Allotment: $275/month; balance is $1,100
2005 Chevy Malibu Auto Loan: $225/month; balance is $6,000
Furniture Rental: $584/month; balance is unknown
Student Loan: $400/month; balance is unknown
Child Care Expenses: $450/month

The family’s calculated income is NEGATIVE $623.32.

His spouse is employed, although she is unable to drive to work as she was in a car accident in January and cannot walk.

My recommendation is to provide them with food and gas assistance.

Thank you,
Jane Doe
Client Services Representative
WORKING IN THE MAFA SYSTEM

1. Log into the system by navigating onto either of the following URL’s:
   a. http://mafa.operationhomefront.net/
   b. http://www.operationhomefront.net/socal/
2. Click on the “ONLINE APPLICATION” button.

Landing Page:

   a. Enter your credentials in the area that shows in the lower left corner of the content box. Note the existing content states that this area is for clients to access an existing application, however this is also where administrative users login to manage the applications in the queue.

   b. Your user credentials are as follows: firstname.lastname [john.doe] and your network password [provided by the Director of Client Services]. *NOTE: There are several different levels of permissions and based on a person’s role within the organization they may have limited access; or they may have full access to the system. Consult with the Director of Client Services if you have questions regarding these restrictions.
The Navigational Menu will be shown alongside your Case Browser on the left side of the main content area. This is where you can select the different areas of the case, which you can go directly to in order to manage the case details.

- If you need to add or edit any information, simply click on any of these links to go directly to that area.
- After you have made your required changes or added new information, simply click on another tab on the left navigation menu to save the changes and exit out of the current window. Or you may select “Next” from the lower right corner to move to the next item.
4.
   a. Enter the Service Member’s Information – Branch of Service, Deployment Status (if applicable), Wounded Warrior (if applicable).
   b. Check the appropriate box indicating the type of assistance that the family is requesting.

5.
   a. Enter the contact information for the person filling out the application and their relationship to the Service Member.
   b. How were they referred to Operation Homefront Southern California?
6.

a. Enter the dollar amount that the family is requesting.

b. Ask the family how much they can contribute.

c. Please describe (be specific) the type of assistance they are requesting and what their situation is. Example: Due to the unexpected death of my father, we assisted my family with funeral costs. As a result we were unable to pay for our electricity bill for a couple of months. The electric company has informed us that we have to pay our bill in full by Friday or our service will be disconnected. We owe $460 for our electricity bill and we are unable to pay it in full. We can contribute $50 towards the cost of the electricity bill at this time.
7. Fill in Service Member’s Information. (Pay Grade can be obtained from the Leave and Earnings Statement).

8. Complete one entry for each member of the Service Member’s family, including the Service Member.
9. Fill in the Monthly Family Expenses (Refer to Debt/Expense Worksheet – CSR Appendix). Do not include payments made to creditors. That will be filled out on the next page.

10. Fill in Monthly Payments to Creditors (such as credit card companies, school loans, auto loans, payday loans, etc. Refer to Debt/Expense Worksheet – CSR Appendix).
11. Enter information for each family vehicle, including motorcycles.

12. Enter the family savings information. Include all accounts combined.

13. List any family assets including properties, investments, etc.
14. Upload documents, such as scanned copies of the Service Member's military ID card, Leave and Earnings Statement (LES), Deployment Orders (if applicable) and/or other documents requested depending on case specifics (i.e. Valid Driver’s License, Vehicle Registration, Vehicle Insurance, etc.)

Note: Clients and Client Services Representatives can add attachments to the case.
15. After entering the Family's Monthly Income and Expenses, the system will auto calculate their monthly net income. The number will either show expendable income available or a negative variance. This positive or negative net income should be indicated in the case report email sent to the Director of Client Services for review.

**Case Browser:**

- Upon successful login, you will be directed to the **Case Browser** where you can begin to manage and access your open cases.
- Inquiries are generated when a client requests to speak to someone about their situation from the “Qualify” screen. You will find them in the Case Browser with a 9999 listed as their Last Four SSN. Some inquiries will become full applications. Some will be denied (See Add/Edit Assistance Details).
- To access case details, simply select the case that you want to manage and click anywhere on the case listing, and it will direct you to the **Case Detail** page.

**Managing Case Details**
After selecting your case you will be directed to the Case Detail area where you can begin managing certain items related to your case. Currently, Assistance Items can only be added by the Director of Client Services. Journal Items can and should be made to track any activities that have occurred pertaining to the case, such as conversations or emails that have been exchanged between your team and the client.

Add/Edit Journal Item

- Journal Items are to be used for all notes pertaining to a case and should include all contact attempts.

- To create a new Journal Entry, select the button “Add Journal Item” located in the Case Detail area under the Journal Detail listing window.
- NOTE: Journal entries should be made after the client interview even though the client withdraws or abandons the inquiry. Please ask the Director of Client Services to close the case without listing any assistance. Clients should always be encouraged to complete the application, even if MAFA indicates they may not qualify.

- A new window will appear where you can add your case notes. To save your new journal item select “Submit Entry”. The Alert function [lower right corner of the Journal Entry window] allows us to permanently flag a client that has been abusive, dishonest, or fraudulent. The Alert function will only be used by the Director of Client Services and be approved by the Chapter President.
Inquiries/Contacts

- MAFA is designed to qualify the clients. If they request to speak to someone, a record will appear in the chapter’s case browser. Add notes to the journal to record case/client information just as if it was a full application. If the client withdraws or abandons the inquiry, please ask the Director of Client Services to close the case without listing any assistance. Clients should always be encouraged to complete the application, even if MAFA indicates they may not qualify. This indication is machine generated and does not take into account the ability of the Chapter to take into account extenuating circumstances that may warrant a recommendation for exception to policy.
- If you choose to abbreviate in your typed case notes, use the Standardized Abbreviations List. (CSR Appendix 4).

Close a Case:

- Once a case or inquiry is completed or otherwise attended to in a satisfactory manner; the Director of Client Services will close the case.
- *NOTE: CSR’s cannot close a case. Only the Director of Client Services, Director of Operations, or Chapter President can close cases. If a CSR feels a case should be closed, he/she should make the recommendation to the Director of Client Services.
Assisting the Family by Providing Screening and Recommendations:

Financial Planning Classes:
Operation Homefront Southern California provides periodic financial planning classes to current clients and any active duty Service Members and their families. Discuss the class with every client that completes an application.

Operation Homefront Southern California has partnered with the experts from the Financial Planning Association (FPA), an association with over 400 members, and as Certified Financial Planners™ they are offering FREE financial planning classes for Service Members and their families.

There are two classes available - “Back to the Basics” and “Advanced Planning.” “Back to the Basics” class is a class setting with a general overview of controlling spending, reducing spending, increasing savings, managing credit, etc. The “Advanced Planning” is a one-time, one-on-one session with a planner to discuss in depth spending, savings, and investment plans for the family. Each class/session is a non-solicitous engagement with no follow-up contact by the advisor.

The client will receive all the tools and knowledge to build a tougher, better looking, financially planned military family. The sessions are valued at over $1,000 if the client were to consult with a certified financial planner out in town.

Classes are scheduled in various locations, including the Operation Homefront Southern California office near MCAS Miramar. Childcare is provided upon request. To register for a class email socal@operationhomefront.net and indicate which type of class is of interest to you.

Providing Sound Advice Using Operation Homefront Southern California Financial Guidelines:
For some families this is the first time they may be reviewing their finances and spending patterns. If you notice large amounts of income in one category, ask the family if they have ever looked into cutting costs. For example, if they state they have a $300 phone bill, talk to them about reviewing their plan and changing it according to their needs. Or if you see that a couple with no children is living in military housing talk to them about possibly looking out in town for an apartment that might be cheaper than their entire Basic Allowance for Housing (BAH). Or if they are living in town and are paying more in utilities and rent than their BAH, talk to them about considering moving into military housing. Sometimes, the mere suggestion of analyzing their spending and cutting costs in certain areas is more helpful than any other type of assistance we might be able to provide.

For example, you may see an applicant who spends a lot of money on baby clothing each month and may not know that we have a warehouse with baby clothing and they can ask for assistance
with this. There are also children’s stores around the County that buy, sell, and trade clothing at a reduced price. You can also suggest that they call their creditor and ask for a reduced APR on their credit card bills or call their car loan agency and ask for a reduced car payment or to skip a payment for one month. They may need to cut back on spending money on certain items each month and you can suggest it but do not judge them or tell them that they have to do it in order to receive assistance. You basically want to review their spending with them and make suggestions of where they can cut back.

**Referrals to Other Agencies:**
Although we strive to provide all the services to families that they might need, there may be other organizations that provide a specific service that we do not, or might be able to help in conjunction with Operation Homefront Southern California. Please refer to the resource list to refer clients to other agencies and/or programs. Sometimes, in the decision process the Director of Client Services might notify you of specific agencies to refer the client. However, feel free to use the Resource list as well. If you find any resources that are not on the list, please forward them to the Director of Client Services for review as a possible addition to the resource list.
The Decision Process

Clients who apply for assistance are usually in crises and are in need of immediate assistance. **It is our goal to have a decision to the client within 24 to 48 hours** once the Director of Client Services has received the application.

- All applications submitted require at least a two-person approval or denial. The CSR is not to be the decision maker under any circumstances. However, a recommendation from the CSR is encouraged and taken into consideration. The CSR should take the opportunity to send their comments and recommendations to the Director of Client Services and include all pertinent information that will be helpful in deciding assistance.

- Requests for assistance in the amounts of more than $2,000 or those that are outside the SOPs requires the approval/denial from the Granting Committee of the Board of Directors. When a case goes to the Granting Committee, a decision may not be reached within the 24 to 48 hours due to the number of people involved in making the decision. The CSR will be notified if the decision will take longer than 48 hours.

- Client history is checked because we want to ensure that our clients are not becoming dependent on our assistance. Clients are only authorized assistance once in a quarter (every three months). If a client has been assisted twice (in their lifetime) they are required to attend a financial planning class before a subsequent request will be considered. Although the majority of our clients are in genuine need there are people who abuse the system and these clients are flagged and are not eligible for future assistance.

- The Director of Client Services will either 1) ask CSR to follow up with questions or 2) forward the application to be reviewed by a second person. If the application is to be considered for an exception or requires resources in excess of $2,000, it will be forwarded to the Granting Committee for consideration.

- Once a decision is made, the Director of Client Services will inform the CSR by email to maintain a written record of the decision, request the required documentation and/or give referral information, if necessary. The CSR may give relevant referrals before a decision is made. All supporting documents must be uploaded into MAFA or faxed to 858-695-6845. Because of security and confidentiality reasons, at no time should the documents be scanned and sent to the CSR.

- When emailing the decision to the family, erase the contact information and original staff comments. Sometimes clients are not happy with a decision that has been made. If they obtain the review board’s information they may bypass the CSR and go directly to other members of the staff. This leads to delays and often confusion for all of the cases.
• If documentation is not received within a week, the CSR should follow up with a 2nd request for documents. The case will close if there is no response after three requests.

• The Director of Client Services will notify the CSR when the documents have been received. The CSR will also be notified when approved assistance will be given (i.e. if assistance is to be mailed such as gift cards for food). The CSR will be notified when it will be mailed. At this point the case is closed for the CSR.

• For clients approved to go to the warehouse, a volunteer warehouse manager or member of the staff will be notified of what items the clients are approved to receive from the warehouse as well as client contact information. Clients will be contacted directly to schedule an appointment to go to the warehouse. Typically the warehouse is only open once a week.

• Any client who is denied assistance has the option to ask for an appeal. The first level of appeal is to the Chapter President. The client can do this by writing a letter of appeal with any additional information to plead their case. The Chapter President will review the appeal letter and make a determination. The Director of Client Services will communicate this determination, including the reason(s), to the client. If dissatisfied, the client may then make submit a final appeal via the Chapter President to the Granting Committee. Said appeal must be in writing and provide a full explanation. The final appeal will be endorsed by the Chapter President and forwarded to the Granting Committee of the Board of Directors for final decision. The decision of the Granting Committee is the final action, with no further appeal possible.

• **Exceptions.** There may be cases in which the CSR recommends, the staff endorses, and the Chapter President approves recommending an exception to policy. This is a rare circumstance and must be based on absolutely compelling information and evidence. When considering recommending an exception, the CSR must keep in mind that every exception both establishes a precedent and potentially takes resources that could be used in the future to satisfy an application that does fall within policy and protocol.
  
  o If considering an exception, the CSR must provide full written justification for the recommendation. It is crucial that the CSR not inform the client that an exception is being considered, because doing so can create a false sense of expectation for the client.
  
  o A recommendation for exception requires a positive endorsement by the Director of Client Services and Director of Operations to be forwarded to the Chapter President for consideration.
  
  o If the Chapter President approves the recommendation, it will then be sent to the Granting Committee by the Director of Client Services for final action. There is no appeal for any element of or step in the exception process.
  
  o Should an exception be made, the CSR is responsible for notifying the client that an exception was made, the rationale for the exception, and that other chapters are not bound by the exception. The Director of Client Services is responsible for entering the exception into MAFA for records purposes.
  
  o Finally, exceptions are pursued only in the most compelling of situations and will be viewed as extraordinary.
TIPS FOR EXPEDITING THE DECISION-MAKING PROCESS:

- When requesting quotes from clients such as estimates for eyeglasses, auto repairs or home repairs, please give the client a deadline of one week to get back with you with proper documentation. This will speed up the process and if in fact this is an emergency for the family, they will likely get it to you quickly anyway.
- If the client has been requested to attend a financial planning class before we can assist them, please give them a deadline of two weeks to complete the class; otherwise, we will close the case.
Programs and Standard Operating Procedures

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Appliance Repair

The Appliance Repair Program is here to assist families of deployed or injured Service Members with unexpected appliance issues. Assistance may be in the form of pro-bono donated services, discounted services, referral or Operation Homefront Southern California financial grants to pay for repairs of the following:

- Air Conditioning
- Hot Water Heater
- Refrigerator
- Stove
- Washer/Dryer

To better assist families that are in need of an appliance repair please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our appliance repair program:
   a. Program is only open to deployed or injured Service Members in financial need.
   b. Operation Homefront Southern California does not offer assistance in the following areas:
      - Repairs to appliances owned by landlords or those which are included in military housing
      - Appliance purchases
      - Rental appliance repairs
   c. If repair is not possible or if it’s too costly the family, they may be placed on the donated furniture list.

2. Please assist the client and electronically fill out the entire application and state why they are in need of an appliance repair including, make & model of appliance, age of appliance, and symptoms. If the client has been approved for the appliance repair the client will be required to provide a copy of their military ID, and LES and
an estimate may be required if Operation Homefront Southern California does not have a service provider to whom the family may be referred.

3. If the client has been denied the repair but is being placed on the donated furniture waitlist the client will still be required to provide a, military ID, and LES (Refer to the Furniture Program Guidelines for further instructions).
Car Repair
Operation Homefront Southern California is able to assist families of deployed or injured Service Members with car repair issues when their only vehicle has broken down. Assistance may be in the form of pro-bono donated services, discounted services, referral or Operation Homefront Southern California financial grants to pay for:

- Towing services (not emergency towing but towing to the mechanic)
- Diagnostic services
- Repair Services

To better assist families that are in need of vehicle repair, adhere to the following guidelines:

1. When you first contact a military family, please let them know the following about our car repair program:
   a. To qualify Service Member must be deployed or injured.
   b. It must be the only means of transportation for the family.
   c. The vehicle must be registered to the Service Member or spouse.
   d. The vehicle must be currently insured.
   e. The applicant must have a valid driver’s license.
   f. If we approve the car repair we will contact the mechanic and make arrangements for payment and authorize repair. If the client calls the mechanic and approves the repair, Operation Homefront Southern California is not obligated to pay for the repair.
   g. Operation Homefront Southern California does not offer automobile assistance in the following areas:
      • Routine maintenance (tires, brakes, oil changes, tire rotation, tune-ups)
      • Repair of modified or vintage vehicles
      • Second vehicle repairs
   h. Value of vehicle must be greater than the cost of the repair in order for us to authorize the repair.

2. If the family does not qualify as stated above, they are still able to apply for special consideration, however please inform them of the normal guidelines and it will be reviewed on a case-by-case basis. Refer to the section on Exceptions.
3. Please assist the client and electronically fill out the entire application and state why they are in need of a vehicle repair. Please ensure their application includes the following:
   a. Make/Model/Year of Vehicle
   b. # of vehicles (even if they don’t work, don’t fit the children, motorcycle, RV, etc.)
   c. Location of Vehicle
   d. Vehicle drivable or not drivable
   e. Symptoms/Problem
   f. Dollar Amount client can contribute towards the repair

4. If vehicle is not approved for repair Operation Homefront Southern California may:
   • Tow vehicle back to client’s home, if needed
   • Refer to other non-profit agencies but ensure they have the ability to assist first
   • Refer to community partners for financing or purchase options
   • Refer to service providers

5. If the vehicle has been approved for the vehicle repair program the client will be required to provide a copy of their military ID, valid driver’s license, current vehicle registration, insurance declaration page, estimate (if they have one already) and LES. Insurance declaration page lists all coverages, drivers and vehicles. We reserve the right to contact the insurance company to verify vehicles. Client needs to contact the insurance company to authorize a representative from Operation Homefront to contact and verify coverage status.

6. Once all of the documentation has been received, the CSR assisting with the application will notify the client that all of the documents are received and give them the name of the repair facility to take the vehicle. If the client is already working with a mechanic, the Director of Client Services will contact the mechanic to discuss discounts.

7. Work will not start until the mechanic receives authorization from the Director of Client Services, Director of Operations, or Chapter President. If the clients authorize services on their own, Operation Homefront Southern California is not responsible for the payment. Some authorizations will have a maximum payment amount and if costs exceed that amount the client will be responsible for the amount above the authorized limit. If this is the case, the client will be told of the maximum payment amount ahead of time.

8. Once authorization has been given to the mechanic from the Director of Client Services, the mechanic will commence work.

9. Mechanic will notify the client when the repair has been completed.

10. Operation Homefront Southern California will pay the mechanic directly after the work has been completed. In no case will funds be provided to the client.
**Computer/Communications**

Through the kind donations of the community we are able to provide refurbished computers for military families. Because the items are coming from the community we don’t have control of when we will get computers in and when the need for the family will be fulfilled. We will do our best to assist all families but we are not able to guarantee assistance at the time of need.

To better assist families that are in need of a computer please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our computer program:
   a. We provide refurbished desktop computers from the community that are a minimum speed of Pentium IV for families back at home to communicate with their deployed spouses/parents.
   b. Priority on the waitlist is given to families in the greatest need (i.e. injured, currently deployed, etc.)
   c. To be placed on the waitlist, a client must be within 3 months of deployment and/or currently experiencing a deployment. Client must be E6 and below, military dependant or active duty military. Parents, siblings, etc. do not qualify.
   d. Laptops are donated. An exception is if the client is an injured Service Member who has been approved and will receive from the military the CAP Program. They may be eligible for a laptop. (CAP is the Computer/Electronic Accommodations Program to provide assistive technology and services to people with disability to modify the computer for their communication needs. The military will provide this to the Service Member if it is needed for communication due to disability but is not always able to provide the laptop to install it on.)
   e. If the client does not qualify per the above guidelines, they can still apply for a computer but are required to fill out the entire application including financial information.
   f. The client must be able to pick up the computer from a designated pick up area. We are unable to ship computers. If the client is not able to pick up the computer they can have a friend or relative pick it up only if the friend has a photocopy of the client’s ID card when they pick it up and Operation Homefront Southern California has prior written permission from the client.
2. Please have the client state why they are in need of a computer and indicate deployment date and/or expected deployment date. Fax a copy of the signed application, ID and LES. If the family qualifies under section (c) above, they automatically qualify for the computer waitlist. Once all of the documentation has been received, the volunteer assisting with the application will notify the client that all of the documents are received and inform them that their information will now be placed on the computer waitlist. The Director of Client Services will contact the client once we have a computer available. We cannot definitively state the wait time on the waitlist, as it is dependent on the donations from the community.

3. If we make multiple attempts (three calls) to contact the client when the computer becomes available or to update our waitlist or if the client doesn't show up for appointment set to pick up a computer without notice, the client will be removed from the waitlist.

Please understand that it is our sincere hope to assist all families with all needs but due to the limitations of the program it is not always possible.
Donated Vehicle

Through the kind donations of the community we are able to provide donated vehicles for military families who have no means of transportation. Because the vehicles are coming from the community we don’t have control of when we will get vehicles in and when the need for the family will be fulfilled. We will do our best to assist all families but we are not able to guarantee assistance at the time of need.

To better assist families that are in need of a vehicle please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our donated vehicle program:
   a. We provide donated vehicles of all ages, makes and models. Each vehicle receives a thorough inspection and all known mechanical and safety features are fixed. Cosmetic fixes such as paint and air conditioning will not be fixed prior to giving the vehicle to the family.
   b. Priority on the waitlist is given to families in the greatest need.
   c. To be placed on the waitlist, a client must be in considerable financial need and fit one of the below qualifications:
      i. Owns no vehicle at all
      ii. Current vehicle needs repairs that are worth more than the cost of the vehicle and/or the client can’t afford to fix their current vehicle
      iii. Current vehicle does not fit the entire family (example 2 door truck and twins on the way).
   d. CSR recommendations for exceptions will be processed in accordance with established exception procedures.
   e. If the family has the funds available to sustain a monthly car payment they will not be placed on the waitlist and referred to a reputable car dealership.

2. Please assist the client and electronically fill out the entire application and state why they are in need of a vehicle. Once the decision has been made, relay to the client the decision.

3. If the client has been approved for the donated vehicle waitlist have they will be required to provide a copy of their military ID, valid driver’s license and LES.
4. Once all of the documentation has been received the volunteer assisting with the application will notify the client that all of the documents are received and inform them that their information will now be transferred to the Director of Client Services. The Director of Client Services will contact the client to let them know they have their information on the waitlist and the current status of the waitlist. The Director of Client Services will also be the one to contact the client once we have a vehicle available. At this point the client’s involvement with the CSR will end.

5. We cannot definitively state the wait time on the waitlist, as it is dependent on the donations from the community.

6. When a vehicle is available for a client, the client is responsible for attaining insurance on the vehicle prior to transfer. We will provide the VIN and the license number so the client can arrange for the start up of the insurance coverage.

7. The client must be able to pick up the vehicle from wherever it is currently stored.

8. The client will be given the transfer of ownership forms and must register the vehicle within 72 hours or receipt. Client is responsible for DMV transfer fees, smog certificates and insurance costs.

9. Client must agree that they will not sell, transfer, or give the vehicle to anyone without consent of Operation Homefront Southern California as stated on the “Vehicle Acceptance Form.”

10. If we make multiple attempts (three calls) to contact the client when the vehicle becomes available or to update our waitlist or if the client doesn’t show up for appointment set to pick up a vehicle without notice the client will be removed from the waitlist.

Please understand that it is our sincere hope to assist all families with all needs but due to the limitations of the program it is not always possible.
Emergency Financial Assistance

Operation Homefront Southern California provides emergency financial assistance to military families experiencing devastating budget issues during deployment and injury recovery. Exceptions to this are at the discretion of the Granting Committee based on knowledge, experience, extenuating circumstances and client necessity. Payments are made by Operation Homefront Southern California directly to the creditor/vendor/repair facility/landlord. Families are never given any monetary directly payable to them.

To better assist families that are in need of an emergency financial assistance please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our program:
   a. Service Member needs to be deployed or injured and the family is experiencing devastating budget issues.
   b. Guidelines on types of financial assistance we can provide include:
      • Shelter – rent (if in eviction process), mortgage (if in foreclosure), utilities (if being shut off), or emergency temporary lodging. If approved, the client must show proof of eviction, foreclosure and utility disconnections.
      • Vehicle Expenses – car payments if in repossession status (only when it is the family’s only means of transportation and vehicle must be registered in the Service Member’s or spouse’s name). If approved client must show proof of registration, valid driver’s license, and insurance declaration page and verification of payment.
      • Airfare to transport a family member to assist a military family during illness or for childbirth during deployment or for bereavement when involving immediate family members (mom, dad, brother, sister, wife, child).
      • Childcare during illness or surgery when spouse is deployed.
      • Funeral and/or cremation expenses for military children not covered by Family SGLI.
      • Personal Property Taxes (if property will be taken away if not paid)
      • Urgent Medical/Dental – at chapter discretion
   c. We do not offer financial assistance with:
      • Airfare for vacations, R&R or to meet deployed Service Members in foreign ports
d. All bills that the client is requesting assistance with must be in the client’s name.

e. Client must have already tried to negotiate payment terms with the creditor before we will approve. We may require proof that they have tried to negotiate before approval.

f. Clients are expected to put some funds towards the bill, whenever possible.

2. Please assist the client and electronically fill out the entire application and state why they are in need of a financial assistance. List in the general section the total dollar amounts requested for each item. Example, if the client needs help with eviction and utility they should include in the description “$1,500 for 2 months rent and $350 for electricity for 3 months past due.”

3. Once the decision has been made, relay the decision to the client.

4. If the client has been approved for the emergency financial program, the client will be required to provide a copy of their military ID, LES and all supporting documentation including bills indicating the past due amounts.

5. Once all of the documentation has been received the CSR assisting with the application will notify the client that all of the documents are received.

6. Payment will be sent directly to the creditor. If the client has not been notified that payment has been made from their creditor, the client should contact the CSR to ask for status. The CSR will contact the Director of Client Services to check on the status. If the client calls the office they will be directed back to the CSR.

7. If the client is receiving assistance with airfare, the Director of Client Services will make all of the travel arrangements. The client will need to tell the volunteer the beginning and end cities and the Director of Client Services will find the most cost effective airports to fly in and out of. It may not be the closest to the ending point but will be a reasonable distance. The client cannot be reimbursed for tickets already purchased.

8. Clients should be given financial resources such as the Fleet and Family Support Center (Navy), Marine Corps Community Services, Army Community Services In-Charge Credit Counseling (free to military families 888-794-6389). Financial Counseling is available through USAA.COM (Service Members just need to register on the website to access services). These resources are provided to assist the military family in recovering from the financial crisis and preventing future crises.
Emergency Food

Operation Homefront Southern California is able to assist families during difficult times with food boxes (including diapers and formula if needed) and gift certificates that enable them to manage their food crisis until the next pay period. The food assistance program is designed to be a temporary measure, not a long-term solution to chronic financial problems.

To better assist families that are in need of emergency food please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our emergency food program: Service Member does not need to be deployed.

2. Please assist the client and electronically fill out the entire application and state why they are in need of a food. If the family is not near a commissary, please state this on the application as well as they will need food vouchers for a grocery store close to them (this is sometimes the case for reservist, guardsmen, or discharged injured Service Members). Once the decision has been made, relay the decision to the client.

3. If the client has been approved for the emergency food program they will be required to provide a copy of their military ID, and LES.

4. Once all of the documentation has been received the CSR assisting with the application will notify the client that all of the documents are received.

5. If approved for the food gift certificate, the gift certificate will be mailed to the client, unless other arrangements have been made prior to the documents being received.

6. The food gift certificate amount will not be told to the CSR and therefore cannot be relayed to the client prior to their receipt. The value of the food gift certificate will depend on family size and extenuating circumstances.

7. The client will receive a list of other food resources in the community when they receive the food gift certificate.

8. If the client has been approved for the warehouse for diapers or formula, the client’s contact information will be sent to the appropriate warehouse manager to call the client to set up an appointment for the next day the warehouse is open.

9. If the client has not received the food voucher or been contacted by the warehouse volunteer within a few days of the notification of the documents being received,
direct the client to contact you (the CSR) to inquire as to the status. At which time, email the Director of Client Services to ask about the status. Do not direct the client to contact the Director of Client Services or the office to ask about the status. They will be directed back to the CSR they were working with originally.

10. If the warehouse volunteer makes multiple attempts (three calls) to contact the client to set up an appointment to visit the warehouse or if the client doesn’t show up for an appointment, that portion of the case will be closed.
Furniture/Household/Baby Items Program

Through the kind donations of the community we are able to provide gently used furniture for military families. Seeing as though the items are coming from the community we don’t have control of when we will get items in and when the need for the family will be fulfilled. We will do our best to assist all families with the items they need but we are not able to guarantee assistance at the time of need.

To better assist families that are in need of furniture please follow the following guidelines when speaking with them:

1. When you first contact a military family, please let them know the following about our furniture program:
   a. The items we provide are used items donated from the community
   b. Priority on the waitlist is given to families in the greatest need (i.e. injured, family emergency, etc.)
   c. Families who are able to arrange their own pick up of the furniture directly from the donor or our warehouse will speed up their placement on the waitlist
   d. We do not give out stuffed furniture or mattresses for health reasons as we cannot guarantee their cleanliness
   e. Some items such as washers & dryers are very rarely donated and the waitlist is quite long
   f. Each item has a different wait time on our waitlist and we can’t speculate on the amount of time you will be waiting. The client may receive notification that we have one of the items they requested but not all at one time.
   g. We do not accept special requests for color, shape, etc. of the items from the families. We try to accommodate size requests.

2. Please list specifically all the items on the application that the client is in need of and indicate if the client can arrange their own pick up of the furniture and have the client provide a copy of their military ID and LES. As long as the family is E6
pay grade and below they automatically qualify for the furniture waitlist without providing information regarding income and expenses.

3. Once all of the documentation is received, the CSR will notify the client. The volunteer in charge of the furniture program will then contact the client once we have one of the items on their requested list.

4. If the furniture program volunteer makes multiple attempts (three calls) to contact the client when an item becomes available, or if the client doesn’t show up for appointments set with the donor or the volunteer without notice, the client will be removed from the waitlist.

Please understand that it is our sincere hope to assist all families with all needs but due to the limitations of the program it is not always possible.

Military Outreach Ministries also has a furniture donation program at the following numbers: Camp Pendleton: (760) 908-7043 & San Diego: (619) 461-4164
Home Repair

Operation Homefront Southern California will assist families of deployed or injured Service Members with unexpected home repairs not covered by home insurance or home warranty. Assistance may be in the form of pro-bono donated services, discounted services, referrals or financial grants to pay for the following:

- Electrical Issues
- General handyman repairs
- General Appliance Repair (see Appliance Repair Guidelines)
- Heating & Air Conditioning
- Pest control
- Plumbing
- Retrofitting for accessibility
- Roofing

To better assist families that are in need of a home repair please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our home repair program:
   a. Program is only open to deployed or injured Service Members in financial need.
   b. Operation Homefront Southern California does not offer assistance in the following areas:
      • Repairs to rental units or military housing
      • Home purchases
      • Service Member owned rental property repairs
      • Second properties.
   c. Client must contact the insurance carrier to see if the issue is covered by the homeowner's insurance and will need to provide proof of non-coverage for issue.
   d. Operation Homefront Southern California will be the one to coordinate the services if approved.

2. Please assist the client and electronically fill out the entire application and state why they are in need of a home repair including the nature of the problem and
whether they own the home and if it is a single family home, condominium, mobile home, etc. Once the decision has been made, relay to the client the decision.

3. If the client has been approved for the home repair, the client will be required to provide a copy of their military ID, LES, and proof of home ownership (property deed).

4. Once all of the documentation has been received the CSR assisting with the application will notify the client that all of the documents are received and inform them that their information will now be transferred to the Director of Client Services. At this point the client’s involvement with the original CSR will end. The Director of Client Services will contact the client to let them know they have their information and continue with the repair process with the client.
Moving Assistance

Through the support of volunteers within the community we are able to supply the physical labor or moving company to families with deployed or injured Service Members with local non-PCS moves and includes the following:

- Moving to new/larger quarters.
- Moving items in/out of storage units upon deployment or return from deployment.
- Moving from civilian units into military housing.
- Loading and unloading trucks locally

To better assist families that are in need of a moving assistance please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our moving assistance program:
   a. Service Member must be deployed/preparing to deploy in the very near term or injured for the family to qualify for moving assistance.
   b. We provide the physical labor of loading and unloading trucks only. We do not pack or unpack boxes. The labor is primarily limited to volunteer assistance.
   c. We do not assist with non-local moves but may be able to assist with loading or unloading the moving truck locally.
   d. We need a minimum of two weeks to plan a move. We will do our best to coordinate volunteers but there might be instances where we are not able to assist.
   e. The family must be in considerable financial need in order to qualify for moving assistance. If the family can afford to pay for a mover we will refer them to a service provider that we work with.
   f. Operation Homefront Southern California is not responsible for lost, stolen or damaged belongings. Clients must sign a general release before work can begin.
   g. The client is typically responsible for renting a truck for the move.
2. Please assist the client and electronically fill out the entire application and state why they are in need of a moving assistance. Ask the following questions and note answers as a journal entry.
   - Moving Phone?
   - New & Old Address?
   - New Phone # if known?
   - Is the date and time for this move firm?
   - Number of bedrooms?
   - Any appliances?
   - Any particularly large items?
   - 1st floor/2nd floor?
   - Has a truck been booked for this move?
   - Client contribution towards move?

3. Once the decision has been made, relay the decision to the client.

4. If the client has been approved for the move, the client will be required to provide a copy of their military ID, Release of Liability and LES.

5. Once all of the documentation has been received the CSR assisting with the application will notify the client that all of the documents are received and inform them that their information will now be transferred to the Director of Client Services. The Director of Client Services will contact the client to verify all the move details and coordinate volunteers. At this point the client’s involvement with the CSR will end and all future involvement regarding the move will be from the Director of Client Services.

Please understand that it is our sincere hope to assist all families with all needs but due to the limitations of the program it is not always possible.
Vision Care

To better assist families that are in need of eyeglasses please follow the guidelines below:

1. When you first contact a military family, please let them know the following about our vision care program:
   a. Service Member does not need to be deployed.
   b. Active duty members do not qualify – no exceptions.
   c. Does not include assistance with contacts unless client can provide a letter from a doctor indicating medical necessity.
   d. We do not assist with extra nonessential additions to the prescription such as transitions, anti-reflective coating, warranties, featherweights, etc.

2. Please assist the client and electronically fill out the entire application and state why they are in need of vision care assistance. Forward the electronic draft of the application to the Director of Client Services for a decision. Once the decision has been made, relay the decision to the client.

3. If the client has been approved for vision care assistance, have the client fax a copy of the signed application, military ID, current prescription from an Optometrist, LES as well as two estimates for eyeglasses with a breakdown of costs from the vision care professional.

4. Once all of the documentation has been received, the CSR assisting with the application will notify the client that all of the documents have been received.

5. Payment for the eyeglasses will be sent to the service provider. The client is then responsible for purchasing the eyeglasses from the service provider. In some cases, payment may be sent directly to the service provider and the client will need to contact the service provider to order the eyeglasses. In either case, the client will be told what process will take place.
Service Provider Referral

Operation Homefront Southern California has a group of service providers that it routinely works with on emergency cases. The referral process allows us to give back to the service providers that provide us with tremendous discounts on a daily basis.

Anyone, civilian or military, can request a referral to one of our trusted service providers.

For tracking purposes, please fill out the application for each referral.

Make sure they state they were referred by Operation Homefront Southern California. However, if referred by Operation Homefront Southern California, they are not guaranteed the discount that Operation Homefront Southern California receives. They can be however, assured that they will be treated with respect and will get an honest quote.

Resource Provider List
Please refer to our resource guide for suitable resources for our clients. Inquire with your Director of Client Services.
Special Cases

Family Separation/Domestic Issues Guidelines

While it is the Service Member’s responsibility to support their family, our ultimate goal is to evaluate the situation to determine if assistance is warranted.

Evaluation tools to aid the decision making process:

- Proof that command, Victim’s Advocacy on base, or the applicant has contacted JAG. (Proof can be attained by a letter or verbally speaking with someone from above.)
- If pending divorce, proof of support order, legal hearing or legal separation documentation.
- Are there additional emotional issues involved like Post Traumatic Stress Disorder (PTSD) or combat stress (documentation required)?
- What is the family’s long-term solution?

In urgent cases, the chapter should act swiftly to provide temporary shelter and food only.
Wounded Warrior Overview

Purpose

To provide information to better serve the special needs of our wounded warriors in their transition back to civilian life. Combat related injuries have devastating effects on a military family’s emotional and financial well-being.

Transition is defined as the period between injury and 6 months after all injury related compensation has been awarded/received. Requests received outside this guideline would need granting committee approval.

Understanding Wounded Warrior Compensation

• **Active Duty Military Pay**: If the Service Member (SM) has not been discharged and is currently on medical hold status.

• **VA Disability Compensation**: A permanent monthly payment from the Veterans Administration, based on severity of injury (0-100%) as determined by the VA through medical examinations. VA Disability Compensation does not begin immediately upon active duty discharge could take up to 18 months after discharge to receive first payment. This is not an automatic compensation. The Service Member must apply for VA pay benefits

• **Military Medical Severance Pay**: A lump sum paid upon discharge to compensate the Service Member for their injury. Awarded when military medical rating is less than 30%. Service Members receiving severance pay are considered discharged from the military and not retired, therefore they are not eligible for Tricare for Life, military exchange or commissary privileges. They lose their military ID card. VA Disability compensation will not be paid to the Service Member until the amount exceeds the severance already received. (Example: Service Member receives $20,000 in severance. VA subsequently awards $1000/month to SM. SM will not receive any payments from the VA until the $20,000 has been exceeded in the 21st month).

• **Military Disability Retirement Pay**: Retirement status is awarded when the military rates the disability at 30% or higher. These Service Members are treated like a regular military retirement and are eligible for retirement benefits, which include Tricare for Life, military exchange and Commissary privileges, etc. Military Disability retirement is normally permanent, but in some circumstances may be temporary disability retirement (TDRL). TDRL is normally used when the situation
may improve over a period of 1-5 years. TDRL is most common for those with PTSD, cancer and those awaiting organ transplant. It’s important to know if your clients or on TDRL or are permanently retired. Check the DD214 to verify that information. The CSR must request the LONG copy of the DD214, which includes their character of discharge and their separation reason and codes if they are already discharged.

- **Concurrent Receipt**: Concurrent Receipt means to receive both military retirement benefits and VA disability compensation, and up until 2004 this was forbidden by law. To receive VA disability compensation, disabled military retirees had to waive all or part of their military pay. As of 2004 this law changed so that qualified disabled military retirees will now get paid both their full military retirement pay and their VA disability compensation, however the concurrent receipt ONLY applies to those who served 20 or more years in the military and we rated at a 50% or higher. All other SM’s, which includes most of our clients, will not be eligible for concurrent receipt and will therefore still have to waive their military disability compensation to accept the VA Disability compensation.

- **Incapacitation Pay (Incap)**: A monthly payment for injured guard and reserve members who are expected to recover fully. Pay can sporadic due to periodic reviews.

- **TSGLI**: Traumatic Service Members Group Life Insurance. A one-time disability insurance payment up to $100,000. This payment is intended to assist the military member through transition back to civilian life.

- **Social Security Disability Insurance (SSDI)**: All injured Service Members who cannot return to work should apply for SSDI. SSDI monthly compensation can be received concurrently along with active duty and VA pay.

**Specifics**

These families are in a very emotionally delicate situation. All interactions from the initial call to the final conversation should be handled with the utmost priority, care and patience. Often extra effort will be required on the chapter’s part to ensure quality service for these families.

Many wounded, including traumatic brain injury and Post Traumatic Stress Disorder (PTSD) sufferers, are on multiple medications and suffer short-term memory loss. Please call back frequently and provide ample opportunity to get the information required to process the case. Do not assume they no longer need assistance. Caregivers are often named by the military and put on military orders to assist a severely injured Service Member. Our services are extended to the named caregivers. Caregivers may include the military spouse, a fiancée, or a parent. Our assistance should be to aid ONE caregiver.

Follow up care can and should be managed at chapter’s discretion.

**Qualifications**: Open to Service Members of all ranks sustaining a service connected injury and their families.

**Information Required Prior to Decision Being Made**
1. Signed Application Packet
2. DD214 (long copy) – for those discharged
3. Medical documentation showing injury is service connected
4. VA letter stating a case is pending. Typical VA cases can take 3-18 months
5. VA rating letter (if a rating has been issued)

Suggested Documents:
1. Military rating letter/pay statement (Retiree Account Statement)
2. SSDI letter of determination
3. Any other documentation required for substantiating request

Questions to Ask When Assisting With Application (Please note answers in application):

1. What is your current military status?
2. What pay are you currently receiving?
3. What is the nature of your injury? (Combat, non-combat, indirect combat)
4. When did the injury occur?
5. Have you applied for or have received TSGLI?
6. Do you have a copy of your DD214 (if discharged), med hold orders (if med hold),
7. Do you have an open VA claim?
8. Have you applied for or are you receiving Social Security Insurance?
9. Have you received a military medical disability rating?
10. Have you received a VA medical disability rating?

Follow Up: Clients are given financial resources such as the Fleet and Family Support Center (Navy), Marine Corps Community Services (Marines), Consumer Credit Counseling, etc. to assist them in recovering from the financial crisis and preventing future crises.
CSR APPENDIX

1. CSR Monthly Hours and Call Log
2. Debt/Expense Worksheet
3. Standardized Abbreviations List
4. CSR Volunteer Agreement
# 1. CSR Monthly Hours and Call Log

<table>
<thead>
<tr>
<th>DATE</th>
<th>ACTIVITIES PERFORMED</th>
<th>TOTAL HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/4/10</td>
<td>MAFA #4107: Joe Smith</td>
<td>0.25</td>
</tr>
<tr>
<td>10/5/10</td>
<td>Receptionist</td>
<td>4.75</td>
</tr>
<tr>
<td>10/6/10</td>
<td>Email</td>
<td>0.25</td>
</tr>
<tr>
<td>10/15/10</td>
<td>Receptionist</td>
<td>5</td>
</tr>
<tr>
<td>10/16/10</td>
<td>eTapestry online training</td>
<td>1.25</td>
</tr>
<tr>
<td>10/21/10</td>
<td>eTapestry online training</td>
<td>1.25</td>
</tr>
<tr>
<td>10/31/10</td>
<td>Receptionist</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Install Windows updates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>eTapestry online training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #4107: Joe Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #5091: Anne Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #4107: Joe Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #4874: Howard Johnson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #5091: Anne Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #4107: Joe Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #5091: Anne Smith</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #5254: Jack Johnson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #4874: Howard Johnson</td>
<td></td>
</tr>
<tr>
<td></td>
<td>MAFA #5299: Jane Doe</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL MONTHLY HOURS**: 17.75

**VOLUNTEER SIGNATURE**

**OHSC STAFF SIGNATURE**
**Debt/Expense Worksheet**

2.

<table>
<thead>
<tr>
<th>MONTHLY EXPENSES:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HOUSING:</strong></td>
</tr>
<tr>
<td>Rent/Mortgage</td>
</tr>
<tr>
<td>Home/Rent Insurance</td>
</tr>
<tr>
<td>Electricity</td>
</tr>
<tr>
<td>Heating Fuel/Natural Gas</td>
</tr>
<tr>
<td>Water/Sewage/Garbage</td>
</tr>
<tr>
<td>Home Phone</td>
</tr>
<tr>
<td>Cable/Satellite/Internet</td>
</tr>
<tr>
<td>Cell Phone</td>
</tr>
<tr>
<td>Other Utilities</td>
</tr>
<tr>
<td><strong>HOUSING SUBTOTAL:</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TRANSPORTATION:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto Loan</td>
</tr>
<tr>
<td>Other Loan (motorcycle, RV, boat)</td>
</tr>
<tr>
<td>Auto Insurance</td>
</tr>
<tr>
<td>Auto Maintenance</td>
</tr>
<tr>
<td>Auto Fuel</td>
</tr>
<tr>
<td>Other Transportation (bus, parking, toll roads, cabs)</td>
</tr>
<tr>
<td>Car Washes</td>
</tr>
<tr>
<td><strong>TRANSPORTATION SUBTOTAL:</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OTHER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Member Taxes (Federal, State, Social Security, Medicare, Life Insurance (SGLI))</td>
</tr>
<tr>
<td>Spouse Taxes (Federal, State, Social Security, Medicare)</td>
</tr>
<tr>
<td>Food</td>
</tr>
<tr>
<td>Household Supplies</td>
</tr>
<tr>
<td>Medical/Dental</td>
</tr>
<tr>
<td>Clothing</td>
</tr>
<tr>
<td>Barber/Beauty/Personal Care</td>
</tr>
<tr>
<td>Child Care</td>
</tr>
<tr>
<td>Child Support Paid</td>
</tr>
<tr>
<td>Deployed Member Expense</td>
</tr>
<tr>
<td>Contributions</td>
</tr>
<tr>
<td>Pet Expenses</td>
</tr>
<tr>
<td>Recreation/Sports/Entertainment</td>
</tr>
<tr>
<td>Miscellaneous (i.e., Laundry, Dry Cleaning, etc.)</td>
</tr>
<tr>
<td><strong>OTHER SUBTOTAL:</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<p>| TOTAL MONTHLY EXPENSES:                |
|                                       |</p>
<table>
<thead>
<tr>
<th>Name of Creditor</th>
<th>Debt Description</th>
<th>Monthly Minimum</th>
<th>Balance Owed</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Vehicle, Personal, Payday &amp; Student Loans, Credit Cards)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**CREDITOR PAYMENTS SUBTOTAL:**
3. Standardized Abbreviations List

<table>
<thead>
<tr>
<th>AD – Active Duty</th>
<th>DAV – Disabled American Veterans</th>
</tr>
</thead>
<tbody>
<tr>
<td>AD/SH – Husband who is Active Duty</td>
<td>DEBT – Indebtedness</td>
</tr>
<tr>
<td>AD/SW – Wife who is Active Duty</td>
<td>DEERS – Defense Eligibility Enrollment System</td>
</tr>
<tr>
<td>ADMIN – Administrative</td>
<td>DEF – Deficit</td>
</tr>
<tr>
<td>ADVPAY – Advance Pay</td>
<td>DFAS – Defense Finance and Accounting Service</td>
</tr>
<tr>
<td>ADVBAH – Advanced Basic Allowance for Housing</td>
<td>DHS – Department of Human Services</td>
</tr>
<tr>
<td>AER – Army Emergency Relief</td>
<td>DIC – Dependency &amp; Indemnity Compensation</td>
</tr>
<tr>
<td>AFAS – Air Force Aid Society</td>
<td>DISCH – Discharged</td>
</tr>
<tr>
<td>ALLOT – Allotment</td>
<td>DITY – “Do it yourself” move</td>
</tr>
<tr>
<td>APT – Apartment</td>
<td>DJMS – Defense Joint Military Pay System</td>
</tr>
<tr>
<td>ARC – American Red Cross</td>
<td>DL – Driver’s License</td>
</tr>
<tr>
<td>ASST – Assist/Assistance</td>
<td>DLA – Dislocation Allowance</td>
</tr>
<tr>
<td>Auth – Authorize(d) or Authorization</td>
<td>DOD – Department of Defense</td>
</tr>
<tr>
<td>BAH – Basic Allowance for Housing</td>
<td>EAS – End of Active Service</td>
</tr>
<tr>
<td>BAS – Basic Allowance for Subsistence</td>
<td>EFM – Exceptional Family Member</td>
</tr>
<tr>
<td>BBV – Blue Book Value</td>
<td>EFMP – Exceptional Family Member Program</td>
</tr>
<tr>
<td>BC – Budget Counselor</td>
<td>ELEC – Electric</td>
</tr>
<tr>
<td>BCD – Bad Conduct Discharge</td>
<td>ELV – Emergency Leave</td>
</tr>
<tr>
<td>BEQ/BKS – Bachelor Enlisted Quarters or Barracks</td>
<td>ENG – Engine</td>
</tr>
<tr>
<td>BGT – Budget</td>
<td>EST – Estimate</td>
</tr>
<tr>
<td>B/IL – Brother-in-Law</td>
<td>EVAL – Evaluation</td>
</tr>
<tr>
<td>BLE – Basic Living Expenses</td>
<td>FAP – Family Advocacy Program</td>
</tr>
<tr>
<td>CACO – Casualty Assistance Calls Officer</td>
<td>FHA – Federal Housing Authority</td>
</tr>
<tr>
<td>CCC – Consumer Credit Counseling Service</td>
<td>FICA – Federal Insurance Contribution Act (SSI)</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Full Form</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>CDAD – Child of deceased on Active Duty</td>
<td>F/IL – Father in Law</td>
</tr>
<tr>
<td>CDO – Command Duty Officer</td>
<td>FIT – Federal Income Tax</td>
</tr>
<tr>
<td>CFS – Command Financial Specialist</td>
<td>FMDP – Family Member Dental Plan</td>
</tr>
<tr>
<td>CIV – Civilian</td>
<td>FOIA – Freedom of Information Act</td>
</tr>
<tr>
<td>CK(s) – Check(s)</td>
<td>FSA – Family Separation Allowance</td>
</tr>
<tr>
<td>CMC – Command Master Chief</td>
<td>GF – Grandfather</td>
</tr>
<tr>
<td>CMD – Command</td>
<td>GM – Grandmother</td>
</tr>
<tr>
<td>CO – Commanding Officer</td>
<td>HH – Household</td>
</tr>
<tr>
<td>COLA – Cost of Living Allowance</td>
<td>HHG – Household Goods</td>
</tr>
<tr>
<td>CONUS – Continental United States</td>
<td>HOR – Home of Record</td>
</tr>
<tr>
<td>CW – Caseworker</td>
<td>HUMS – Humanitarian Transfer or Discharge</td>
</tr>
<tr>
<td>DAU – Sponsor’s Daughter</td>
<td>ID – Identification Card</td>
</tr>
<tr>
<td>INCL – Includes</td>
<td>PITI – Principal/Interest/Tax/Insurance</td>
</tr>
<tr>
<td>INS – Insurance</td>
<td>PNOK – Primary Next of Kin</td>
</tr>
<tr>
<td>JAG – Judge Advocate General or any mil lawyer</td>
<td>POV – Privately Owned Vehicle</td>
</tr>
<tr>
<td>LES – Leave and Earnings Statement</td>
<td>PRD – Projected Rotation Date</td>
</tr>
<tr>
<td>LL – Landlord</td>
<td>PREV – Previous</td>
</tr>
<tr>
<td>LOF – Lack of funds</td>
<td>PROJ – Projected</td>
</tr>
<tr>
<td>LP – Loco-parentis</td>
<td>P/T – Part Time</td>
</tr>
<tr>
<td>LTR – Letter</td>
<td>PYCK – Paycheck</td>
</tr>
<tr>
<td>LV – Leave</td>
<td>PYMT – Payment</td>
</tr>
<tr>
<td>LVM – Left Voice Mail</td>
<td>QTRS – Quarters</td>
</tr>
<tr>
<td>MED – Medical</td>
<td>RE – Regarding</td>
</tr>
<tr>
<td>MEDEVAC – Medical Evacuation</td>
<td>REC – Recommend(ation)</td>
</tr>
<tr>
<td>MO(S) – Month(s)/monthly</td>
<td>RECALERT – Recommend for Alert List</td>
</tr>
<tr>
<td>MOA – Memorandum of Agreement</td>
<td>RECV(D) – Receive(d)</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>MOU</td>
<td>Memorandum of Understanding</td>
</tr>
<tr>
<td>MSG</td>
<td>Message</td>
</tr>
<tr>
<td>MSM</td>
<td>Mismanagement</td>
</tr>
<tr>
<td>M/IL</td>
<td>Sponsor’s Mother in Law</td>
</tr>
<tr>
<td>MISC</td>
<td>Miscellaneous</td>
</tr>
<tr>
<td>MTF</td>
<td>Military Treatment Facility</td>
</tr>
<tr>
<td>NADA</td>
<td>National Automobile Dealers Association</td>
</tr>
<tr>
<td>NAS</td>
<td>Naval Air Station</td>
</tr>
<tr>
<td>NAVSTA</td>
<td>Naval Station</td>
</tr>
<tr>
<td>NIP</td>
<td>Not in Policy</td>
</tr>
<tr>
<td>NJP</td>
<td>Non-judicial Punishment</td>
</tr>
<tr>
<td>NLP</td>
<td>Non Loco-parentis</td>
</tr>
<tr>
<td>NMCRS</td>
<td>Navy Marine Corps Relief Society</td>
</tr>
<tr>
<td>NPD</td>
<td>No Pay Due</td>
</tr>
<tr>
<td>NSF</td>
<td>Non-sufficient Funds</td>
</tr>
<tr>
<td>OCONUS</td>
<td>Outside Continental United States</td>
</tr>
<tr>
<td>OEF</td>
<td>Operation Enduring Freedom</td>
</tr>
<tr>
<td>OHA</td>
<td>Overseas Housing Allowance</td>
</tr>
<tr>
<td>OIC</td>
<td>Officer in Charge</td>
</tr>
<tr>
<td>OIF</td>
<td>Operation Iraqi Freedom</td>
</tr>
<tr>
<td>OTR</td>
<td>Other</td>
</tr>
<tr>
<td>PC</td>
<td>Phone Call</td>
</tr>
<tr>
<td>PCS</td>
<td>Permanent Change of Station</td>
</tr>
<tr>
<td>PIF</td>
<td>Paid in Full</td>
</tr>
<tr>
<td>TANF</td>
<td>Temporary Assistance to Needy Families</td>
</tr>
<tr>
<td>TEMDU</td>
<td>Temporary Duty</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Full Form</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>TEMP</td>
<td>Temporary</td>
</tr>
<tr>
<td>UA</td>
<td>Unauthorized Absence</td>
</tr>
<tr>
<td>UCMJ</td>
<td>Uniform Code of Military Justice</td>
</tr>
<tr>
<td>USAF</td>
<td>US Air Force</td>
</tr>
<tr>
<td>USMC</td>
<td>US Marine Corps</td>
</tr>
<tr>
<td>USN</td>
<td>US Navy</td>
</tr>
<tr>
<td>VA</td>
<td>Veteran’s Administration</td>
</tr>
<tr>
<td>VERIF</td>
<td>Verified</td>
</tr>
<tr>
<td>W/</td>
<td>With</td>
</tr>
<tr>
<td>WIC</td>
<td>Women’s, Infants and Children</td>
</tr>
<tr>
<td>W/IN</td>
<td>Within</td>
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CSR VOLUNTEER AGREEMENT

I have read the Operation Homefront Southern California (OHSC) Client Services Representative Handbook and understand and agree to abide by all of the policies and procedures within.

Name__________________________________________________________

Signature_______________________________________________________

Date____________________________
SOUTHERN CALIFORNIA

Section D:
Appendix
Applicant Authorization and Consent for Release of Information

We welcome your application with Operation Homefront and we are proud that our success is the result of the quality and caliber of our volunteers. In pursuit of that excellence, we require as a condition of volunteering, that some applicants consent to and authorize a verification of the background information submitted on the application or resume.

I, the undersigned applicant, do hereby certify that the information provided by me for the purpose of volunteering is true and complete to the best of my knowledge. I understand that if I am accepted as a volunteer, any false statement will be considered as cause for possible dismissal. The results of this verification process will be used to determine volunteer eligibility under the Operation Homefront volunteer policies. All results will be proprietary and will be kept Confidential. The information obtained will not be provided to any parties other than to designated Operation Homefront personnel.

This release and authorization acknowledges that Operation Homefront may now, or at any time that I am volunteering, conduct a verification of Education, Previous Employment, Work History, contact personal references, Credit, require that I provide a urine specimen to be tested for the presence of drugs or alcohol, and motor vehicle records, any Criminal History Record information pertaining to me which may be in the files of any Federal, State or Local Criminal Justice agency in any State, and any other information as deemed necessary to fulfill the volunteer requirements and retrieve in conformance with the Americans Disabilities Act, I acknowledge by my signature below that my volunteer status is contingent upon a satisfactory background verification.

I have read and understand this release and consent, and I authorize the background verification. I authorize persons, schools, current and former employers, and other organizations and agencies to provide Operation Homefront with all information that may be requested. I hereby release all of the persons, and agencies providing such information from any and all claims and damages connected with their release of any requested information. I agree that any copy of this document is valid as the original. (See next page for agreement and signature line.)
I do hereby agree to forever release and discharge Operation Homefront, the agent, and their associates to the full extent permitted by law from any claims, damages, losses, liabilities, costs and expenses, or any charge or complaint filed with any agency arising from the retrieving and report of this information. According to the Federal Fair Credit Reporting Act, I am entitled to know if my volunteer application was denied based on information obtained by Operation Homefront and to receive upon written request, a disclosure of the public record information and of the nature and scope of the background verification report.

______________________________
First Name               Middle Name               Last Name               Maiden Name (if applicable)
______________________________
Social Security Number               Date of Birth

______________________________
Address               City               State               Zip Code

______________________________
Phone Number               D/L # & State

______________________________
Signature (must sign)
Donated Items Form

In-kind Donations
In-kind Donations are extremely valuable to OHSC and can be made by individuals, organizations, or corporations. OHSC coordinates, accepts and distributes donated goods and services including:

- **Services**
  - Accounting services
  - Automotive repair
  - Heating and air conditioning services
  - Legal support
  - Roofing

- **Goods**
  - Children’s books
  - Computers
  - Clothing
  - Furniture (except stuffed furniture)
  - Gift cards
  - Household items (excluding food unless specified in specific event)
  - Most other non-monetary items.

  **NOT accepted:** Please note that OHSC does NOT accept the following:
  - Food or formula of any kind (unless specifically stated)
  - Stuffed furniture

Stock Donations
By donating gifts of stock and securities to OHSC, donors can take advantage of the following great benefits:

- Receive an immediate charitable income tax deduction for the full value of your gift
- Pay no capital gains tax (on assets held for more than a year)
- Reduce adjusted gross "taxable income"
- Make larger gifts at a lower cost than cash

Real Estate Donations
OHSC will make good use of residential property, vacation homes, commercial property, apartment buildings, farms or vacant land. In many cases, real estate assets are used to expand OHSC service offerings to serve many future generations of military families. Donors can avoid capital gains tax and receive a charitable deduction for the full fair market value of the property.

Trust and Wills
Trust and wills are a great way for planned giving, as assets are not tied up during one’s lifetime yet these assets will go toward the future benefit of military families.

Cash
Cash gifts are welcomed and accepted in any amount.
Contact Information

Email: info@operationhomefront.edu

Phone Number: 858-695-6810
or Toll Free: 866-424-5210

Address:
Operation Homefront of Southern California
PO Box 26747
San Diego, CA 92196

Website:
http://www.operationhomefront.net/socal/default.aspx
Volunteer Exit Survey—Volunteer Evaluation

The opinions of our volunteers are very important in evaluating our program policies and procedures. Please help us improve our volunteer management by answering the questions below. Please use additional sheets of paper if necessary. We want to hear about your experience and how we can make our organization better!

Return to: Operation Homefront Southern California PO Box 26747 San Diego 92196

1. Please give your reason for leaving the program.

________________________________________________________________________

________________________________________________________________________

2. How would you improve volunteer orientation and/or training?

________________________________________________________________________

________________________________________________________________________

3. Do you feel that OH staff used your volunteer time wisely? YES____ NO_____ If no, please explain.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

4. Do you feel that you gained new skills and knowledge through your volunteer work? YES_____ NO_____. If yes, please identify skills gained.

________________________________________________________________________

________________________________________________________________________

5. Did you feel that you were a part of the organization while working as a volunteer? YES_____ NO_____. If no, please explain.
6. How did your volunteer job compare with your original expectations?

7. Would you recommend others to volunteer with Operation Homefront?
YES______ NO_______ Please explain reason.

8. What did you get out of your experience with Operation Homefront?

9. Please add anything else you would like to tell us about your volunteer experience or how we can make OHSC a better organization:
Volunteer Evaluation and Feedback Form

Volunteer:                              Volunteer Job Title:

Date of this Performance Review:       Performance Review Period:

Volunteer job performance is determined using the following categories:

**Outstanding** (4 Points): Performs significantly beyond job requirements in virtually all aspects of the position. Demonstrates exceptional achievement in key areas of responsibility. Quality of work is outstanding.

**Exceeds Expectations** (3 Points): Performs beyond job requirements in many aspects of the position. Completes many projects ahead of schedule. Quality of work exceeds expectations in most areas.

**Meets Expectations** (2 Points): Fulfills requirements in virtually all areas and may go beyond expectations in some areas. Completes work and projects on time.

**Needs Improvement/Unable to Evaluate** (1 Point): Does not meet the minimum requirements and expectations in some areas. Quality and/or quantity of work needs improvement in some key areas.

**Section 1: Evaluation**

Using the above Rating Categories, and the points associated with each category, employee’s evaluation follows. If factor is not relevant, “N/A” is marked:

**Knowledge & Professional or Technical Skill**

Volunteer is knowledgeable about the job ___

Works independently with minimal supervision ___

Knows when to refer questions or problems to others ___

*Average Score: ___*
Decision-Making, Analysis & Judgment

Focuses on critical elements of a situation; draws sound conclusions ___

Uses discretion when sharing information ___

Is flexible; adapts to changing conditions; makes necessary adjustments; reprioritizes workload to assure attainment of goals ___

Average Score: ___

Written and Oral Communications

Is tactful, diplomatic, and polite in conversation with other staff, clients, donors, volunteers, and the military ___

Frequently updates Director of Client Services on status of daily work and on-going projects ___

Average Score: ___

Leadership, Supervision, Teamwork & Interaction with Others

Understands and complies with established OHSC policies and procedures ___

Produces a volume of work that avoids backlogs or increasing workloads for others ___

Understands and complies with established OHSC policies and procedures ___

Average Score: ___

Client Services & Professional Development

Maintains complete confidentiality in regard to OHSC Client information ______

Is responsive and positive in meeting OHSC Client needs; meets requests with a sense of urgency and professionalism ___

Handles difficult situations/complex client requests in a courteous, polite, tactful manner ___

Provides complete and accurate information to clients ___

Average Score: ___

Additional Comments:
Section 2: Feedback

Questions for discussion:

1. What is your favorite part about volunteering for OHSC? Least favorite?
2. How can we make your time here more efficient, or more enjoyable?
3. Do you feel supported by OHSC staff?
4. How well do you feel you are able to fulfill your volunteer duties?
5. Do you have any suggestions on ways we can improve our volunteer program or the program for which you are volunteering?

Comments:
Volunteer Release and Waiver of Liability

This Release and Waiver of Liability (the “Release”) executed on this date, ______________, by __________________ and if, applicable, in conjunction with ________________.

(Volunteer Print Name) (name of parent/guardian if under 18)

the parent having legal custody or legal guardianship of the volunteer, in favor of Operation Homefront Inc, a nonprofit corporation and Operation Homefront – Southern California Inc., a California nonprofit corporation, their directors, officers, employees, and agents (collectively, “OH”). The Volunteer desires to work as a volunteer for OH and engage in the activities related to being a volunteer (the “Activities”). The Volunteer hereby freely, voluntarily, and without duress executes this Release under the following terms:

1. **Release and Waiver.** Volunteer does hereby release and forever discharge and hold harmless OH and its successors and assigns from any and all liability. Claims, and demands of whatever kind of nature, either in law or in equity, which arise or may hereafter arise from Volunteer’s Activities with OH. Volunteer understands that this Release discharges OH from any liability or claim that the Volunteer may have against OH with respect to any bodily injury, personal injury, illness, death or property damage that may result from Volunteer’s Activities with OH whether caused by the negligence of OH or its officers, employees, volunteers, agents or otherwise. Volunteer also understands that OH does not assume any responsibility for or obligation to provide financial assistance or other assistance, including but not limited to medical, health, or disability insurance in the event of injury or illness.

2. **Medical Treatment.** Volunteer does hereby release and forever discharge OH from any claim whatever which arise or may hereafter arise on account of any first aid treatments or service rendered in connection with the Volunteer’s Activities with OH or with the decision by ally representative or agent of OH to exercise the power to consent to medical or dental treatment as such power may be granted and authorized in the Parental Authorization for Treatment of a Minor Child.

3. **Assumption of the Risk.** The Volunteer understands that the Activities include work that may be hazardous to the Volunteer including but not limited to, home repairs, moving
assistance, transportation to and from the work sites, and special events. Volunteer hereby expressly and specifically assumes the risk of injury or harm in the Activities and releases Habitat from all liability for injury, illness, death or property damage resulting from the Activities.

4. **Insurance.** The Volunteer understands that except as otherwise agreed to by OH in writing, OH does not carry or maintain health medical, or disability instance coverage for any Volunteer. Each Volunteer is expected and encouraged to obtain his or her own medical or health insurance coverage.

5. **Photographic Release.** Volunteer does hereby grant and convey unto OH all right, title and interest in any and all photographic images and video or audio recordings made by OH during the Volunteer’s Activities with OH, including, but not limited to, any royalties, proceeds, or other benefits derived from such photographs or recordings.

6. **Other.** Volunteer expressly agrees that this release is intended to be as broad and inclusive as permitted by the laws of the State of Texas and that this Release shall be governed by and interpreted in accordance with the laws of the State of Texas. Volunteer agrees that in the event that any clause or provision of this Release shall be held to be invalid by any court of competent jurisdictions the invalidity of such clause or provision shall not otherwise direct the remaining provisions of this release which shall continue to be enforceable.

**By signing below, the Volunteer and, if applicable the parent/guardian, has read, understood, and executed this Release as of the date first above written.**

Parent/Guardian: __________________________ Volunteer: __________________________

(if under 18) (Signature) (Signature)

Phone: __________________________ Address: __________________________

Email: __________________________ __________________________

**Emergency Contact #1 (Required):**

Name: __________________________ Relationship: __________ Telephone #’s: __________________________

**Emergency Contact #2:**

Name: __________________________ Relationship: __________ Telephone #’s: __________________________
Organizational Chart

Board of Directors

Chapter President
Jay Anderson

Director of Client Services
Cyndy Gronbach

Director of Operations
Tricia De La Paz

Bookkeeper
Michelle Chavez

Administrative Assistant

VP Fund Raising and Development
Karla Winter-Schulz

Client Service Representatives

Volunteers

Director of Development (Orange County)

Development Manager (San Diego)
Photo/Video Release Form

I hereby grant Operation Homefront permission to use the photographic/video images taken of myself and/or my dependents and that Operation Homefront shall have all rights, title and interests to the image(s) and the copyrights thereto and all the related rights for their entire terms, including renewal, free and clear of all encumbrances.

By_________________________ ______________________
Signature Date

________________________________________
Subject(s) Name

Address ___________________________________________________________

Daytime phone ( ) ______________________
# Expense Reimbursement Form

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<th>Date</th>
<th>Vendor</th>
<th>Purpose (if applicable)</th>
<th>Client</th>
<th>Accounting Code (for accounting use only)</th>
<th>Class (for accounting use only)</th>
<th>Amount</th>
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TOTAL $

*** Must attach all receipts and retain prior approval for expenses incurred.

Submitted by: ___________________________  Date: ____________

Approved by: ___________________________  Date: ____________
# Mileage Reimbursement Form

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<th>Date</th>
<th>Starting Mileage</th>
<th>Ending Mileage</th>
<th>Purpose for Trip (if applicable)</th>
<th>Client</th>
<th>Accounting Code (for accounting use only)</th>
<th>Class (for accounting use only)</th>
<th>Miles</th>
<th>Total Miles</th>
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**Notes:** Reimbursement will be paid on business mileage only.

Submitted by: ________________ Date: __________

Approved by: ________________ Date: __________

___ Please check here if you do not wish to be reimbursed for your mileage as a donation to Operation Homefront-Southern California
**eTapestry System**

**eTapestry System** ([www.etapestry.com](http://www.etapestry.com)): System is used to maintain contact information for all donors and to track all donations. The website is [www.etapestry.com](http://www.etapestry.com). In order to have access to the system, a unique user ID will need to be setup for you that has permissions for the Southern California Chapter.

**Getting Started (user ID, email and login)**

- The Director of Client Services will submit the user ID request to National Headquarters. Volunteers will be notified with a user ID and temporary password by email. Upon logging on, please follow instructions in regard to changing your password.
- In order to use the system, an email address must be associated to your user ID. If user ID is not associated with email address, the following error message will occur:

  - You have not defined an email address on your my User Primary Persona. This may prevent you from receiving important notifications. You will also not be able to reset a forgotten password until you have done so.

- If message occurs please notify the Director of Client Services who will then submit a request to National Headquarters. Please provide the email address that you use when volunteering for OHSC.
- Once you have logged onto the eTapestry System, go to the “Help” tab. Under that is a tab called “Recorded Training.” Please review these recordings, to understand how the system works.

**Entering Donor Contact Information:**

1. Obtain the folder from the Director of Client Services
2. Click on “Find Account” to see if the donor’s account already exists
3. Enter the donor's name or last name next to “Search For”
4. Click on “Find”
5. If the donor's name appears:
   a. Verify the contact information
   b. If it needs to be changed:
      i. Click on the client
      ii. Click on "Personal Primary"
      iii. Make the necessary changes
      iv. Click on “Save and Search” to go to the next donor
   c. Put a checkmark next to the donor's name on their check that was deposited or next to the pink Donation Receipt number
6. If the donor's name does not appear, enter the following information:
   a. ALWAYS USE CORRECT PUNCTUATION
   b. NAME: (e.g. Mr. And Mrs. Robert Smith)
   c. See addendum for military titles and government official address etiquette SORT:
1. “Last Name, First Name” if the donor is an individual
   i. Always enter the last name before the first name separated by a comma
   ii. Full company name if it’s a business (e.g. ABC Company)
d. PERSONA: (select one of the following):
   i. Personal
   ii. Business
   iii. Foundation
e. ADDRESS:
   i. Street
   1. DO NOT USE HARD RETURNS in this field
   2. Enter all info on one line separated by a comma if necessary
      a. Ex: 301 B St., Suite 100
      b. Again, always use correct punctuation
   ii. City
   iii. State
   iv. Postal (Zip) Code
   v. County (if you know it)
   vi. Country
f. VOICE NUMBER (without dashes and if available)
g. MOBIL NUMBER (without dashes and if available)
h. FAX NUMBER (without dashes and if available)
i. EMAIL
j. SHORT SALUTATION; (Mr. and Mrs. Smith)
k. LONG SALUTATION:
   i. Individual, e.g. Mr. & Mrs. Bob Smith
   ii. Full company name if it’s a business (e.g. ABC Company)
l. ACCOUNT TYPE (select one of the following):
   i. Business (or Company or Corporation?)
   ii. Individual
   iii. Foundation
m. OWNER: (MUST BE FILLED IN and will always be SOCAL)

7. Click “Next”
8. Review the information you entered
9. Click “Save and Search” to go to the next donor
10. Put a checkmark next to the donor’s name on their check that was deposited or next to the pink Donation Receipt number

Entering Donor Donations:

1. For monetary donations:
   a. Click on the client
   b. If the client is unknown, do a “Find” for “Anonymous” and then click on it
   c. Client on “Journal”
   d. Next to “Add” select “Gift/Pledge”
   e. Hit “Enter”
   f. Enter the following information:
      i. DATE: (enter Bank Deposit Date)
      ii. RECEIVED AMOUNT: (enter the dollar amount)
      iii. FUND: (select “General”)
      iv. CAMPAIGN: (select the appropriate category or “Unsolicited”)
      v. APPROACH: (select “Unsolicited”)
g. If the donor gave cash, Under “Gift Type” select “Cash”
h. If the donor gave a check:
   i. Under “Gift Type” select “Check”
   ii. Next to “Check Date” enter the date on the check
   iii. Next to “Check Number” enter the donor’s check number
i. Only enter information next to “Note” if there is a story
j. Click “Save and Search” to go to the next donor
k. Put a checkmark next to the check number on the donor's check if the donation was via a check

2. For non-monetary donations:
   a. Click on the client
   b. Client on “Journal”
   c. Next to “Add” select “Gift/Pledge”
   d. Hit “Enter”
e. Enter the following information:
      i. DATE: (enter date on the pink Donation Receipt)
      ii. FUND: (select “General”)
      iii. CAMPAIGN: (select the event or “Unsolicited”)
      iv. APPROACH: (select “Unsolicited”)
f. Under “Gift Type” select “In Kind”
g. If the donor gave a check:
   i. Under “Gift Type” select “Check”
   ii. Next to “Date” enter the date on the pink Donation Receipt
h. Next to “Note” list the items that were donated
i. Click “Save and Search” to go to the next donor
j. Put your initials next to the pink Donation Receipt number
Vehicle Check-Out/In Procedures

General Information
1. Operation Homefront has three vehicles:
   a. Ford Moving Truck
   b. Ford Van
   c. Chevy Van
2. Only authorized drivers who are insured by Operation Homefront are authorized to operate ANY Operation Homefront vehicle.
3. Vehicle will be checked out/in with a Operation Homefront Staff Member
4. Operation Homefront vehicles are to be used for official use only. Personal use is prohibited.

Rules of the Road
All traffic laws must be obeyed while operating an Operation Homefront Vehicle to include:
   a. No cell phone use unless using a hands-free device
   b. Seatbelts must be worn at all times
   c. Adhere to posted speed limits
   d. No drinking and driving

Checking Out and Checking In a Vehicle:
1. A staff member will issue keys, trip ticket and itinerary for vehicle to be checked out.
2. You are responsible for inspecting the vehicle prior to departure. The following should be checked:
   a. Lights (headlight, turn signals and brake lights) functioning properly
   b. Visual check of tires
   c. Safety equipment available
   d. Damage observed – note on trip ticket.
   e. Glove compartment – make sure the vehicle has current registration, insurance card and an accident report form.
   f. Gas level
3. Vehicles returning should have all debris removed from the vehicle
4. Any vehicle malfunctions, problems, repairs, missing equipment, etc. should be reported to a staff member immediately.
5. Please secure the windows, doors, and latches and lock the vehicle. Return the keys to staff member and report any incidents.

In case of an accident, follow these procedures:
1. Check to see if there are any injured parties. If so, call 911.
2. If there are no injured parties, and if the vehicle is movable, move out of the way of traffic.
3. Call the police and report the incident.
4. Call the Operation Homefront Office and report the incident.
5. An OHSC representative will assist you in completing the police report.

**MOTOR VEHICLE TRIP TICKET**

Please read all instructions carefully.

<table>
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<tr>
<th>NAME OF ALL DRIVERS:</th>
<th>DESTINATION</th>
<th>VEHICLE TAG NO.</th>
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<th>PHONE NO</th>
<th>TYPE OF VEHICLE</th>
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**INSTRUCTIONS:**
You are responsible for reporting vehicle defects and accidents immediately.

**SIGNATURE OF SUPERVISOR / MANAGER:**

“I have authorized the driver signing below to use this vehicle for official business only.”

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<tr>
<th>DATE ISSUED</th>
<th>TIME OUT</th>
<th>MILEAGE OUT</th>
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<th>DATE RETURNED</th>
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**Was the vehicle involved in an accident while in your custody?**

☐ YES ☐ NO

**COMMENTS:**

*This vehicle will be used for official business only. I have reviewed and complied with Operation Homefront, STANDARD OPERATING PROCEDURE.*

**SIGNATURE OF DRIVER:**
Volunteer Time Card

Name (Please Print):_________________________________________Month:________________20____________

Mailing Address:________________________________________________________________________________________________

Phone:_________________________Email:______________________________________________________________________________

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<tr>
<th>Date</th>
<th>Activity</th>
<th>Hours</th>
<th>Notes/Feedback</th>
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Total Hours_____

Time sheets should be signed by the Director of Client Services and returned at the end of each month. You may hand deliver, fax, email, or mail them (PO Box 26747, San Diego, CA 9196; Fax: 858-424-5210)

Volunteer Signature*
_________________________________________________________Date______________________________

Director of Client Services________________________________________Date__________________________