Frederick O. Blankenship American Legion Post 117 413 South Main Street Butler, PA 16001



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POLICY and PROCEDURE

ASSISTANCE TO MEMBERS of AMERICAN LEGION POST 117

Purpose: To provide emergency financial relief for expenses incurred by a Veteran member, or his/her immediate family member, due to a catastrophic event. Assistance for criminal conduct or activities related thereto; or hardship caused by such conduct or activities shall be prohibited, and exclude any event covered or eligible for relief by insurance, i.e., auto, health or any other indemnification. Sons of the American Legion and Auxiliary members are also eligible.

Scope: Only Veteran members, Sons of the American Legion or Auxiliary members of American Legion Post 117 shall be eligible for this assistance and their identity shall be anonymous to all but select members of the Executive Board assigned by the Commander, or in his/her absence, by the Adjutant to investigate and *validate* the need. This fund shall be known as the "Almoner Program," and the financial report, when given, shall be termed only as, "An Almoner's Veteran's Assistance disbursement of an amount investigated and approved by the Executive Board."

In concert with the designated, "Almoner," the members authorized to sign the check will also be privy to the recipient's identity, and the justification for the assistance. The only other person so informed shall be the Commander and all efforts will be made to maintain the recipient's anonymity.

From time-to-time, the Commander or Adjutant, shall publish a notice to the membership of this program so that they are aware that emergency assistance is available.

Funds for this program shall be drawn from the appropriate account(s) as determined by the Financial Officer and Post Commander.

Procedure: When a member seeks assistance, the following investigatory documentation shall be required.

- 1. Specific type of hardship to include the cause.
- 2. Documented bills and expenses.
 - a. Catastrophic medical bills, or cancelled checks.
 - b. Electric and/or gas.
 - c. Water/Sewage except for well and septic systems.
 - d. Previous year's earnings (W-2 or Tax Return).
 - e. The previous two month's Rent/Mortgage payment receipts or cancelled checks, and/or eviction notices, or pending foreclosure notices.
 - f. Auto payments and insurance payments.
 - g. Applicant's statement (see Attachment).

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Disbursed funds shall be by check *only* and shall be made payable *only* to a mortgage company, landlord, utility, or medical entity. Payments may be made for non-insured, mechanical auto repairs, but NO payments shall be made for auto liability or collision damages where insurance is required by law. At no time will payment be made directly to any individual recipient.

The designated Almoner (board member so designated) shall meet with the member needing assistance to personally review the documentation and verify the need. The Almoner will report his findings to the Post Commander and make a recommendation to the Executive Board for approval by majority vote. This Policy & Procedure, and the attached "MEMBER APPLICANT STATEMENT" shall be reviewed with the Post Member, and he/she is required to sign and date it.

There will be times when a members need is immediate and cannot wait until a Board meeting for approval. In such cases, a tele-conference or a notification by email can be used in cases of urgent, immediate need. The Almoner shall then advise the Adjutant who will inform the Executive Board members by phone, followed by an email repeating the need and *justification for expedient action*; only after the case has been investigated. Members will reply with their vote and the Adjutant shall document the voting for each member to initial at the next board meeting.

The results of the investigation, all documentation, and either the votes at a meeting or by email, shall be secured in an envelope, sealed, and signed by the Commander, Adjutant, and Judge Advocate. Those records shall be held indefinitely in the event of any audit by the IRS or Department of Pennsylvania American Legion. The envelope with the seal intact and labeled, "Almoner Disbursement - CONFIDENTIAL," and labeled with the date shall be secured by the Adjutant.

| Post Commander | Date |
|----------------|------|
| | |
| Post Adjutant | Date |

Attachment

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MEMBER APPLICANT STATMENT

| • • | , hereby affirm that none of the expense, are covered by any type of insurance or any other firm that my need is not due to any type of criminal of | r type of |
|---------------------------------------|--|-----------|
| Pennsylvania Web Portal. Misstatement | vocate will periodically check The Unified Judicial Sy of facts concerning need may result in charges unions, and may result in criminal charges of fraud. | |
| Signature (Veteran Applicant) | Date | |
| Executive Board Member Witness | Date | |