

# REAL: Readiness Essentials for Army Leaders

## OPERATIONS

Meetings and Activities



# STEPS FOR UTILIZING VIDEO TELECONFERENCING AT FRG MEETINGS

There are many facilities equipped with Video Teleconferencing (VTC) capabilities. This is a secure way for families to attend their unit's Family Readiness Group (FRG) meeting without having to travel long distances.

## Setting Up a VTC

Before the FRG meeting date, FRG Leaders interested in setting up a VTC should contact their Family Readiness Support Assistant (FRSA) or Rear Detachment Staff. Once the locations are chosen, a reservation must be made through the a *minimum* of one week in advance, unless there is an emergency.

## Attending a VTC

The FRG Leader should have the phone numbers for all o representatives for the locations being used that day. They should also have the VTC number in case of any technical issues. Once the VTC is scheduled to start, a camera in the room will turn on to start the call. Representatives can help with any questions about microphones and remotes. FRGs are expected to follow the building rules regarding food and beverages and to clean up after themselves.

## Cancelling a VTC

Occasionally, a VTC satellite location or entire meeting must be cancelled due to low attendance or weather. Please provide family members and representatives with a *minimum* notice of 24 hours of this cancelation due to weather or low attendance. If the minimum notice cannot be met and the VTC is still cancelled, please still call.

## VTC Best Practice

Send out reminders/flyers and have family members RSVP a week in advance for the VTC to have an estimate head count of participants. Also, select a FRG team member or family member to be a host/hostess and greet family members as they arrive for the VTC.

<b>Family Readiness Group Monthly Meeting</b>						
Facilitator and Contact Number						
Date:		Time:		Location:		
Meeting Topic:						
Facilities Contact:						
Equipment Needed:						
Childcare Contact:						
Food and Beverage:						
RSVP:	Adult:		Children 0-4:		Youth 5+:	
Special Needs:						
Notes						
<b>Checklist</b>						
<b>Pre Meeting</b>				<b>Supplies for Meeting</b>		
	Command Authorization to hold event				Name Tags	
	Date and Time Confirmed				Pens	
	Meeting location reserved				Notepads	
	Involved presenters notified with clear expectations					
	Invite Families (BCC Line)			<b>Post Meeting</b>		
	Key Contacts remind Families				Follow up on any questions/concerns	
	Contact Speaker				Conduct After Action Review with FRG Team	
					Thank You cards sent to necessary parties	
<b>Week Before Meeting</b>						
	Confirm Childcare			<b>Action items to be filed in FRG Binder</b>		
	Confirm Speaker				Commander authorized meeting	
	Confirm Location				Purchase request form with receipts	
	Send reminder to Families (BCC)					
<b>Resources for Meeting</b>						
	Speaker Handouts					
	Sign in Sheet					
	Evaluation Sheet					

## FRG Annual Plan

	<b>FRG Business</b>	<b>FRG Planning</b>	<b>Fun for All</b>	<b>Educating Soldiers &amp; Families</b>	<b>Supporting Volunteers</b>	<b>Fundraising</b>
<b>January</b>	Create a year-long plan for the FRG with input from members. Unit Announcements / FRG & Community Info / Welcome & Farewells	Motor pool hot food fundraiser / February: Black History Month, Valentine's Day, Super	Cartoon Guess Who, etc.	Have the Post Archaeological Center come speak. Ask your FRSA for details!	Check out the FRG Leader Classes	Submit Request for Fundraising Approval for motor pool hot food sale
<b>February</b>	Make plans and form committees for Easter party. Unit Announcements / FRG & Community Info / Welcomes & Farewells	March: Women's History Month, Poison Prevention Week, St.	Make Valentines for friends and family. Women's history coloring pages	Couples dance class in honor of Valentine's Day - Unit Chaplain	AFTB Level K - Great for newer military spouses.	Hot Food Sale in the Motor Pool
<b>March</b>	Reports for Easter party. Unit Announcements / FRG & Community Info / Welcomes & Farewells	April: Volunteer Recognition, Month of the Military Child, Earth Day, PCS season	St. Patrick's Day Potluck	Be Red Cross Ready by hosting a Red Cross briefing.	Review crisis scenarios with key volunteers and POCs. Make a game out of it.	
<b>April</b>	Unit Announcements / FRG & Community Info / Welcomes & Farewells	Bowling party. May: Asian-Pac Heritage month, Teacher's Day, Cinco de Mayo, Military Spouse Day, Mother's Day, Armed Forces Day, Last Day of School,	Easter Egg Hunt	Relocation Readiness Program Overview to include the Lending Closet,	National Volunteer Month - find what volunteers activities are scheduled. Send your volunteers thank you cards / small gift.	Brainstorm with your volunteers for a unique fundraiser.
<b>May</b>	Make plans and form committees for unit organizational day. Unit Announcements / FRG & Community Info / Welcomes & Farewells	Plan craft for next FRG Mtg. June: Flag Day, Father's Day, Summer fun, vacation and traveling.	Bowling Party	Summer vacation planning on a budget. Call Tickets and Tours	Enjoy some downtime!	
<b>June</b>	Org day reports. Unit Announcements / FRG & Community Info / Welcomes & Farewells	Motor pool fundraiser. July: 4th of July, picnics, summer safety for families.	Hobby / Craft Class: stamping, scrapbookin g, etc.	Financial management classes	Speak with your command about planning a unit volunteer recognition ceremony at some point in the year.	Submit Request for Fundraising Approval for motor pool food sale

## FRG Annual Plan

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<b>July</b>	Unit Announcements / FRG & Community Info / Welcomes & Farewells	Plan summer craft for kids. August: Back to school, Labor Day.	Organizational Day	Employment Readiness Program Overview.	Ask your FRSA about a community resource tour. Great info for all!	Sale in the motor pool featuring lemonade and cool treats.
<b>August</b>	Make plans and form committees for Halloween / Fall party. Unit Announcements / FRG & Community Info / Welcomes & Farewells	Plan Back to School Picnic. September: Hispanic Heritage Month, Grandparents Day, Patriot Day.	Summer crafts for kids	AFAP (Army Family Action Plan) Overview.		
<b>September</b>	Halloween / Fall party reports. Unit Announcements / FRG & Community Info / Welcomes & Farewells	October: Columbus Day, voter's registration, Halloween / Fall	Back to School Picnic	A Family Advocacy Class	Bake cookies or brownies for the FRG Meeting and let everyone know how much you and the unit appreciate their participation.	Submit Request for Fundraising Approval for doing a Haunted House.
<b>October</b>	Make plans and form committees for Holiday party. Unit Announcements / FRG & Community Info / Welcomes & Farewells	November: Thanksgiving, voter's registration and elections.	Halloween / Fall Party	Community Resources Class - AFTB		Unit Haunted House
<b>November</b>	Reports for Holiday party. Unit Announcements / FRG & Community Info / Welcomes & Farewells	Baked goods for Single Soldiers in barracks. December: Christmas, Hanukkah, Kwanzaa, Gift wrapping at PX.	Thanksgiving Social	Ask the National Military Family Association rep to give an overview and talk about upcoming scholarships.		
<b>December</b>	Annual FRG Financial Reports due by 30 Jan. Unit Announcements / FRG & Community Info / Welcomes & Farewells	FRG Downtime - Relax and Enjoy! Encourage FRG members to enjoy the holidays and their families. January: Annual FRG Plan, MLK Day.	Holiday Party, ornament / cookie swap	FRG Downtime!	Send holiday cards for your key volunteers.	Gift Wrap at the PX

# TIPS FOR RUNNING AN EFFECTIVE MEETING

## Before the meeting:

- Determine the purpose of the meeting. Are you planning an event? Putting together the newsletter? Providing training or hosting a speaker?
- What resources will you need? Childcare? Refreshments? Audio-visual equipment? Tables and chairs? What size room?
- Set the agenda and distribute it prior to the meeting so that everyone will know what to expect. Ask for input if possible before setting the agenda or set at least part of the next meeting's agenda as a closing activity at each meeting.
- Include a starting and ending time with the agenda.
- Prepare any visual aids you will need.

## At the meeting

- Greet people as they arrive. If the group is small, you can do introductions as people come in. Otherwise, do introductions as the first part of the meeting. Consider nametags if you will have new people or have only met together a few times.
- Review the agenda and set any ground rules.
- Encourage discussion and participation. This may mean drawing people out who are not sharing, and tactfully bringing others to a close.
- Take minutes.
- Summarize what has been accomplished or resolved for each agenda item.
- Recognize success and achievement.

## After the meeting:

- Send out the minutes.
- Follow up on action items.
- Start the agenda for the next meeting.
- Do all of the above in a timely manner.

## Special tips for teleconference or virtual meetings:

- Always check equipment before every meeting.
- Send out the agenda early.
- Have participants log on five to ten minutes before starting the meeting.
- Avoid background noise.
- Have participants state their name before speaking.
- Don't multi-task.
- Describe or explain pauses for those who can't see.
- Sequence responses in a set order to avoid everyone talking at once.

FRG Meeting		
Date	Time	Location
Meeting called by		
Type of meeting		
Facilitator		
Note taker		
Timekeeper		
Attendees:		
Agenda Topics		
Time Allotted	Presenter	
Discussion		
Conclusions		
Action items	Person Responsible	Deadline
Agenda Topics		
Time Allotted	Presenter	
Discussion		
Conclusions		
Action Items	Person Responsible	Deadline
Agenda Topics		
Time Allotted	Presenter	
Discussion		

Conclusion		
Action Items	Person Responsible	Deadline
Agenda Topics		
Time Allotted	Presenter	
Discussion		
Conclusions		
Action Items	Person Responsible	Deadline
Agenda Topics		
Time Allotted	Presenter	
Discussion		
Conclusions		
Action Items	Person Responsible	Deadline
Agenda Topics		
Time Allotted	Presenter	
Discussion		



## FRG Monthly Report

Unit	Month

This report is to be completed by the FRG Leader and turned in to the FRSA by the last Wednesday of the month.

### 1. Past FRG Events

Activity Type	Date	Subject/Activity	No. of People	What can be improved?

Activity Types: FRG Meeting, FRG Event, FRG Fundraiser, FRG Training/Brief, etc.

### 2. Next month's upcoming FRG Events (planned and tentative)

Activity Type	Date	Time	Subject/Activity	Location

### 3. Informal Fund Status

Date of Last Report	Income	Expenses	Balance

### 4. Did you recruit any new volunteers?

Name	Position	Registered	Trained	Contact Info

### 5. What issues did you or any FRG volunteers help Families with?

Issue	Action Taken

### 6. Do you have any issues or planning you would like assistance with?

\_\_\_\_\_  
FRG Leader

\_\_\_\_\_  
Date

# FRG Meeting Report

## October 5, 20XX

**Meeting held:** Chapel, 5:45-6:30 PM.

**Present were:** Sign in Attached

### Group Discussed:

- Soldier 4 A Day AAR – Around 30 family members attended, not including soldiers. The range portion was postponed due to the weather, looking to reschedule 5 or 19 November.
- Holiday Bazaar Bake Sale – 7 October, 1:15-4:30 at Pavilion. Drop off individually wrapped goodies at the unit or the bake sale.
- Decided to hold the Halloween party on 28 October, 6:30 PM. Will have a costume contest with prizes donated from area businesses. 1SG & CPT Peters will give a day off and a cookout to the best-decorated office.
- Door prize of a Halloween bowl won by Mrs. xxx.

### Concerns:

- Mrs. xxx would like to see the FRG set up a babysitting Co-op, especially with the deployment coming up. The FRG will send out an email looking for interested volunteers.

### Dates to Remember:

- AFTB October 18-19
- CYSS Harvest Fest 6:00-8:00 October 29<sup>th</sup>

### Financial Report:

Previous balance \$1347.96

Current balance \$1257.37 (going off of last month's report, due to move treasurer book unavailable)

### Expenditures

\$8.13 pizza dinner at FRG meeting

\$54.50 pizza dinner at FRG meeting

\$27.96 drinks and food for Soldier 4 A Day

### Guest Speaker:

CYSS

- Briefed us on services of CYS

**Next Meeting:** Wednesday, November 2<sup>nd</sup> at 5:45 at Chapel.

# FRG Meeting Sign In

**Topic:**

**Meeting Date:**

Name (Printed)	Service Member Name	Relation	Phone	Email

Name (Optional):	Date:	Location:
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What New Information Did You Learn Today?

What Would You Like More Information On?

Suggestions to Improve Future Meetings.

Do you have any immediate questions or concerns that you would like us to answer?
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Question:	
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Question:	
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Please Provide your name and contact information where you would like us to respond:

Please let us know if you would like follow up regarding any of the information covered in this training. We hope you valued this training and are able to use what was taught today.
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## ACTIVITY CHECKLIST

<i>Activity</i>	<i>Date Completed</i>
Develop Plan of Action	
Approval of Commander	
Volunteers to Help	
Volunteer Agreement — Signed and on File	
Budget Planned for Activity	
Approval for Use of Site for Activity	
Alternate Plan	
Timeline (Date for Completion)	
Public Awareness (Advertising if Required)	
Facility Usage (Armory or other Site)	
Task Assignments (given to teams or individuals)	
Child/Elder/Adult Care	
Other	
Evaluations (complete evaluation forms)	
Recognize Volunteers and Supporters	

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## OPERATIONS

### Deployment Cycle



Deployment Cycle Stage	Recommended Topics	Overview	Suggested Provider/Speaker
Pre-deployment	Family Preparation Academy <i>(In lieu of meeting)</i>	A one day program designed to empower and resource Soldiers and family members to address the effects of combat operational stress and general issues prior to deploying.	DCS, BN and unit leadership, FRG, FRSA and various outside provider stations
Pre-deployment	Organizing the FRG	Invite Loved Ones to learn about the FRG and volunteer opportunities. While it is critical to recruit volunteers, it can be helpful to have a meeting to cover details.	Unit and FRG Leader, FRSA
Pre-deployment	"Preparing Children for an Upcoming Deployment"	Offered by the MFLC. Focuses on how to talk with kids of all ages and how to help them understand what a deployment means for them.	Local Military Family Life Consultant (MFLC)
Pre-deployment*	Media awareness	Advise families on how to respond, discuss social networking and OPSEC.	Unit and FRG Leader. Could also request assistance from FRSA or PAO.
Pre-deployment*	Personal Safety and Discussion of Family & Single Soldier check list	Many difficult situations can be avoided by planning ahead - Power of Attorney (POA), acct numbers, doctor, dentist, eye care info, etc.	Unit and FRG Leadership, local Police
Pre-deployment	Effective Communication	Discussion of positive communication during deployment and the various styles of communication.	Communication expert or community member.
Pre-deployment	Finances & How to read a LES (Leave and Earning Statement)	How deployment affects pay, lag in pay, how to read a LES.	Unit rep who is comfortable explaining a LES and fielding questions.
Pre-deployment*	Resource Fair	Families receive pertinent information regarding Tricare, FAC, ESGR, MOS, MFLC, etc.	Local FAC and/or service providers
Mobilization Station*	CAO/CNO Process, Wounded Warrior	This topic is best presented after soldiers leave home but before they are in a combat zone. The speaker will discuss the process and provide an overview of their program and hold a Q & A.	Casualty Affairs Liaison
Mobilization Station *	"Black-outs" & Communication (CMD vs. FRG updates)	What to expect during a blackout. This is a good opportunity to emphasize that the FRG will not communicate information unless directed by their CMD.	Previously deployed Rear Det Staff
Mobilization Station *	Red Cross/Emergency Leave	Overview of American Red Cross emergency services that help keep military personnel in touch with their families.	Red Cross Staff/Volunteer
Deployment*	Military One Source (MOS)	Overview of website and resources available to families.	MOS Rep or individual who has completed the train the trainer course.
Deployment	Leave/Pass requirements	Expectation of soldier during leave	Unit rep
Deployment*	Coping with deployments	Provide recommendations/best practices/strategies for coping with deployments.	Local Military Family Life Consultant (MFLC)
Deployment*	Psychological First Aid	<i>Coping with Deployments: Psychological First Aid for Military Families</i> is a training developed specifically to help military family members respond to the stress and strain surrounding the deployment of a loved one.	Red Cross Staff/Volunteer
Deployment	Getting through the Holidays	Discuss potential challenges and strategies families can use throughout the holidays.	Unit and FRG Leader, FRSA, MOS resources
Deployment*	Suicide prevention	Overview of suicide prevention programs, services.	Chaplain, VA or DCS Advocacy Rep
Deployment*	Relationship building/rebuilding	Focus on communication, expectations, problem solving etc. Also, promote Strong Bonds.	Chaplain or MFLC
Deployment	Family Reintegration Academy (FRA) <i>(In lieu of meeting)</i>	The Family Reintegration Academy prepares family members for their Soldier's homecoming and informs them what they can do to make the transition go smoothly. Held approximately a month prior to the return of the Soldiers.	DCS, BN and unit leadership, FRG, FRSA and various outside provider stations

## Deployment Resources

Topic	Website	Topic	Website
AAFES	<a href="http://www.aafes.com">www.aafes.com</a>	Military Money	<a href="http://www.incharge.org/military-money">http://www.incharge.org/military-money</a>
American Red Cross	<a href="http://www.redcross.org">www.redcross.org</a>	Military One Source	<a href="http://www.militaryonesource.mil">www.militaryonesource.mil</a>
Air Force Reserve	<a href="http://www.afrc.af.mil">www.afrc.af.mil</a>	Military Scholar	<a href="http://www.militaryscholar.org">www.militaryscholar.org</a>
Air Force Heart Link	<a href="https://www.usafservices.com/Home/SpouseSupport/HeartlinkTraining.aspx">https://www.usafservices.com/Home/SpouseSupport/HeartlinkTraining.aspx</a>	Military Student	<a href="http://www.militarystudent.org">www.militarystudent.org</a>
Air National Guard	<a href="http://www.ang.af.mil">www.ang.af.mil</a>	Military Wives	<a href="http://spousebuzz.com/">http://spousebuzz.com/</a> <a href="http://www.veteransunited.com/spouse/">http://www.veteransunited.com/spouse/</a>
Army Emergency Relief	<a href="http://www.aerhq.org">www.aerhq.org</a>	Moms of Service Members	<a href="http://www.bluestarmothers.org/">http://www.bluestarmothers.org/</a>
Army Family Team Building	<a href="http://www.myarmyonesource.com">www.myarmyonesource.com</a>	Military.com	<a href="http://www.military.com">www.military.com</a>
Army Reserve	<a href="http://www.usar.army.mil">www.usar.army.mil</a>	Moms over Miles	<a href="http://www.momsovermiles.com">www.momsovermiles.com</a>
Army Reserve Family Programs – Fort Family	<a href="http://www.arfp.org/index.php/programs/fort-family-outreach-and-support">www.arfp.org/index.php/programs/fort-family-outreach-and-support</a>	National Guard	<a href="http://www.nationalguard.mil/">http://www.nationalguard.mil/</a>
Dads at a Distance	<a href="http://www.daads.com">www.daads.com</a>	National Guard Family Programs	<a href="https://www.jointservicessupport.org/FP/Default.aspx">https://www.jointservicessupport.org/FP/Default.aspx</a>
DECA Commissaries	<a href="http://www.commissaries.com">www.commissaries.com</a>	National Military Association	<a href="http://www.nmfa.org">www.nmfa.org</a>
Defense Finance and Accounting	<a href="http://www.dfas.mil">www.dfas.mil</a>	Navy Life Skills Program	<a href="http://www.cnic.navy.mil/ffr/family_readiness/fleet_and_family_support_program.html">http://www.cnic.navy.mil/ffr/family_readiness/fleet_and_family_support_program.html</a>
Deployment Information	<a href="http://afterdeployment.t2.health.mil/">http://afterdeployment.t2.health.mil/</a>	Navy Reserve	<a href="https://www.navyreserve.navy.mil/Pages/default.aspx">https://www.navyreserve.navy.mil/Pages/default.aspx</a>
Defense Centers of Excellence	<a href="http://www.dcoe.health.mil">http://www.dcoe.health.mil</a>	Operation Military Kids	<a href="http://www.nifa.usda.gov/nea/family/part/youthdev_part_military.html">http://www.nifa.usda.gov/nea/family/part/youthdev_part_military.html</a>
DOD Mobilization Guide	<a href="http://www.militaryonesource.mil/12038/Project%20Documents/MilitaryHOMEFRONT/Troops%20and%20Families/Deployment%20Connections/Pre-Deployment%20Guide.pdf">http://www.militaryonesource.mil/12038/Project%20Documents/MilitaryHOMEFRONT/Troops%20and%20Families/Deployment%20Connections/Pre-Deployment%20Guide.pdf</a>	OSD Reserve Affairs	<a href="http://ra.defense.gov">http://ra.defense.gov</a>
Employment Support for Guard and Reserve	<a href="http://www.esgr.org">www.esgr.org</a>	Parents of Service Members	<a href="http://www.operationwearehere.com/Parents.html">http://www.operationwearehere.com/Parents.html</a> <a href="http://www.survivingdeployment.com/parents.html">http://www.survivingdeployment.com/parents.html</a>
Financial Readiness	<a href="http://www.militaryonesource.mil/pfm">http://www.militaryonesource.mil/pfm</a>	Spirit of America	<a href="http://www.spiritofamerica.net">www.spiritofamerica.net</a>
Joint Service Support	<a href="https://www.jointservicessupport.org/">https://www.jointservicessupport.org/</a>	Surviving Deployment	<a href="http://www.survivingdeployment.com/index.html">http://www.survivingdeployment.com/index.html</a>
Coast Guard Reserve	<a href="http://www.uscg.mil/reserve">www.uscg.mil/reserve</a>	Taxes (IRS)	<a href="http://www.irs.gov">www.irs.gov</a>
Marines	<a href="http://www.marines.mil">www.marines.mil</a>	Thrift Savings Plan	<a href="http://www.tsp.gov">www.tsp.gov</a>
Military Child Education Coalition	<a href="http://www.militarychild.org/">http://www.militarychild.org/</a>	Tricare Reserve Information	<a href="http://www.tricare.osd.mil/reserve">www.tricare.osd.mil/reserve</a>
Military Living	<a href="http://www.militaryliving.com">www.militaryliving.com</a>	US Army	<a href="http://www.army.mil">www.army.mil</a>
Military Family Network	<a href="http://www.emilitary.org">www.emilitary.org</a>	Veterans Administration	<a href="http://www.va.gov">www.va.gov</a>
Marine Corps Family Team Building	<a href="http://www.mccsmcrd.com/MarineAndFamilyPrograms/MarineCorpsFamilyTeamBuilding/index.html">http://www.mccsmcrd.com/MarineAndFamilyPrograms/MarineCorpsFamilyTeamBuilding/index.html</a>	Yellow Ribbon Reintegration Program	<a href="http://www.yellowribbon.mil/event_support.html">http://www.yellowribbon.mil/event_support.html</a>



# The Emotional Cycle of Deployment

What's Going On ...	Feelings	Coping Strategies
<b>Anticipation of Departure</b>		
<ul style="list-style-type: none"> <li>Denial and anticipation of loss</li> <li>Increased feeling of stress in home</li> <li>Frequency of arguments increase</li> <li>Reality of change ahead is “sinking in”</li> <li>Focus is on completing family pre-deployment activity checklist</li> <li>Members may feel more emotional</li> <li>In case of multiple deployments ... new cycle may begin before family has had time to renegotiate new normal from last deployment</li> <li>Children: decide when to tell them about the deployment</li> </ul>	<ul style="list-style-type: none"> <li>Anger</li> <li>Resentful</li> <li>Guilt</li> <li>Restlessness</li> <li>Depression</li> <li>Irritability</li> <li>Sadness</li> <li>Fear</li> <li>Anxiety</li> </ul>	<ul style="list-style-type: none"> <li>Communicate (ask questions, listen to each other)</li> <li>Discuss deployment expectations</li> <li>Communicate “quality time” availability to family</li> <li>Discuss deployment with children</li> <li>Sharing feelings</li> <li>Planning and setting boundaries are the keys to managing the time leading up to the deployment</li> </ul>
<b>Detachment and Withdrawal</b>		
<ul style="list-style-type: none"> <li>Service Member is focused on preparing for mission and may distance self from family</li> <li>Anger, arguments may occur as family prepares to protect themselves from “hurt” of separation</li> <li>Communication may be difficult</li> <li>Experience lack of energy</li> <li>Increased difficulty making decisions</li> <li>In preparation for loss, family may begin to act like Service Member is already gone</li> <li>Multiple deployments can result in need to repeatedly create distance; to feel “numb” and avoid emotional connection</li> <li>Children: actual good-bye is important</li> </ul>	<ul style="list-style-type: none"> <li>Sadness</li> <li>Despair</li> <li>Hopelessness</li> <li>Anger</li> <li>Irritability</li> <li>Withdrawal</li> </ul>	<ul style="list-style-type: none"> <li>Dedicate time to spend with family members</li> <li>Be empathetic</li> <li>Include family, when possible, in pre-deployment activities</li> <li>Reassure each other you will be ok</li> <li>Develop and turn to support networks</li> <li>Be patient that Service Member may be spending more time at work</li> <li>Reassure children that the Service Member will return</li> </ul>
<b>Emotional Disorganization</b>		
<ul style="list-style-type: none"> <li>Life without Service Member may initially feel overwhelming</li> <li>Routines change, responsibilities added</li> <li>May feel ... <ul style="list-style-type: none"> <li>Numb and not interested in doing much</li> <li>Have difficulty concentrating</li> <li>Wish things would go back to “normal”</li> <li>Surprised because things seem to be moving smoothly now that Service Member is gone</li> </ul> </li> <li>Experience sleep difficulty</li> <li>Anxious about security issues</li> <li>Children: take cue from parent</li> </ul>	<ul style="list-style-type: none"> <li>Relief</li> <li>Sadness</li> <li>Lonely, frustrated</li> <li>Restless</li> <li>Confused</li> <li>Disorganized</li> <li>Indecisive</li> <li>Irritable</li> <li>Unmotivated</li> <li>Overwhelmed</li> </ul>	<ul style="list-style-type: none"> <li>Establish your deployment routine</li> <li>Get involved</li> <li>Stay in contact with other family members</li> <li>Establish a connection with Service Member</li> <li>Stay in contact with support network</li> <li>Set Goals</li> <li>Start a hobby</li> <li>Get a job</li> <li>Volunteer</li> </ul>
<b>Recovery and Stabilization</b>		
<ul style="list-style-type: none"> <li>Family finally starts to settle into routine of life without Service Member</li> <li>Coping with changes can be positive <ul style="list-style-type: none"> <li>May enjoy new found responsibilities</li> <li>Sense of independence, confidence</li> <li>Relief that family is functioning well</li> </ul> </li> <li>Coping with changes can be challenging <ul style="list-style-type: none"> <li>Difficult time accepting changes</li> <li>Stressed, depressed, and having difficulty getting things done</li> <li>Feel unsupported and worried how will make it through</li> </ul> </li> <li>Most of the time there is a mixture of both responses.</li> <li>Children: clingy, sleep disturbances, eating difficulties; crankiness, drop in academics; acting out, self-criticism, loss of interest</li> </ul>	<ul style="list-style-type: none"> <li>Mildly depressed</li> <li>Anxious</li> <li>Vulnerable</li> <li>Fear</li> <li>Emotional</li> </ul>	<ul style="list-style-type: none"> <li>Maintain a routine</li> <li>Work toward goals</li> <li>Keep communication going</li> <li>Use support network</li> <li>Take care of yourself</li> <li>Choose a positive attitude</li> <li>Keep things in perspective</li> <li>Be flexible</li> <li>Model positive coping skills for children</li> </ul>

## The Emotional Cycle of Deployment

What's Going On ...	Feelings	Coping Strategies
<b>Anticipation of Return</b>		
<ul style="list-style-type: none"> <li>• Homecoming is coming!</li> <li>• Family is happy, excited, and feeling boost of energy</li> <li>• Trying to make everything "perfect" for return</li> <li>• Sense of relief that Service Member will be home combined with worries about whether or not they will be the same</li> <li>• Children: when to tell them of return?</li> </ul>	<ul style="list-style-type: none"> <li>• Excitement</li> <li>• Apprehension</li> <li>• Nervousness</li> <li>• Restlessness</li> <li>• Irritability</li> <li>• Anxiousness</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss plans for reunion</li> <li>• Set realistic expectations</li> <li>• Communicate expectations to family and friends</li> <li>• Remember Service Member must remain mission focused</li> </ul>
<b>Return Adjustment and Renegotiation</b>		
<ul style="list-style-type: none"> <li>• During time of separation Service Member and all family members have changed</li> <li>• Changes may hold pleasant surprises or may cause conflict</li> <li>• Family members may feel overwhelmed by Service Member attempts to get to know everyone again</li> <li>• Everyone needs space and time to readjust</li> <li>• Family member may feel loss of independence</li> <li>• Entire family must begin to renegotiate how household will look now that everyone is together again</li> <li>• Service Member may need time to assimilate back</li> <li>• Children: different reactions depending on ages</li> </ul>	<ul style="list-style-type: none"> <li>• Relief</li> <li>• Happiness</li> <li>• Contentment</li> <li>• Irritability</li> <li>• Guarded</li> <li>• Resentment</li> <li>• Overwhelmed</li> <li>• Frustration</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate</li> <li>• Be patient</li> <li>• Negotiate and compromise</li> <li>• Be willing to give up/take on different responsibilities</li> <li>• Keep emotions under control</li> <li>• Sit down and negotiate roles and responsibilities</li> <li>• Be aware of signs of combat stress</li> </ul>
<b>Reintegration and Stabilization</b>		
<ul style="list-style-type: none"> <li>• Family continues to adjust to having Service Member home</li> <li>• This could last for months!</li> <li>• A "new normal" is established regarding routines and expectations</li> <li>• Members may begin to feel secure, relaxed, and comfortable with one another again</li> <li>• If readjustment challenges resurface, support is important ... It's okay to ask for help if you need it!</li> </ul>	<ul style="list-style-type: none"> <li>• Appreciation</li> <li>• Supportive</li> <li>• Comfortable</li> </ul>	<ul style="list-style-type: none"> <li>• Be patient</li> <li>• Communicate</li> <li>• Take it slow</li> <li>• Lower expectations</li> <li>• Taking time to get to know each other again</li> <li>• Re-negotiate if necessary</li> </ul>

**NOTES:**

# Family Deployment Checklist

Although extended deployments are never easy on the Family, the hardships need not be increased by failure to plan ahead. A carefully prepared and executed pre-deployment checklist can save you and your Family from giant headaches in the future. It is very important for you, as a Military Family, to have certain documents in your possession. Military Family Members are often required to take over the Family during the sponsor's absence; therefore, it is important that both of you sit down together to gather information and documents named in this checklist. You are encouraged to keep originals or copies of all listed documents in a special container (safety deposit box) in a location you can find immediately and is known to both you and the sponsor.

\_\_\_\_\_ Marriage Certificate.

\_\_\_\_\_ Birth Certificates of all Family members:

\_\_\_\_\_ Wife

\_\_\_\_\_ Husband

\_\_\_\_\_ Children \_\_\_\_\_

\_\_\_\_\_ Divorce Papers

\_\_\_\_\_ Death Certificates

\_\_\_\_\_ Medical (Shot) and Dental Records of all Family members (including pets)

\_\_\_\_\_ Citizenship/Naturalization papers

\_\_\_\_\_ Adoption Papers

\_\_\_\_\_ Passports, Visas (remove only when needed for international travel)

\_\_\_\_\_ Insurance policies (Note: Company, Policy # and Amount of Payment)

\_\_\_\_\_ Real Estate Documents (leases, mortgages, deeds, or promissory notes)

\_\_\_\_\_ Copies of installment contracts and loan papers

\_\_\_\_\_ Current list of immediate next of kin, personal lawyer, trusted friend (include phone # and address)

\_\_\_\_\_ Power of attorney

**GENERAL:** Allows holder to act in all matters on sponsor's behalf

**SPECIAL:** Allows holder to act on sponsor's behalf in special transactions.

**MEDICAL:** Authorizes holder to obtain medical care for Family members under 18 years of age.

\_\_\_\_\_ Wills for both spouses

\_\_\_\_\_ Orders

\_\_\_\_\_ Copy of Emergency Data Card

\_\_\_\_\_ List of all credit cards and account numbers

\_\_\_\_\_ AAFES Deferred Payment Plan (DPP), (to use, spouse must be listed as an authorized user or hold sponsor's General Power of Attorney).

\_\_\_\_\_ Federal and State Income Tax Returns (last 5 years)

\_\_\_\_\_ Car title (registration should be in car)

\_\_\_\_\_ Last LES (Leave Earning Statement)

\_\_\_\_\_ Discharge papers (DD Form 214)

\_\_\_\_\_ Allotments (Updated with correct amount, name, address, account #)

\_\_\_\_\_ Social Security Number of each Family member

\_\_\_\_\_ Current address and telephone numbers of immediate Family members of both spouses.

**The Following Should be Completed Prior to Deployment**

\_\_\_\_\_ Next of kin informed of rights, benefits, and assistance available

\_\_\_\_\_ Family budget and business arranged (See Financial Section for Budget Worksheet)

\_\_\_\_\_ Emergency Data Card updated in Military Personnel Record

\_\_\_\_\_ Joint checking/savings account arranged (List-all account numbers)

\_\_\_\_\_ Parents informed of how to make contact in case of emergency

\_\_\_\_\_ Armed Forces ID Cards (Renew if ID Card expires within next 3 months. Rear Detachment Commander can sign for ID Replacement after Soldier deploys)

\_\_\_\_\_ Emergency services explained and located:

\_\_\_\_\_ Red Cross/ Army Emergency Relief (AER)

\_\_\_\_\_ Medical facilities/TRICARE

\_\_\_\_\_ Army Community Service (ACS)

\_\_\_\_\_ Legal Assistance Office

\_\_\_\_\_ Security check on house

\_\_\_\_\_ Problems with cars, household, and appliances identified and resolved

## **HOUSE CARE CHECKLIST**

Take a 10-minute walk through your house. Carry this checklist to help you truly see your home. The idea behind this walk is to look for fire hazards. You don't have any? Are you sure? Perhaps this list will change your mind.

### **KITCHEN:**

**YES/NO**

Are curtains, dishtowels, or paper items kept away from stove? \_\_\_\_\_

Is stove's exhaust hood and ductwork clean of grease? \_\_\_\_\_

Do you have a working fire extinguisher close at hand? \_\_\_\_\_

### **LIVING ROOM. DINING ROOM. BEDROOMS:**

Is fireplace spark screen always closed? \_\_\_\_\_

Is electrical wiring/circuits/outlets adequate to handle load? \_\_\_\_\_

Is there sufficient space for air circulation around TV/stereo? \_\_\_\_\_

Are ashtrays available in home occupied by smokers? \_\_\_\_\_

Are matches and lighters out of reach of children? \_\_\_\_\_

### **ATTIC, CLOSETS. STORAGE ROOM:**

Do you keep oily cleaning rags in tight metal containers? \_\_\_\_\_

Are you using only nonflammable cleaning fluids? \_\_\_\_\_

Do you avoid accumulations of paper and combustible materials? \_\_\_\_\_

### **WORKSHOP:**

**YES/NO**

Are combustible materials kept away from heat sources? \_\_\_\_\_

Are paint thinners, paints, and solvents kept in their original containers for identification purposes? \_\_\_\_\_

Are the furnace, heaters, vents and chimneys inspected and serviced regularly? \_\_\_\_\_

Are fuses of the proper size for the circuits they protect? \_\_\_\_\_

Are the dryer lint trap and vent kept clean? \_\_\_\_\_

### **GARAGE. GROUNDS:**

Is gasoline for the mower stored in a safety can? \_\_\_\_\_

Have you removed accumulations of trash and paper? \_\_\_\_\_

Are oil-soaked rags in tight metal containers to prevent combustion? \_\_\_\_\_

Do you use commercial starter fuels (not gasoline) for barbecue fires and are Barbecue mitts ember-proof? \_\_\_\_\_

Are there dry leaves under porches or wooden stairs, in window sills, or anywhere else close to the house? \_\_\_\_\_

### **SELF CHECK:**

Do you know where the electrical box (fuse/circuit box) is and how to replace fuses? \_\_\_\_\_

Do you know the location and procedure of shutting off water/gas Master Control valves in case of broken or leaking pipes? \_\_\_\_\_

Do you inspect electrical cords frequently and keep them in good condition? \_\_\_\_\_

Do you use extension cords only for temporary convenience, never as permanent wiring? \_\_\_\_\_

Do you enforce a "NO SMOKING IN BED" rule? \_\_\_\_\_

Do you and your Family avoid using hair spray near open flames or while smoking? \_\_\_\_\_

Does everyone in the Family know how to call the fire department or dial the operator? \_\_\_\_\_

Does each telephone have the fire, police, and ambulance numbers close to it? \_\_\_\_\_

Does your Family have a fire escape plan and has your Family drilled with it? \_\_\_\_\_

Do you make sure your children are not left unattended and instruct baby sitters about emergency procedures? \_\_\_\_\_

**NOW IT IS TIME TO ADD UP YOUR ANSWERS.** To how many of the questions did you answer "NO" to one or two? Your home is fairly fire safe. But remember, just one can cause a tragedy! If you had 5 or 6, you are risking the safety of your Family. If you have more than 6, you are asking for trouble. **Take action NOW!**

### **SMOKE DETECTORS**

Buy a battery-operated smoke detector. It is one of the best and most inexpensive forms of fire insurance. It will not prevent a fire from starting, but it may save your life! Be sure to check the smoke detector on a regular basis.

### **HOME TOOL KIT**

\_\_\_\_\_ Flashlight and extra batteries  
\_\_\_\_\_ Assorted Nails, screws and tacks  
\_\_\_\_\_ Masking Tape  
\_\_\_\_\_ Pliers  
\_\_\_\_\_ Furnace Filters

\_\_\_\_\_ Hammer  
\_\_\_\_\_ Screwdrivers  
\_\_\_\_\_ Scissors and/or knife  
\_\_\_\_\_ Wrench  
\_\_\_\_\_ Extra light bulbs

### **FINANCIAL**

\_\_\_\_\_ Who will have the checkbook and who will have the cash card? Remember it will take a week or longer for mail to be forwarded to the spouse's new duty station. Plan on paying bills timely.

\_\_\_\_\_ What types of accounts does the Family have with what banks? Do the current accounts allow Family members access to funds?

\_\_\_\_\_ Where are the bankbooks and account numbers?

\_\_\_\_\_ Are all the credit card numbers written down and in a safe place? Are the numbers and company addresses recorded in case of loss or theft?

\_\_\_\_\_ Are you knowledgeable about check writing? How will you determine if there are insufficient funds and what is your plan in case this happens? Do you need to sign up for financial management training?

\_\_\_\_\_ If allotments or check to the bank are delayed who can you contact?

## *Emergency Notification Information*

Soldier's Correct Full Name: \_\_\_\_\_

Soldier's Rank and Pay Grade: \_\_\_\_\_

Soldier's Social Security Number: \_\_\_\_\_

Soldier's Unit: \_\_\_\_\_

Soldier's Unit Address: \_\_\_\_\_

Name of Exercise Soldier is on: \_\_\_\_\_

Full Name of Ill, Injured, or Deceased Person: \_\_\_\_\_

Relationship of Person Shown Above to Soldier: \_\_\_\_\_

What Hospital or Funeral Home is Person in: \_\_\_\_\_

Who is the Doctor Treating the Person: \_\_\_\_\_

Family Member who can Provide Additional Information: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Family/Doctor Wants Soldier to: Be Notified Only: \_\_\_\_\_ Come Home: \_\_\_\_\_

Leave Address Soldier Should Go To Is:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

The Soldier will Need About \_\_\_\_\_ Days to Resolve the Problem

**THE ABOVE INFORMATION MAY HELP SPEED THE SERVICE MEMBER'S RETURN. WHEN YOU CONTACT A LOCAL RED CROSS OFFICE, BE SPECIFIC!**

## Red Cross Notification

*(To be filled out by service member and sent home)*

Dear Family in the United States:

In the event you need to contact me quickly or need my presence at home, you must contact the American Red Cross (ARC) in your local community before I can receive permission to come home. A message from the American Red Cross is required before I can get the documents for transportation on military aircraft and/or commercial aircraft, and for leave authorization.

Following is the information that you should provide the local American Red Cross to contact me:

- My Social Security Number: \_\_\_\_\_
- My full name: \_\_\_\_\_
- My rank is: \_\_\_\_\_
- My mailing address is: \_\_\_\_\_
- My duty station is: \_\_\_\_\_
- My duty telephone is: \_\_\_\_\_
- My residence address is: \_\_\_\_\_
- My home telephone number is: \_\_\_\_\_

In addition, they will request some detailed information as to the nature of the emergency. At a minimum, you will need to know the name and address of the doctor, hospital, plus a statement as to why I am needed. I realize in case of death or critical illness in the Family that you would want to call me directly, but you must also contact the Red Cross to authorize and expedite travel arrangements. You can contact the Red Cross 24 hours a day and there is no charge for this service.

**Red Cross Emergency Service Center (Toll-Free):** \_\_\_\_\_

Please place this document in the telephone book so that you can easily find it in case you need to contact me. This procedure applies regardless if I am deployed or at my home station. You might want to take some time to write down the local American Red Cross chapter in your community so that in an emergency you will not have to look it up.

**Local American Red Cross Address:** \_\_\_\_\_

**Local American Red Cross Telephone Number:** \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_



# REAL: Readiness Essentials for Army Leaders

## OPERATIONS

Informal Fund/ Fundraising



[Unit Letterhead]

Office Symbol

[Date]

MEMORANDUM FOR RECORD

SUBJECT: Authorization to open a new business checking account for the  
\_\_\_\_\_ Family Readiness Group (FRG) Fund

1. The command authorizes a bank account to be opened at (Bank Name, address, city, state zip). The account is to be a non-interest bearing checking account for (Unit FRG).

2. This memorandum is to authorize the following named individuals to open an account and/or update the signature card on the account. The IRS Employee Identification Number for this group is: (EIN #). The mailing address is: c/o \_\_\_\_\_, Address, City, State, ZIP. Authorized signatories on this account are listed below with their titles:

(Name) FRG Treasurer

(Name) Alternate Treasurer

3. If there are any questions, please contact the undersigned at (phone number). Thank you for your assistance.

Sincerely,

[COMMANDER'S NAME]  
[Rank], [Branch]  
Commanding

**Unit Letterhead**

Date \_\_\_\_\_

MEMORANDUM FOR (Bank Information)

SUBJECT: Authorized Signers  
(Unit Name) FRG Account  
Account # \_\_\_\_\_

Dear Sir or Madam,

1. I hereby authorize the following individuals to act as signers on the above referenced account:

- \_\_\_\_\_ NAME \_\_\_\_\_, Social Security Number \_\_\_\_-\_\_-\_\_\_\_, as FRG Informal Fund Custodian.
- \_\_\_\_\_ NAME \_\_\_\_\_, Social Security Number \_\_\_\_-\_\_-\_\_\_\_, as Alternate FRG Informal Fund Custodian.

1. Please delete all previous authorized signers.

2. Electronic bank statements are authorized to be sent to the following e-mail addresses: [unitcommander@gmail.com](mailto:unitcommander@gmail.com) and [informalfundcustodian@gmail.com](mailto:informalfundcustodian@gmail.com).

3. This authorization is effective upon receipt. The Point of Contact for this document is the undersigned at (\_\_\_\_) \_\_\_\_-\_\_\_\_.

Sincerely,

NAME  
RANK, BRANCH  
Commanding

## Applying for an EIN (Employer Identification Number) For FRG Bank Account

<https://sa1.www4.irs.gov/modiein/individual/index.jsp> OR [www.irs.gov](http://www.irs.gov)

### Choose type you are applying for

1. View additional types
2. Government, Federal/ military

**Continue**

### Confirm your selection

Confirm your selection of **Government, Federal/Military** as the type of structure applying for an EIN.

#### What it is...

- The federal government includes all branches of the federal government system, such as the departments of: Treasury, Interior, Defense, etc. Military organizations include officers' clubs, enlisted men's clubs, NCO clubs, billeting funds, etc. All federal government/military agencies are direct employees of the federal government.

**Continue**

### Reason applying for EIN

- Banking purposes

### Responsible person

- (Unit Commander and SSN)
- I am a duly authorized member, officer, or employee of the organization or government entity.

**Continue**

### Fill in information

- Duly authorized member of the organization

### Address: Unit Address

- \_ Company, \_ BN FRG
- Street Address
- City
- State, Zip Code

### Mail directed to specific department

- \_ Company, \_ BN FRG

### Different address to send mail

- No

### Physical location not found

- Accept as entered

### Tell us about Government/ military

- Legal: \_ Company, \_ BN FRG
- County:
- Start Date:

### Tell us more about Government/ military

- Answer **No** to all questions

### What does organization do?

- Other
- Other: Family Readiness Group

### Receive Letter online

### Review Summary of your information

### Print Summary page

### Submit

### Follow the rest of the instructions

#### **NOTE:**

1. Please submit copy of EIN document to the appropriate Point of Contact for your command
2. Maintain document in Treasurer book

**Note:** Form SS-4 begins on the next page of this document.

### **Change to Domestic Employer Identification Number (EIN) Assignment by Toll-Free Phones**

Beginning January 6, 2014, the IRS will refer all domestic EIN requests received by toll-free phones to the EIN Online Assistant. You can access the Assistant by going to [www.irs.gov](http://www.irs.gov), entering "EIN" in the "Search" feature and following instructions for applying for an EIN online.

### **Attention Limit of one (1) Employer Identification Number (EIN) Issuance per Business Day**

Effective May 21, 2012, to ensure fair and equitable treatment for all taxpayers, the Internal Revenue Service (IRS) will limit Employer Identification Number (EIN) issuance to one per responsible party per day. For trusts, the limitation is applied to the grantor, owner, or trustor. For estates, the limitation is applied to the decedent (decedent estate) or the debtor (bankruptcy estate). This limitation is applicable to all requests for EINs whether online or by phone, fax or mail. We apologize for any inconvenience this may cause.

### **Change to Where to File Address and Fax-TIN Number**

There is a change to the Instructions for Form SS-4 (Rev. January 2011). On page 2, under the "Where to File or Fax" table, the address and Fax-TIN number have changed. If you are applying for an Employer Identification Number (EIN), and you have no legal residence, principal place of business, or principal office or agency in any state or the District of Columbia, file or fax your application to:

Internal Revenue Service Center  
Attn: EIN International Operation  
Cincinnati, OH 45999  
Fax-*TIN*: 859-669-5987

This change will be included in the next revision of the Instructions for Form SS-4.

# Application for Employer Identification Number

OMB No. 1545-0003

(For use by employers, corporations, partnerships, trusts, estates, churches, government agencies, Indian tribal entities, certain individuals, and others.)

EIN

▶ See separate instructions for each line. ▶ Keep a copy for your records.

<b>Type or print clearly.</b>	<b>1</b> Legal name of entity (or individual) for whom the EIN is being requested				
	<b>2</b> Trade name of business (if different from name on line 1)	<b>3</b> Executor, administrator, trustee, "care of" name			
	<b>4a</b> Mailing address (room, apt., suite no. and street, or P.O. box)	<b>5a</b> Street address (if different) (Do not enter a P.O. box.)			
	<b>4b</b> City, state, and ZIP code (if foreign, see instructions)	<b>5b</b> City, state, and ZIP code (if foreign, see instructions)			
	<b>6</b> County and state where principal business is located				
	<b>7a</b> Name of responsible party	<b>7b</b> SSN, ITIN, or EIN			
<b>8a</b> Is this application for a limited liability company (LLC) (or a foreign equivalent)? <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>8b</b> If 8a is "Yes," enter the number of LLC members ▶				
<b>8c</b> If 8a is "Yes," was the LLC organized in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No					
<b>9a</b> <b>Type of entity</b> (check only one box). <b>Caution.</b> If 8a is "Yes," see the instructions for the correct box to check.					
<input type="checkbox"/> Sole proprietor (SSN) _____ <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation (enter form number to be filed) ▶ _____ <input type="checkbox"/> Personal service corporation <input type="checkbox"/> Church or church-controlled organization <input type="checkbox"/> Other nonprofit organization (specify) ▶ _____ <input type="checkbox"/> Other (specify) ▶ _____					
<input type="checkbox"/> Estate (SSN of decedent) _____ <input type="checkbox"/> Plan administrator (TIN) _____ <input type="checkbox"/> Trust (TIN of grantor) _____ <input type="checkbox"/> National Guard <input type="checkbox"/> State/local government <input type="checkbox"/> Farmers' cooperative <input type="checkbox"/> Federal government/military <input type="checkbox"/> REMIC <input type="checkbox"/> Indian tribal governments/enterprises <input type="checkbox"/> Group Exemption Number (GEN) if any ▶ _____					
<b>9b</b> If a corporation, name the state or foreign country (if applicable) where incorporated	State	Foreign country			
<b>10</b> <b>Reason for applying</b> (check only one box)					
<input type="checkbox"/> Started new business (specify type) ▶ _____ <input type="checkbox"/> Hired employees (Check the box and see line 13.) <input type="checkbox"/> Compliance with IRS withholding regulations <input type="checkbox"/> Other (specify) ▶ _____					
<input type="checkbox"/> Banking purpose (specify purpose) ▶ _____ <input type="checkbox"/> Changed type of organization (specify new type) ▶ _____ <input type="checkbox"/> Purchased going business <input type="checkbox"/> Created a trust (specify type) ▶ _____ <input type="checkbox"/> Created a pension plan (specify type) ▶ _____					
<b>11</b> Date business started or acquired (month, day, year). See instructions.	<b>12</b> Closing month of accounting year				
<b>13</b> Highest number of employees expected in the next 12 months (enter -0- if none). If no employees expected, skip line 14.	<b>14</b> If you expect your employment tax liability to be \$1,000 or less in a full calendar year <b>and</b> want to file Form 944 annually instead of Forms 941 quarterly, check here. (Your employment tax liability generally will be \$1,000 or less if you expect to pay \$4,000 or less in total wages.) If you do not check this box, you must file Form 941 for every quarter. <input type="checkbox"/>				
<table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:33%; border-right: 1px solid black;">Agricultural</td> <td style="width:33%; border-right: 1px solid black;">Household</td> <td>Other</td> </tr> </table>			Agricultural	Household	Other
Agricultural	Household	Other			
<b>15</b> First date wages or annuities were paid (month, day, year). <b>Note.</b> If applicant is a withholding agent, enter date income will first be paid to nonresident alien (month, day, year) ▶					
<b>16</b> Check <b>one</b> box that best describes the principal activity of your business.					
<input type="checkbox"/> Construction <input type="checkbox"/> Rental & leasing <input type="checkbox"/> Transportation & warehousing <input type="checkbox"/> Health care & social assistance <input type="checkbox"/> Wholesale-agent/broker <input type="checkbox"/> Real estate <input type="checkbox"/> Manufacturing <input type="checkbox"/> Finance & insurance <input type="checkbox"/> Accommodation & food service <input type="checkbox"/> Wholesale-other <input type="checkbox"/> Retail <input type="checkbox"/> Other (specify)					
<b>17</b> Indicate principal line of merchandise sold, specific construction work done, products produced, or services provided.					
<b>18</b> Has the applicant entity shown on line 1 ever applied for and received an EIN? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," write previous EIN here ▶					

<b>Third Party Designee</b>	Complete this section <b>only</b> if you want to authorize the named individual to receive the entity's EIN and answer questions about the completion of this form.	
	Designee's name	Designee's telephone number (include area code) ( )
	Address and ZIP code	Designee's fax number (include area code) ( )
Under penalties of perjury, I declare that I have examined this application, and to the best of my knowledge and belief, it is true, correct, and complete.		Applicant's telephone number (include area code) ( )
Name and title (type or print clearly) ▶		Applicant's fax number (include area code) ( )
Signature ▶		Date ▶

## Do I Need an EIN?

File Form SS-4 if the applicant entity does not already have an EIN but is required to show an EIN on any return, statement, or other document.<sup>1</sup> See also the separate instructions for each line on Form SS-4.

IF the applicant...	AND...	THEN...
Started a new business	Does not currently have (nor expect to have) employees	Complete lines 1, 2, 4a-8a, 8b-c (if applicable), 9a, 9b (if applicable), and 10-14 and 16-18.
Hired (or will hire) employees, including household employees	Does not already have an EIN	Complete lines 1, 2, 4a-6, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10-18.
Opened a bank account	Needs an EIN for banking purposes only	Complete lines 1-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Changed type of organization	Either the legal character of the organization or its ownership changed (for example, you incorporate a sole proprietorship or form a partnership) <sup>2</sup>	Complete lines 1-18 (as applicable).
Purchased a going business <sup>3</sup>	Does not already have an EIN	Complete lines 1-18 (as applicable).
Created a trust	The trust is other than a grantor trust or an IRA trust <sup>4</sup>	Complete lines 1-18 (as applicable).
Created a pension plan as a plan administrator <sup>5</sup>	Needs an EIN for reporting purposes	Complete lines 1, 3, 4a-5b, 9a, 10, and 18.
Is a foreign person needing an EIN to comply with IRS withholding regulations	Needs an EIN to complete a Form W-8 (other than Form W-8ECI), avoid withholding on portfolio assets, or claim tax treaty benefits <sup>6</sup>	Complete lines 1-5b, 7a-b (SSN or ITIN optional), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Is administering an estate	Needs an EIN to report estate income on Form 1041	Complete lines 1-6, 9a, 10-12, 13-17 (if applicable), and 18.
Is a withholding agent for taxes on non-wage income paid to an alien (i.e., individual, corporation, or partnership, etc.)	Is an agent, broker, fiduciary, manager, tenant, or spouse who is required to file Form 1042, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	Complete lines 1, 2, 3 (if applicable), 4a-5b, 7a-b (if applicable), 8a, 8b-c (if applicable), 9a, 9b (if applicable), 10, and 18.
Is a state or local agency	Serves as a tax reporting agent for public assistance recipients under Rev. Proc. 80-4, 1980-1 C.B. 581 <sup>7</sup>	Complete lines 1, 2, 4a-5b, 9a, 10, and 18.
Is a single-member LLC	Needs an EIN to file Form 8832, Classification Election, for filing employment tax returns and excise tax returns, or for state reporting purposes <sup>8</sup>	Complete lines 1-18 (as applicable).
Is an S corporation	Needs an EIN to file Form 2553, Election by a Small Business Corporation <sup>9</sup>	Complete lines 1-18 (as applicable).

<sup>1</sup> For example, a sole proprietorship or self-employed farmer who establishes a qualified retirement plan, or is required to file excise, employment, alcohol, tobacco, or firearms returns, must have an EIN. A partnership, corporation, REMIC (real estate mortgage investment conduit), nonprofit organization (church, club, etc.), or farmers' cooperative must use an EIN for any tax-related purpose even if the entity does not have employees.

<sup>2</sup> However, do not apply for a new EIN if the existing entity only (a) changed its business name, (b) elected on Form 8832 to change the way it is taxed (or is covered by the default rules), or (c) terminated its partnership status because at least 50% of the total interests in partnership capital and profits were sold or exchanged within a 12-month period. The EIN of the terminated partnership should continue to be used. See Regulations section 301.6109-1(d)(2)(iii).

<sup>3</sup> Do not use the EIN of the prior business unless you became the "owner" of a corporation by acquiring its stock.

<sup>4</sup> However, grantor trusts that do not file using Optional Method 1 and IRA trusts that are required to file Form 990-T, Exempt Organization Business Income Tax Return, must have an EIN. For more information on grantor trusts, see the Instructions for Form 1041.

<sup>5</sup> A plan administrator is the person or group of persons specified as the administrator by the instrument under which the plan is operated.

<sup>6</sup> Entities applying to be a Qualified Intermediary (QI) need a QI-EIN even if they already have an EIN. See Rev. Proc. 2000-12.

<sup>7</sup> See also *Household employer* on page 4 of the instructions. **Note.** State or local agencies may need an EIN for other reasons, for example, hired employees.

<sup>8</sup> See *Disregarded entities* on page 4 of the instructions for details on completing Form SS-4 for an LLC.

<sup>9</sup> An existing corporation that is electing or revoking S corporation status should use its previously-assigned EIN.

**(UNIT NAME) FRG Informal Fund Budget**

To support FRG operations for Calendar Year \_\_\_\_\_:

Refreshments at monthly FRG meetings	\$30 X 12 = \$360
Participation/Volunteer incentives for monthly FRG meetings	\$20 X 12 = \$240
Command-approved unofficial mail	\$10 X 12 = \$120
Supplies for fundraisers	\$50 X 4 = \$200
Holiday FRG social event	\$500 X 1 = \$500
Summer FRG social event	\$500 X 1 = \$500
Childcare for quarterly FRG town hall meetings (KOS)	<u>\$192 X 4 = \$768</u>
	\$2688
Reserve funds	\$500

Total Annual FRG Budget = \$3,188

This FRG Informal Fund Budget for UNIT NAME was approved:

\_\_\_\_\_  
NAME OF COMMANDER  
RANK, BRANCH  
COMMANDING

\_\_\_\_\_  
Date

**NOTE:** This format can also be used to develop a budget for a fundraiser.



**FRG INFORMAL FUND LEDGER FOR (UNIT NAME)**

MONTH AND YEAR

<b>BALANCE BROUGHT FORWARD FROM PREVIOUS MONTH</b>					<b>\$34.50</b>
<b>DATE</b>	<b>Trans #</b>	<b>Description of Transaction</b>	<b>Beginning Balance</b>	<b>Trans AMT (+/_)</b>	<b>Ending Balance</b>
1/10/2011		Deposit from Motorpool fundraiser (breakfast sandwiches and burritos)	\$34.50	<b>\$75.00</b>	\$109.50
1/10/2011	100	Supplies for Motorpool fundriaser (breakfast sandwiches and burritos)		<b>(\$20.00)</b>	\$89.50
1/14/2011	101	Refreshments for FRG Meeting		<b>(\$15.00)</b>	\$74.50
1/14/2011	102	Dollar Tree volunteer incentives (holiday party volunteers)		<b>(\$10.00)</b>	\$64.50
		<b>BANK ACCOUNT END OF MONTH TOTAL</b>			\$64.50
<b>MATERIAL DONATIONS</b>					
<b>DATE</b>		<b>Description of Transaction/Donation</b>	<b>Number of Items</b>	<b>FMV/Item</b>	<b>Ending Balance</b>
1/7/2011	N/A	Greeting Cards donated by Joan Friendly (mother of SPC Friendly) from her business Snappy Cards	100	\$2.50 (price on back of card)	\$250.00
		<b>MATERIAL DONATION END OF MONTH TOTAL</b>			\$250.00
		<b>END OF MONTH/SHEET TOTAL</b>			\$314.50
		<b>TOTAL INCOME FOR CALENDAR YEAR</b>			\$359.50

#NAME?  
 (Unit) Financial Statement  
 (Unit) Company FRG

Monthly Treasurer's Report

Date: 31 January 20XX

**Monetary Income**

Balance Brought Forward	\$504.32
Donations	
Fundraisers	
Total:	\$504.32
Yearly Income Total:	\$0.00

**Monthly Expenses**

Check #	Description of Monthly Activity	Amount
508	DOLLAR TREE----BABY ORDER SUPPLIES	\$6.42
509	DOLLAR TREE----BABY ORDER SUPPLIES	\$10.70
Total:		\$17.12

Total Monthly Income	\$0.00
Total Monthly Expenses	Minus \$17.12
Ending Balance	Total: \$487.20

*I have reviewed this financial statement and to the best of my knowledge, find it true and accurate I.A.W. AR 608-1.*

Treasurer: Name

Verified by: Name  
 CPT, EN  
 Commanding

INSERT UNIT LETTERHEAD

OFFICE SYMBOL

15 January 20xx

MEMORANDUM FOR COL SMITH

SUBJECT: UNIT NAME FRG Informal Fund Summary for Calendar Year 20XX

1. UNIT NAME Family Readiness Group (FRG), has an Informal Fund bank account at (Bank Name).
2. As of 31 December 20XX, the FRG Informal Fund account balance is \$64.90. \$34.50 was carried over from Calendar Year 20XX.
3. For the Calendar Year 20XX, the FRG generated \$2,000.00 in income, including unsolicited material donations. An itemized list of income is attached.
4. For the Calendar Year 20XX, the FRG spent \$1934.20. An itemized list of expenses is attached.
3. All informal fund expenditures for the year are consistent with the FRG's Informal Fund Standing Operating Procedure (SOP). The SOP reflecting the consistency of the expenditures is attached.

COMMANDER NAME  
RANK, BRANCH  
COMMANDING

**Annual FRG Informal Fund Report  
1 January 20XX - 31 December 20XX**

Unit: \_\_\_\_\_

Does the FRG have an informal fund?       yes    no

If yes, what is the name of the bank where the account is held?      National Bank

Beginning balance on 1 January 2012      \$34.50

**Income (including cash and material item donations, material items at fair market value)**

Activity	Date	Income
Motorpool breakfast sandwich fundraiser	1/7/2012	\$76.00
Valentine's Day bake sale	2/14/2012	\$52.00
Donation from	3/25/2012	\$500.00
Commissary Bagging Fundraiser	5/11/2012	\$541.00
Food Booth Fundraiser	7/4/2012	\$831.00

**Total Income**      \$2,000.00

**Expenses**

Activity	Date	Expense
Jimmy Dean Breakfast Sandwiches	1/6/2012	\$15.00
FRG Meeting Refreshments	1/10/2012	\$15.00
FRG Meeting Refreshments	2/11/2012	\$20.00
FRG Meeting Refreshments	4/10/2012	\$15.00
FRG Meeting Refreshments	5/13/2012	\$15.00
FRG Meeting Refreshments	6/11/2012	\$20.00
FRG Pool Party and Cookout Event (food, drinks, paper goods, decorations, activities)	6/29/2012	\$728.69
Supplies for Freedom Fest Fundraiser (food, drinks, paper goods, serving gloves, and condiments)	7/3/2012	\$78.25
FRG Meeting Refreshments	7/14/2012	\$20.00
FRG Meeting Refreshments	8/10/2012	\$15.00
FRG Meeting Refreshments	9/12/2012	\$15.00
FRG Meeting Refreshments	10/11/2012	\$30.00

FRG Meeting Refreshments	11/14/2012	\$15.00
FRG Meeting Refreshments	12/10/2012	\$30.00
FRG Holiday Breakfast With Santa (food, decorations, paper supplies, giveaways, games, activities, costume rental, place rental)	12/14/2012	\$967.66

**Total Expenses** \$1,999.60

**Ending Balance** (this should match bank statement if no material items obtained as income) \$34.90

**Total Revenue for 2012** \$.40

Fund Custodian's Signature	Date:
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FRG Leader's Signature	Date:
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Company Commander's Signature	Date:
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## UNIT LETTERHEAD

Office Symbol

10 January 20XX

### MEMORANDUM FOR RECORD

SUBJECT: Audit of (UNIT NAME) FRG Informal Fund

1. An audit of the (UNIT NAME) FRG informal fund was conducted on 7 January 20XX.
2. The reason for this audit: UNIT NAME FRG Fund Custodian/Treasurer Daisy Dollar resigned from her position and CPT James Dollar is leaving command of the unit.
3. The last audit was conducted on 19 August 20XX when the new FRG Leader, Lisa Leader took over this FRG Leader position.
4. Findings:
  - Bank statements for January-December 20XX are contained in the notebook.
  - Receipts present in the notebook for all expenditures and amounts are consistent with the ledger entries.
  - Copies of monthly reports submitted to the commander present for January - December 20XX.
  - There is no reference of an Alternate Fund Custodian or Appointment Orders for an Alternate Fund Custodian.
  - FRG Annual Budget line items not consistent with actual FRG expenditures.
5. Discrepancies: FRG Informal Fund Reports missing for the months of March, July, and November. No appointment orders for the Alternate Fund Custodian so it is unclear if they are not present or if there is no Alternate Fund Custodian. The FRG Informal Fund Annual Report for 20XX is not contained in the notebook. Checkbook not present in notebook at the time of audit so entries could not be reviewed.
6. Recommended improvements: If there is not an Alternate Fund Custodian, when recruiting for a new primary Fund Custodian also recruit an Alternate. If there is currently an Alternate, ensure a copy of current Appointment Orders are contained in the notebook. As there is no current Fund Custodian and it is unclear if there is an Alternate, the location of the checkbook is a concern as it was not with the notebook. The list of events and anticipated expenditures contained in the FRG Annual Budget is not consistent with actual expenditures.
7. POC for this memorandum is the undersigned at COM: (XXX) XXX-XXXX or [Stanley.supply8345.mil@mail.mil](mailto:Stanley.supply8345.mil@mail.mil).

STANLEY SUPPLY  
CPT, AR  
S4

**STATEMENT OF FINANCIAL PROGRESS  
UNIT NAME FRG INFORMAL FUND**

FROM \_\_\_\_\_, \_\_\_\_\_ TO \_\_\_\_\_, \_\_\_\_\_  
(Date) (Year) (Date) (Year)

**1. INCOME/EXPENSES:**

a. INCOME

Date/Type:

	Total:
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**TOTAL INCOME FOR THE PERIOD \$ \_\_\_\_\_**

b. EXPENSES

Category:

	Total:
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**TOTAL EXPENDITURES FOR THE PERIOD \$ \_\_\_\_\_**

**2. NET INCOME OR NET LOSS (+, -) \$ \_\_\_\_\_**

**3. RECONCILIATION:**

a. Beginning Balance (Ending balance \$ \_\_\_\_\_  
from previous period)

b. Add Income (or subtract net loss) \$ \_\_\_\_\_

**TOTAL AVAILABLE FUNDS AT END OF THIS PERIOD \$ \_\_\_\_\_**

**4. VERIFICATION STATEMENTS:**

a. The activities and operations of UNIT NAME FRG informal fund have been conducted in compliance with Department of the Army Informal Fund guidance.

Yes \_\_\_\_\_ No \_\_\_\_\_

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b. The funds expended from the UNIT NAME FRG informal fund were used for the purpose in which the unit commander approved in the FRG informal fund SOP.

Yes \_\_\_\_\_ No \_\_\_\_\_

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c. The funds expended from UNIT NAME FRG informal fund were consistent with the FRG informal fund budget for Calendar Year \_\_\_\_\_ approved by the unit commander.

Yes \_\_\_\_\_ No \_\_\_\_\_

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d. Other comments:

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\_\_\_\_\_  
Auditor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name/Title/Rank

\_\_\_\_\_  
Phone/E-mail Address

\_\_\_\_\_  
(Date)



## FRG Informal Fund Audit Auditor Findings Checklist

Unit Information						
Company/Battery/Troop:			Commander:			
Battalion/Squadron:			FRG Leader:			
Brigade/Regiment:			Fund Custodian:			
			Alt. Fund Custodian:			
Date:						
Auditor (Appointed by Commander):						
Reason for Audit (Change of Commander, FRG Leader, Fund Custodian/Alternate, Annual, request of Commander, etc.):						
Auditor Findings/Observations						
	Document	Yes	No	In Progress or Partial	N/A	Other (see notes at end if more space needed)
1	Fund custodian appointment orders current					
2	Alternate fund custodian appointment orders current					
3	Fund custodian certificate of training					
4	Alternate fund custodian certificate of training					
5	FRG informal fund SOP current (signed by commander currently in command or RDC)					
6	Bank memorandum listing current authorized signatories (fund custodian and alternate only) Note: SSNs should be redacted					
7	Previous Audit Reports					
8	FRG informal fund budget for current calendar year					
9	FRG informal fund ledger for the current calendar year (all income and expenditures)					
10	FRG fundraiser requests/approvals from commander/legal for current calendar year fundraisers					
11	FRG fundraiser requests/approvals from FMWR for current calendar year					

<b>Auditor Findings/Observations</b>						
	<b>Document</b>	<b>Yes</b>	<b>No</b>	<b>In Progress or Partial</b>	<b>N/A</b>	<b>Other (see notes at end if more space needed)</b>
12	FRG informal fund report for each month of the current calendar year (must be submitted to the commander every 30 days per AR 608-1, App. J)					
13	Bank statements for each month of the current calendar year					
14	FRG informal fund ledger for the current calendar year					
15	Ledger matches bank statement for all monetary transactions					
16	Receipts maintained for every expenditure recorded on ledger for the current calendar year					
17	Deposit slips maintained for every deposit recorded on ledger for the current calendar year					
18	Withdrawal slips for every withdrawal recorded on ledger for the current calendar year					
19	Expenditures contained on ledger consistent with SOP					
20	Expenditures contained on ledger consistent with FRG Budget for current calendar year					
21	Expenditures contained in budget are appropriate for FRG mission or are FRG related					
22	All expenditures are preapproved by commander (not addressed in SOP/Budget)					
23	Total income less than \$10,000 for the current calendar year (unless cap is reduced by commander)					
24	No outstanding bills					
25	No outstanding IOUs					
26	All checkbooks and extra checks/boxes of checks present					
27	Checks in name of the FRG					
28	Address on checks correct (unit address is required)					

<b>Auditor Findings/Observations</b>						
	<b>Document</b>	<b>Yes</b>	<b>No</b>	<b>In Progress or Partial</b>	<b>N/A</b>	<b>Other (see notes at end if more space needed)</b>
29	Check register updated and consistent with ledger for current calendar year					
30	Memorandum for Record for any missing documentation					
31	Memorandum for Record for any discrepancies					
32	FRG physical property/material item inventory current for calendar year					
33	FRG informal fund documentation organized in a neat or understandable manner in a binder/notebook					
34	FRG informal fund records for the prior three calendar years maintained (with fund custodian, alternate, FRSA/FRL, or at unit)					

**Notes:**

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# FRG PURCHASE & REIMBURSEMENT FORM

Note: This portion should be completed prior to making purchase

Date \_\_\_\_\_

The following items/services are required for the \_\_\_\_\_ (Event Name) \_\_\_\_\_

Date items needed: \_\_\_\_\_ Purchaser Name: \_\_\_\_\_

ITEM	QTY	COST	TOTAL

Reason for Purchase: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Total Amount Approved: \_\_\_\_\_

Approved By \_\_\_\_\_ Signature \_\_\_\_\_

## Reimbursement (Attach Receipts)

Receipt Totals:

\$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_  
 \$ \_\_\_\_\_ (Total Due)

Reimbursement Check # \_\_\_\_\_

AMOUNT: \_\_\_\_\_

Check made out to \_\_\_\_\_

Approved By \_\_\_\_\_ Signature \_\_\_\_\_

Received By \_\_\_\_\_ Signature \_\_\_\_\_

**FRG FUNDRAISER REQUEST FORM**

UNIT NAME \_\_\_\_\_

TODAY'S DATE: \_\_\_\_\_

REQUESTED BY: \_\_\_\_\_  
(NAME OF FAMILY READINESS GROUP)

\*DATE/DATES OF FUNDRAISER: \_\_\_\_\_

\*TYPE OF FUNDRAISER: \_\_\_\_\_  
(EX: BAKE SALE/AUCTION/CAR WASH/RAFFLE, ETC)

\*\*\*FUNDRAISER (F/R) LOCATION : \_\_\_\_\_  
(EXAMPLES: PX/ COMMISSARY, ETC)

PURPOSE OF FUNDRAISER: - \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FUNDRAISER HOURS FROM \_\_\_\_\_ 'TIL \_\_\_\_\_

POINT OF CONTACT NAME FOR FUNDRAISER (PRINTED) \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

I, The Commander or Acting Commander of this FRG, has verified that the FRGs' annual fund raising total is **UNDER** the allowed limit of **\$10,000.00**.  
I have **consulted with an ethics advisor** (e.g. the Brigade Judge Advocate or AdLaw Attorney) for advisement.

\_\_\_\_\_  
COMMANDER AUTHORIZING FUNDRAISER SIGNATURE AND DATE

**\*NOTE:** FUNDRAISER REQUESTS MUST BE SUBMITTED NO LATER THAN 8-10 **WORKING** DAYS PRIOR TO FUNCTION.

**\*NOTE:** COMMANDER MAY APPROVE FUNDRAISERS HELD IN THE CO, BN, BDE, AND/OR MOTOR POOL AREA PROVIDED THE FUNDRAISER HAS BEEN REVIEWED BY THE DA ETHICS ADVISOR. ANY FUNDRAISER OUTSIDE OF THE UNIT FOOTPRINT MUST BE APPROVED THROUGH DFMWR.

# Fundraiser Planning Check List

## Initial Planning

- Decide on a financial goal
- Decide on a product/service
- Obtain Command approval
- Commander consults w/ SJA or Ethics Counselor (if necessary)
- Establish a POC/Committees
- Formulate a plan
  - Identify key tasks
  - Choose a product vendor (if applicable)
  - Recruit volunteers
  - Identify required supplies
  - Determine a budget
  - Obtain Food Handler certificates
- Choose a date
  - Primary date
  - Alternate date
  - Check Unit Training Calendar
  - Check Installation events calendar
  - Check local schools calendars
- Choose a venue
  - Coordinate with facility management for date (consider possible events that conflict/support)
  - Reserve facility
  - Obtain and review facility use policies
- For events held outside of unit footprint, submit Fundraising Request Packet to DFMWR
- Market event
  - Place information in FRG Newsletter month prior and month of
  - Include on monthly FRG Agenda
  - Communicate event at Command & Staff
  - Make Flyers/posters
  - Post early marketing materials in unit area
  - Installation/community media formats (if applicable)

## Pre Event

- Check venue to understand layout and any special considerations
- Gather supplies
- Confirm volunteers attendance
- Review plan

## Event

- Arrive early for set-up
  - Food supplies
  - Service supplies (plates, napkins, trash bag, buckets, hoses, hair nets, hats gloves etc.)
  - Cookware (if applicable)
  - Tables/chairs (if required)
  - Electronics (power strip, extension cords, CD player, etc.)
  - Cash box/change
  - Administrative items (approvals, volunteer schedule, contact numbers)
- Hang marketing tools
- Present a positive attitude
- Communicate goal and milestones to volunteers/customers
- Keep notes of success/challenges for AAR
- Clean up
- Remove marketing materials

## Post Event

- Deposit funds raised
- Communicate event outcome to FRG/Command
- Compile and share AAR
- Recognize volunteers

# FRG FUNDRAISER AFTER ACTION REVIEW

EVENT: \_\_\_\_\_

LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ TIME: \_\_\_\_\_

EVENT POC/CHAIRPERSON: \_\_\_\_\_

APPROXIMATE NUMBER ATTENDING EVENT: \_\_\_\_\_

NAMES OF AFTER ACTION REVIEW ATTENDEES:

**COST OF ITEMS: Estimated Cost/Actual Cost**

Food	_____/____
Beverages	_____/____
Condiments	_____/____
Miscellaneous	
Item _____	_____/____
Item _____	_____/____
Item _____	_____/____

**SUPPLIES: Estimated Cost/Actual Cost**

Cups	_____/____
Napkins	_____/____
Plates	_____/____
Eating Utensils	_____/____
Decorations	_____/____

**RENTAL COSTS: Estimated Cost/Actual Cost**

Location	_____/____
Equipment	_____/____
Transportation	_____/____

**OTHER COSTS: Estimated Cost/Actual Cost**

Item _____	_____/____
Item _____	_____/____
Item _____	_____/____

**ESTIMATED CHARGE PER:** \_\_\_\_\_ (SINGLE)      \_\_\_\_\_ (COUPLE)      \_\_\_\_\_ (GUEST)

ESTIMATED COST OF EVENT: \$ \_\_\_\_\_  
ACTUAL COST OF EVENT: \$ \_\_\_\_\_  
CASH DONATIONS RECEIVED: \$ \_\_\_\_\_  
MATERIAL DONATIONS RECEIVED (FAIR MARKET VALUE): \$ \_\_\_\_\_  
PROFIT/LOSS: \_\_\_\_\_

**NOTES:**

How many volunteers and who (names) participated in executing the event?

What went well?

What challenges did the FRG face with the event?

Recommendations for future events:

- Recommendation #1
- Recommendation #2

Commander Signature: \_\_\_\_\_

Date: \_\_\_\_\_

FRG Leader Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Treasurer Signature: \_\_\_\_\_

Date: \_\_\_\_\_



# Insert Local Donation and Fundraising Policies