

# ***Operating Engineers National Charity Fund Guidelines and Procedures***

(Updated November, 2012)

The purpose of the National Charity Fund is to provide charitable assistance to members and their families who suffer death or serious property damage to their homes in times of national or local disaster. In addition to members, full-time employees of local unions, along with full-time employees of benefit funds and programs affiliated with local unions, shall be entitled to benefits from the National Charity Fund. The Charity Fund may also make contributions to recognized charities as it deems appropriate.

A disaster is defined as an act of God or terrorist event that is generally recognized to be a national or local disaster. Examples include the 9/11 terrorist attacks; hurricanes such as Hurricane Katrina; other natural events like tornados, earthquakes, wildfires, floods, and storms; and a disaster like the Minneapolis bridge collapse. The Fund is not intended to serve as a death benefit fund for loss of life not resulting from a disaster.

Assistance will be provided in the event of a disaster in the following circumstances and within the following guidelines and procedures:

- I. Assistance to members where a disaster causes loss or substantial damage to their home of a type that substantially disrupts their use of their home. For purposes of entitlement to benefits, "home" shall mean the member's principal place of residence, whether it is owned or rented.

Assistance guidelines:

- a. loss or damage: ordinarily, 50% of unreimbursed loss not to exceed \$20,000, funds permitting
- b. immediate emergency payment: upon request and initial review and verification by home Local's Business Manager of membership and loss, ordinarily initial payment of \$3,000 where appropriate, to be deducted from above

Procedure:

- Member fills out a request for assistance and submits to Business Manager of home Local with or without full documentation
- Business Manager verifies membership status, loss, and need and transmits request to the Fund at the International Union's Office of Finance and Administration (OFA)
- OFA logs in request; verifies membership status; reviews and if appropriate issues an emergency check of \$3,000 to member within a target date of 10 working days after the Fund's receipt of request; and transmits request to Calibre
- Calibre reviews request for proper documentation, including insurance information, invoices, estimates, photographs, other proof, plus verification of Business Manager
- Calibre will request additional information if necessary and will re-request

information on a periodic basis; if no response within 8 weeks, will refer back to OFA

- Calibre advises OFA that issuance of a check in a specified amount is appropriate under the Board's Guidelines
- OFA prepares and issues check or otherwise transfers funds to member for the appropriate amount of loss or damage
- Calibre maintains register of requests and actions with dates noted, and all documentation
- Where Local Union or individual contributions are received for assistance in a specific disaster, OFA collects contributions and establishes a separate sub-account so that receipts and disbursements for the specific purpose can be tracked and accounted for, with the amount and terms of assistance subject to adjustment by a committee of the Fund's Board of Directors composed of the President and the Secretary-Treasurer and reviewed by the Board to take into account the contributions received for the specific disaster
- OFA maintains financial records necessary to generate a financial report, for audit by Calibre

## II. Assistance to member's family where member loses life as a result of a disaster

**Guidelines:** an amount to be determined for each disaster by a committee of the Fund's Board of Directors composed of the President and the Secretary-Treasurer and reviewed by the Board, with \$50,000 being considered the base amount, funds permitting

**Procedure:**

- Business Manager of home Local initiates procedure by contacting Fund at International Union's Office of Finance and filling out request verifying membership status, circumstances, and need
- OFA logs in request; verifies membership status
- OFA/CFO advises President and Secretary-Treasurer of request, and President and Secretary-Treasurer determine the amount of the assistance to be provided for the particular disaster
- OFA transmits the request to Calibre
- Calibre reviews request for proper documentation; requests additional documentation if necessary
- Calibre advises OFA that issuance of a check in the amount specified by the President and Secretary-Treasurer for the particular disaster is appropriate under the Board's Guidelines
- OFA prepares and issues check or otherwise transfers funds to member's family for the appropriate amount of assistance
- Calibre maintains register of requests and actions with dates noted, and all documentation
- Where Local Union or individual contributions are received for assistance in a specific disaster, OFA collects contributions and establishes a separate sub-account so that receipts and disbursements for the specific purpose can be tracked and accounted for

- OFA maintains financial records necessary to generate a financial report, for audit by Calibre

If you have any questions please email

[Lewis@Local564.com](mailto:Lewis@Local564.com)

**Attention:**

**Mail the completed form below to the following address:**

**IUOE Local 564  
409 Bryan St.  
Angleton, TX 77515**

**REQUEST FOR ASSISTANCE  
For Loss or Damage to Primary Residence**

**TO BE COMPLETED BY MEMBER:**

Name of Member (print): \_\_\_\_\_

Local Union No.: \_\_\_\_\_ Register No.: \_\_\_\_\_

Telephone: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

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

City: \_\_\_\_\_ State and Zip Code: \_\_\_\_\_ Own   
Rent

Disaster Causing Loss: \_\_\_\_\_

Description of Loss to your primary residence: \_\_\_\_\_  
\_\_\_\_\_

Has your use of your primary residence been disrupted? If so, how? \_\_\_\_\_  
\_\_\_\_\_

Approximate loss (attach invoices/estimates/pictures/other proof): \$ \_\_\_\_\_

Was any portion of loss covered by insurance? ( ) Yes ( ) No

If yes, state covered loss and attach insurance documentation: \_\_\_\_\_  
\_\_\_\_\_

Name of Insurance Company: \_\_\_\_\_

*Under penalty of law, I certify that I have incurred the loss described above and that the information provided herein is true.*

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

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**TO BE COMPLETED BY LOCAL UNION BUSINESS MANAGER:**

I verify that this member is in good standing in this Local Union and has incurred a loss as described above within the Charity Fund's guidelines.

Name (print): \_\_\_\_\_ Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Local Union No.: \_\_\_\_\_

**Please submit Request for Assistance to:** Chief Financial Officer  
International Union of Operating Engineers  
1125 17<sup>th</sup> Street, N.W.  
Washington, DC 20036