



Elks Voluntary Service Guide

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The Elks National Veterans Service Commission’s (ENVSC) mission is one of direct service to our nation’s veterans and military members, with a special focus on service to those in need.

ENVSC-funded projects should focus on one of these five areas of increased need:



Employment



**Homelessness
and housing**



Military families



**Health and
independent living**



**Educational
support**

While admirable, memorials and appreciation ceremonies do not qualify. Lodges are free to use local, state or other funds to hold these events.

Section One:

Welcome

Thank you for joining us as a volunteer!

Voluntary Service Program Overview

The Elks Voluntary Service program stations volunteers in facilities across the country to provide friendship, support, and individual attention to veterans in need. Modeled off the VA Voluntary Service program, the Elks Voluntary Service program also includes support at non-VA facilities.

Volunteers are assigned to a specific facility and must be actively involved in serving veterans there. Each facility has one Representative and 2-3 Deputy Representatives. Volunteers should follow all facility guidelines and respect facility staff as representatives of the Elks organization.



Representatives take the lead in planning activities and organizing events. Representatives also:

- Visit at least once a month
- Represent the Elks at the facility
- Recruit volunteers to help
- Share regular updates with State Veterans Chair
- File monthly reports online
- Handle the monthly allocation and the corresponding bank account
- Save all program receipts for 3 full years
- Host events at least four times per year

Deputy Representatives are assigned to facilities to assist the Representative. Deputy Representatives:

- Visit at least every other month, or 6 times a year
- Represent the Elks at the facility
- Help with activities and programs
- Recruit volunteers to help

How it works

ENVSC sends funds to each state
(direct deposit available)



State divides funds into individual allocations



Representative receives monthly allocation in account

An Elks **Representative** is a certified Voluntary Service Representative at a VA Medical Center, State Veterans Home or private non-profit location. Though Representative is a VA term, we use the same terminology for volunteers stationed at non-VA facilities.

An **Associate Representative** is the same as a Representative, but they are certified at a location that is across state lines.

Lead Deputy Representative – a certified Voluntary Service Deputy Representative at a VA outpatient clinic or health center (e.g. CBOC, OPC). This person will be listed in VA records as a Deputy Representative. However, they will fulfill the duties of an Elks Representative in that they will be the lead volunteer at a clinic location, submit monthly reports, and follow all banking and reporting procedures that Representatives do. They are encouraged to coordinate with the CDCE office and Elks Representative at the main VA Medical Center.

A **Deputy Representative** is a certified volunteer at a VA Medical Center, VA Clinic, State Veterans Home or private non-profit location. Deputies are expected to work with the Representative to provide services to veterans. They should support the Representative at events, host

activities and act as a back-up for the Representative. Deputy Representatives may submit reports in place of the Representative if needed.

An **Online Assistant** is a Lodge or family member who has been given access to the online reports for a specific facility, for the sole purpose of assisting a Representative with online reporting. They do not handle funds or have an Elks or facility role beyond helping with online record-keeping. If you need an Online Assistant, please contact our office and we will work with them to set up access.

What's the difference between an Elks Voluntary Service Representative and a Lodge Veterans Chair?

- Lodge Veterans Chairs handle funding from the Lodge and report to their Lodge leadership. Representatives are accountable to their State Veterans Chairs and to the ENVSC. Some people hold both positions at the same time.
- When you contact us with questions about your activities as a Voluntary Service Representative, we may not be familiar with the work you do on the District or Lodge level, so be sure to let us know which facility you visit as a volunteer.

Section Two:

Getting Started

I. Set Up a Bank Account

- A** Obtain records from the previous Representative, including all remaining funds in the facility account, details of ongoing programs, and names and contact information for people to work with at the facility.
- B** You must have a bank account for the facility that you represent. If you are a Representative at more than 1 facility, you will have multiple bank accounts.
- C** We recommend linking your bank account to the Lodge ID, with your Lodge's permission. However, keep in mind that ENVSC funds can never be mixed with other Lodge funds. Your ENVSC allocation is meant to specifically serve veterans at your designated facility. It must be kept separate and in its own account.

- D** You may open an account under your own name. This is a good option if you spend the majority of your allocation each month. You must designate at least one other person to have access to this bank account. We recommend that this is a Deputy Representative.
- E** Bank fees may be paid with ENVSC allocations. When you establish your account, be sure to ask about fees and try to select a bank with minimal ones. Please note that the ENVSC cannot provide its tax ID to use for this account.
- F** If you do not receive your monthly allocation, it is most likely because you did not file your required monthly report on time. Please contact your State Veterans Chair with questions.



II. Local Volunteer Orientation

- A** Contact the CDCE office or Voluntary Service department at your facility and introduce yourself as the Elks volunteer. Ask about the steps needed to complete your certification as a Representative or Deputy. Staff members will take you through orientation. This process will vary depending on facility policies and your volunteer duties and may include health screenings or a background check.
- B** Talk with the staff to determine the greatest needs at the facility and what type of supplies or activities would be most appreciated by the veterans there.
- C** Especially at VA facilities, ensure you are listed as a BPOE Representative, record attendance at volunteer meetings, and track all volunteer hours.

Section Three:

Jumping In

I. Your Monthly Allocation

- A** You will receive your monthly allocation from your State Veterans Chair or other State Association Official every month. Your Lodge or state may contribute additional funds to your account.
- B** Use your allocation to fund activities, buy supplies, and plan outings at your assigned facility. Use this monthly allocation only to serve veterans at your assigned facility.
- C** ENVSC funds may not be distributed as cash and all expenses must have corresponding receipts. Instead of giving cash prizes for bingo, try gift cards or canteen books.
- D** While memorials are a worthy cause, ENVSC allocations are intended to be used only for increasing the health and well-being of living veterans at your assigned facility.

II. Planning Your Visits

A Visit your facility at least once a month to see veterans or host activities. Enlist your Deputy Representatives or Lodge members to participate.

B Get creative! Meals and bingo are popular, but you can also host:

- A monthly birthday party
- Regular ice cream socials
- Movie nights with popcorn
- Themed parties with costumes and decorations

C Off-site trips are a great way to add excitement for veterans who are living in hospitals or nursing homes. Places to visit include:

- Sports events
- Museums
- A zoo or botanical garden
- Fishing trips

D Bring people together to alleviate isolation:

- Ask local students or scouting groups to create cards for veterans

- Hire musicians, singers, or magicians to perform at the facility
- Invite community groups to visit, like a craft or book club

E Consider games and entertainment supplies that support developing skills like memory or dexterity. The facility staff may have tips for what would be most helpful.

- Provide stress balls, fidget blankets or toys
- Organize chair games with pool noodles or balloons
- Start a music and memory program with karaoke, playlists, or instruments
- Plant a container garden indoors or outdoors
- Host a dance, yoga classes, or other types of accessible movement classes

F The holidays can be a busy time, but there are often fewer events between occasions. Add visits during slower times of the year so that veterans will always have something to look forward to.

- Superbowl or Olympics watch parties
- Summer activities that include families/ grandchildren

- Celebrate something unique, like National Pen Pal Day (June 1) or National Pie Day (January 23)

G

Read the booklet “Elks in Action: Ideas for Serving Veterans” for more ways to serve veterans at your facility.



Attention volunteers at VA facilities!

Stay in touch with your Center for Development and Civic Engagement (CDCE) office. This is the new name for the VA Voluntary Service (VAVS) office. In some locations, VAVS and CDCE are used interchangeably.

- Make sure the staff know you are an Elks Representative or Deputy Representative, and that you are listed as such in the VA system.
- Record your volunteer hours and donations in the VA system.
- For Elks Representatives, attendance at quarterly VA Voluntary Service Committee meetings is required. If you miss three consecutive meetings, the VA will revoke your official status as a Representative. If you can't attend in person, there is often a way to call or video conference into these meetings.

- Deputy Representatives should also attend meetings when possible and fill in when the Representative isn't able to attend.

Attendance at these meetings keeps you informed about the needs of veterans at the facility. It also ensures that the Elks are invited to be on the VA Voluntary Service National Advisory Committee. If Representatives don't complete local volunteer training and attend quarterly meetings, the Elks will not get credit for your time as a volunteer and will not be invited to be on this Committee.

Don't forget to contact the CDCE office to complete your Annual Joint Review. This is a time to check in with your facility and talk about accomplishments and goals for next year.



Section Four:

Keeping a Record

Voluntary Service Reports

- A** Each report should be submitted by the 15th of the following calendar month. After one full month, they are considered late. For example, a January report should be complete by February 15th and is late on March 1.
- B** If you are more than 1 month delinquent in submitting your report, you will not receive any future allocations until all reports are complete.
- C** If you are sick or planning to be out of town when a report is due, ask a Deputy Representative to step in for that month. Deputies have access to the online system and can easily assist.
- D** If you need to correct a submitted report before it has been approved, please let the ENVSC office know. Once a report is approved, the correction can usually be added to the following month's report. Call our office to resolve any report issues you have.

- E** Please notify the ENVSC office if you or your Deputy Representative have a change of address or other contact information, or if you can no longer serve.
- F** Don't hesitate to contact us if you have questions about your reports. We're here to help and will be happy to walk you through the reporting process or answer any questions.
- G** Representatives are required to save all Voluntary Service program receipts for 3 full years in the blue folder that you received in your welcome packet. Continue to send any receipt copies your state asks of you, and simply keep an extra copy in the blue folder.

It's important to maintain a good working relationship with facility staff at all times, since they control access to the veterans that we are seeking to serve. Be aware of and follow local guidelines. Keep in mind that you are representing the Elks organization.

Planning for the Future

Though your certification does not expire, we don't expect you to stay in this position forever. Volunteers often step down if they move, need to care for family members, their work circumstances change, or simply want more time to themselves.

Here are a few things we ask each volunteer to keep in mind.

- Two names are required on the facility bank account, to ensure that funds will remain dedicated to serving veterans at your assigned facility and not be used for other purposes.
- Keep your State Veterans Chair and the ENVSC office in the loop. If you're recovering from an injury and taking a month or two off, let us know.
- When you step down, please work with your replacement or your State Veterans Chair to keep close track of the funds remaining in your account.

If you do not work directly with your replacement volunteer, please contact your State Veterans Chair to close the account and coordinate return of the funds.

- Be realistic. Don't burn yourself out. It's better to be a consistent, dependable volunteer for a few years than a rockstar for a few months.
- Have a succession plan. Consider other people at your Lodge or in your district who'd be a good fit. Invite them to activities and involve them in planning.
- Don't underestimate the role of Deputy Representatives. This can often be the person to take over when a Representative steps down. It can also be a good role for a former Representative who still wants to be involved but needs to take a step back.

Remember, it's not about the title.

It's about the veterans.

Section Six:

Step-by-Step Instructions for Submitting a Monthly Report

1 Go to www.elks.org/vets/vavs/report.cfm.

2 Log in with your elks.org username and password.

A If you do not have an elks.org username and password go to elks.org and click on “Register” in the top right corner of the page, right above the stripes on the American flag. Be sure to enter your name, Lodge number, and member number.

B If you are currently registered as a Representative or Deputy Representative, you will be able to submit a report for your assigned facility.

3 At the top of the report, there will be a yellow box with basic instructions. Beneath that, you have the option to choose your facility. You can only submit reports for facilities at which you are the designated Representative or Deputy Representative.

4 Choose the correct month and year from the drop-down fields. The system will not let you skip reports. If you did not visit your facility or spend any funds during a certain month, you will be required to submit a form for that month before the system will allow you to move forward. For example, you cannot submit a report for August 2021 until a report for July 2021 is submitted. You are also unable to combine months or facilities.

5 Click “Create Report.” (At any point during this report, you can scroll down to the bottom to click “save report”. This is especially useful if you would like to complete the report at another time.) If you are returning to complete a report, all reports in progress will be available on the dashboard.

6 Verify that the facility address and name are correct, along with the bank information we have on file. If this is incorrect, email Vets@elks.org with changes.

7 Enter the income you received. After your first report, your existing balance will automatically load the ending balance from your last report. This information cannot be edited, so please double check all math before submitting a report.

8 Complete the “Description of Programs” section of the report. Required fields are marked with a red asterisk, and cannot be skipped. For example, if no Deputy Representatives assisted that month, you must type No in the answer field.

9 Estimate any information you are unsure of. Please note that number fields will not accept ranges. For example, you will not be able to type “25-35 veterans attended.” You must estimate that 30 veterans attended.

10 Enter each expense for the month. Be clear. Do not use generic terms like “supplies” or “miscellaneous,” and do not enter check numbers with no description. For each expense, estimate how many veterans were served. Make sure the ending balance matches your records.

11 If everything is correct, click “submit report to ENVSC.”

12 You will receive an email confirming that we received your report.

13 Once our office has reviewed your report and found it acceptable, you will receive a second email verifying that the report was approved.

14 If our staff has questions about the report, you will receive an email asking you to edit or clarify the report. This will make your report available for you to edit on the dashboard. When you are finished, click “submit report to ENVSC.”

Please contact your State Veterans Chair
with questions. You can also contact the
ENVSC office anytime with questions!

You can reach us at

773.755.4736

or at

Vets@elks.org



Elks National Veterans Service Commission



@ElksVetsService



@ElksVets

elks.org/vets