

Oil Heat Cares Policy

Program:

The Oil Heat Cares Project is supported by the Oil Heating Industry with NAOHSM spearheading the project. The purpose of the program is to receive and administer equipment, materials and funds to assist needy persons and organizations with replacement, refurbishment and/or repair of heating equipment. Fund raising is an important element of the project. All funds are used to purchase equipment needed for identified projects. NAOHSM chapter members will work together to install the equipment at no cost to the recipient. It is understood that a local contractor will act as a lead contractor and have all necessary insurance coverages.

Management of Funds:

A separate bank account has been set-up for Oil Heat Cares. Separate books have been set-up for the accounting of all activities related to Oil Heat Cares. To represent the industry, directors have been appointed. There will be a minimum of seven (7) representatives to manage the funds and activities of the project. There will be one representative of the Oil Heat Manufacturers Association, two representing Trade Associations and four representing NAOHSM. Additionally, other volunteers will be solicited to assist the directors.

Each appointment is to be for 2 years. Any re-appointments, replacements, etc. shall be by the NAOHSM Board of Directors. Refer to the by-laws

Types of Candidates:

As outlined above, this project is designed to help those in need that basically fall through the cracks. Due to a temporary situation in their lives, they make too little income to have necessary repairs made to existing oil heat systems but too much for government assistance. The ideal candidates are:

- Those recommended by local churches in your community
- Identified by members or employees of oil companies
- Military Families with one spouse in active duty

Basic Requirements to be met by the Recipient:

- Own their own home
- Give permission to use their name and picture for any resulting publicity
- Understand that this is a one-time act of kindness

Requirements for Requesting Funds by Chapters

- Must complete the Request for Funds Form (available online www.oilheatcares.com)
- Designate a lead contractor that is willing to acquire any necessary permits to do the work.
- Provide brief description of the project
- Recognize that the funds are available for **equipment and major supplies only** and that the Oil Heat Cares Committee would help secure the best price of the equipment preferred by the installers
- Be willing to take photos and submit to the committee after or during the job.
- Sign a waiver acknowledging the labor is voluntary, they are not acting as an employee of any organization and that the laborers are over the age of 18. (note copy of waiver online – www.oilheatcares.com)

Approval Process

- The Chairman of the Board will notify the committee about a new project.
- Any completed paperwork pertaining to the job will be forwarded to the committee
- The committee will either approve or disapprove the project promptly after receipt of completed paperwork.
- Upon completion of the job, invoices for equipment shall be submitted to the committee for payment.

Amendment to Policy – October 2009

In order to assure available funds, the Board of Oil Heat Cares has taken a proactive approach to the management of funds. It has been agreed that a cap of \$2500.00 will be placed on qualifying projects. This figure represents an average cost per job over a period of 4 years.

It is agreed the Board will consider exceptions to this amendment and the lead contractor requesting additional aid is responsible for stating their case.

Payment Procedures

Payment for any invoices shall be handled promptly. The bill will be submitted to NAOHSM's office. The check will be prepared and sent out with two signatures. Any officer of Oil Heat Cares Foundation is authorized to sign checks.

Reports

The Treasurer of Oil Heat Cares will be responsible for providing the Board with a financial report so that he or she can report receipts and disbursements and balances at each Board Meeting. An independent accountant will be used for

purposes of filing reports. The renewal of the accountant will be voted upon at the board's annual meeting.

Updated 10/09