



DEPARTMENT OF THE ARMY
U. S. ARMY GARRISON, FORT BELVOIR
DIRECTORATE OF MORALE, WELFARE AND RECREATION
5820 21ST STREET, SUITE 109
FORT BELVOIR, VIRGINIA 22060-5937

REPLY TO
ATTENTION OF

IMNE-BEL-PE

1 Mar 09

MEMORANDUM FOR Units Assigned to Fort Belvoir

SUBJECT: Standing Operating Procedure for Unit Funds

1. Reference:

Army Regulation 215-1, Morale, Welfare and Recreation Activities and Nonappropriated Fund Instrumentalities, 31 Jul 07.

2. Purpose: To establish policies and procedures to be used in the administration and operation of unit funds within the Installation Morale and Welfare Recreation Fund at Fort Belvoir. Unit fund support is intended to provide off-duty recreational purposes for the collective benefit of all eligible organization or unit members. Nonappropriated fund support is not a requirement. Support may only be provided if requested by eligible organizations or units. Fort Belvoir MWR provides \$0.50 per Soldier per month. **Unit funds expire at the end of each fiscal year and do not carry over.**

3. Eligibility:

a. Eligible Army units must be assigned to Fort Belvoir, and unit members must be physically present for duty at the location of the eligible unit.

b. Eligible units will not request or accept NAF monetary support from more than one MWR agency for the same eligible personnel during the same period of time.

4. Establishing a Unit Fund:

a. The MWR NAF Financial Management Office will establish a unit fund account for the unit upon receipt of activation orders, a DA Form 1687, Delegation of Authority, and an Assumption of Command memo.

(1) The DA Form 1687 expires on 30 September of the current fiscal year, thus must be updated annually.

(2) Unit Fund Representatives who are delegated authority on the DA Form 1687 must attend a unit fund training brief before handling the unit fund account and sign for the Unit Fund SOP and checklist. These briefings are conducted on a one-on-one basis with the Financial Management Office.

b. The Unit Fund Representative is responsible for:

(1) Submitting monthly strength reports to the NAF MWR Financial Management Office.

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(2) Maintaining a file, to include copies of all receipts for expenditures. The original receipts for expenditures will be submitted to the MWR NAF Financial Management Office within 5 working days following the event. If receipts are not turned in, additional funds will not be signed out to a unit until this is accomplished.

5. Expenditures of Unit Funds:

a. The Commander will exercise control over the unit funds and should be guided by the principle that such funds are held in trust to be used for unit morale, welfare, and recreation activities to benefit all members of the unit, this includes ensuring any assigned agencies receive their fair share of funds based on unit strength. Questions concerning the appropriateness of an intended purchase should be directed to the Financial Management Office.

b. Unit funds may be expended for the collective benefit of all unit members for off-duty recreational purposes as prescribed by AR 215-1. All unit members must have the opportunity to participate in the activity supported with unit funds.

c. Unit funds may not be used for:

(1) Purchase of alcoholic beverages.

(2) Non-recreational items, to include maintenance or service of non-recreational items.

(3) For any expense involved in a change of command/retirement ceremony or for professional development.

(4) Purchase of any type of equipment.

(5) For any purpose that cannot withstand the test of public scrutiny or which could be deemed a misuse or waste of Soldier dollars.

d. As instrumentalities of the United States Government, unit funds do not pay state and local taxes. When funds are picked up to be spent off-post, please request a tax exemption certificate.

6. Purchase Procedures:

a. Commanders, or their designated representatives, are required to submit a memorandum to the Financial Management Office at least 2 weeks in **advance** of the scheduled event in order to request unit funds.

b. The memo must contain the date of the event, name of the event, completed unit fund request form (provided at bottom of this SOP), the amount of money requested, and the person designated to receive funds. The designee must be listed on the DA Form 1687 authorizing them to receive unit funds.

c. Purchases not exceeding \$500.00 can be made with petty cash, if available.

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7. The POC for Unit Fund Procedures is the Financial Management Office at 805-4102/4151.

A handwritten signature in dark ink, appearing to read "Patty DeDecker". The signature is fluid and cursive, with the first letter of each word being capitalized and prominent.

PATTY DEDECKER

Financial Management Officer

MWR Unit Funds Request Checklist

Unit Name: _____

Requestor: _____

Amt being requested: _____

Prior to approval of unit funds request the following questions must be answered in order to ensure funds are used IAW AR 215-1 and to determine if a contract needs to be initiated for any services requested:

YES NO

		Will unit fund activity be open to all military members of the unit ?
		Is it for off-duty, recreational purposes?
		Does event include catering services or any other type of "service"? Please explain details below.
		Is the unit coordinating with any MWR activity (renting a dunk tank, park etc)?

Details of catering/services required:

Requestor's signature & date:

Financial Management Use: Was request received 2 weeks in advance of event? YES NO