



# OPERATION FINALLY HOME

PROJECT OVERVIEW HANDBOOK

With faith in God and determined action,  
Operation FINALLY HOME brings people together to

**BUILD HOMES AND HOPE FOR AMERICA'S  
MILITARY HEROES AND THEIR FAMILIES.**



OPERATION  
**FINALLY HOME**

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## About Operation FINALLY HOME

### HONORING HEROES WITH HOMES

Operation FINALLY HOME is a national nonprofit organization that addresses one of the most pressing needs of our returning troops—a home to call their own. Our mission is to provide homes and home modifications to America’s military heroes and the widows of the fallen who have sacrificed so much to defend our freedoms and values. To accomplish this important mission, Operation FINALLY HOME partners with national and local corporate sponsors, builder associations, builders, developers, individual contributors, and volunteers in local communities across the United States. Our troops have demonstrated courage, acted with bravery, and defended our cherished freedoms. They’ve given us the ability to chase our dreams, laugh with our friends, and have dinner with our families. They have given us—proud Americans—a higher quality of life. It’s our turn to give that quality of life back to them. We call them heroes because they have worn the uniform and have made this country a better place for us. Let’s make it a better place for them, too.



### ABOUT THE FOUNDER

Dan Wallrath was a custom home builder in Texas for 30 years. In that time, he served on numerous boards within the building industry, including the Board of Directors of the National Association of Home Builders, Texas Association of Builders and the Greater Houston Builders Association, and he was president of the Bay Area Builders Association. Dan was also recognized as the “Custom Builder of the Year” by the Greater Houston Builders Association and the Bay Area Builders Association. Following a request to remodel the home of a wounded Marine in 2005, Dan was able to work with his community and provide the home to the family at no cost. Dan then founded Operation FINALLY HOME, a nonprofit organization providing custom-built, mortgage-free homes to military heroes and the widows of the fallen who have sacrificed much to defend our country’s freedoms and way of life. Dan was named a CNN Hero in 2010 and was







## WHAT MAKES US UNIQUE

Operation FINALLY HOME develops partnerships with developers, builders, suppliers, and tradesmen to do what they do best: build homes. Once a builder is committed, the Operation FINALLY HOME Family Selection Team searches for the best candidates for that area.

The Operation FINALLY HOME Family Selection Team primarily works with military caseworkers assigned to severely injured service members and other military and veteran administration sources. Most of our referred cases involve service members with the most severe injuries who are unable to continue to serve in the military. Once the team has identified candidates, our Executive Management Team, Board of Directors, and builder(s) review and approve the best recipient in the area. Our homes are provided 100% mortgage-free. Once these veterans and their families cross the thresholds of the front doors to these homes, they own them with a requirement to live in the homes for seven years.

- Foundation of faith and determined action
- We are “of the home building industry”.
- We bring the community together to honor America’s wounded, ill, and injured military heroes, the widows of the fallen, and their families.
- We don’t build the homes—through partnerships, we bring people together that do.
- Mission of support is broad
- Focus on most deserving and most in need with filters being equal parts of validation of service and sacrifice along with character

the guest of honor of Marine Corps Commandant General James F. Amos at the Marine Corps Sunset Parade hosted at the War Memorial in Washington, D.C. in 2013. He was also featured in a CNN documentary about Operation FINALLY HOME in December 2013.

In 2016, Dan published *Building Hope: What Happens When God Changes Our Plans to Accomplish His*, which is the story of Dan’s journey as he followed his call to serve America’s military heroes, starting with a team of one and growing to lead one of the nation’s most respected non-profit organizations serving U.S. veterans. This inspirational memoir reveals how stepping out in faith turned into a lifetime commitment to build homes for those who have sacrificed while wearing America’s uniform in defense of our freedoms and our way of life. *Building Hope* is available on Amazon.



# What to Expect

**T**hank you for taking on one of the most challenging, yet gratifying, experiences of your life! Every home build is unique and presents its own set of challenges, opportunities, and amazing rewards.

Operation FINALLY HOME's program does not work without the passion and commitment from builders and sponsors who are dedicated to changing the life of one of America's wounded, ill, or injured heroes. The builder is the driving force in completing a project, responsible for all facets of building the home. The sponsors help alleviate some of the financial burdens and often assist with key pillar events. This is a challenge and a serious commitment.

The builder(s) in partnership with Operation FINALLY HOME will undertake all that is necessary to complete a build. The goal is to finish the project at no cost (including money raised or contributed for a special project). Each build is unique and every builder may work differently with the homeowner, subs, suppliers, and other partners and with preferred processes necessary in successfully building a custom home.

Operation FINALLY HOME expects the builder to donate their time and profit to the project. In addition, the builder will facilitate the project with their trades, suppliers, and subs as well as the community.

Operation FINALLY HOME will work with each builder and their accounting team to determine their preferred means of paying bills.

# *Journey*

## TO HOME



### STEP 1

#### ENLIST BUILDER

1. Gain commitment from builder to lead project
2. Gain general understanding of plan and/or location builder has in mind
3. Estimate cost per square foot



### STEP 2

#### SELECT FAMILY

1. Identification and vetting
2. Family Needs Assessment provided to team



### STEP 3

#### SELECT LOCATION

1. Refer to Family Needs Assessment
2. Determined by builder with Operation FINALLY HOME



### STEP 4

#### FINALIZE PLAN

1. Incorporate Family Needs Assessment
2. If VA/SAH Grant eligible:
  - a. Must follow VA/SAH guidelines
  - b. Determine Minimum Property Requirements (MPRs) that can be waived by veteran



### STEP 5

#### FINALIZE BUDGET

1. Conduct Town Hall Meeting
2. Determine how donation shortfalls will be funded
3. Operation FINALLY HOME approval for any funding needs



### STEP 6

#### ESTABLISH & EXECUTE PILLAR EVENTS

1. Surprise
2. Groundbreaking
3. Notes of Love
4. Dedication Ceremony



# Responsibilities of Operation FINALLY HOME

**Operation FINALLY HOME assumes the following responsibilities with each build:**

1. Partners with builders willing to take responsibility for constructing a new home and guides them through the project process from planning, design (usually stock plans), budget approval, and groundbreaking to completion.
2. Assists the developer/builder in locating and securing real estate for home site.
3. Selects home recipient who has need for housing and a desire to move forward with their lives. The builder has an opportunity to review the recipient's key information to fully understand their needs.
4. Acts as administrator of all funds, gifts, and contributions through our 501(c)(3) status, allowing for tax-deductible contributions for the project. This includes the payment of project expenses as per the approved budget.
5. Provides sponsors, whenever possible, who will raise funds through donations or fundraising activities to pay for property, labor, and materials that cannot otherwise be provided through gift-in-kind donations.
6. Provides fundraising and gift-in-kind donation assistance for product and service donations, including national, regional, and local product manufacturers and service providers.
7. Provides marketing and media support for project pillar events, including town hall meeting, surprise announcement, groundbreaking, notes of love, and dedication as well as fundraising events.
8. Provides builder with following documents:
  - Accounting procedures including IRS Form 990, Gift-In-Kind form and appropriate Operation FINALLY HOME contact information.
  - Event invitations and Media Advisories to all Pillar Events.





# Veteran Selection

The most important part of any project that we undertake is the people we help. This is especially true when these people have risked their lives, and in many cases had their lives forever changed, in the defense of our country. When a veteran and their family receives a home from Operation FINALLY HOME, they forever become a part of our family. We keep in contact with all of these families and continue to look out for them whenever possible.

The veteran selection process begins when a builder is found that is willing to build a home in a particular region. Initially, we try to find veterans in the region in which the home will be built, but we also consider other veterans if they are willing and able to move to the region in which the home will be built. Once the builder has been identified, Operation FINALLY HOME works with medical case managers, recovery care coordinators, federal recovery care coordinators, and Army, Navy, Air Force, Marine and Coast Guard Advocates as well as the Veterans Administration to identify and recommend suitable veterans. It is only after a veteran is recommended that they will be considered for a home. With several potential veterans identified, each veteran fills out an information package, which includes information about their military service, their injury or illness, and



**CPL. JONATHAN DOWDELL & WIFE, REBECCA**

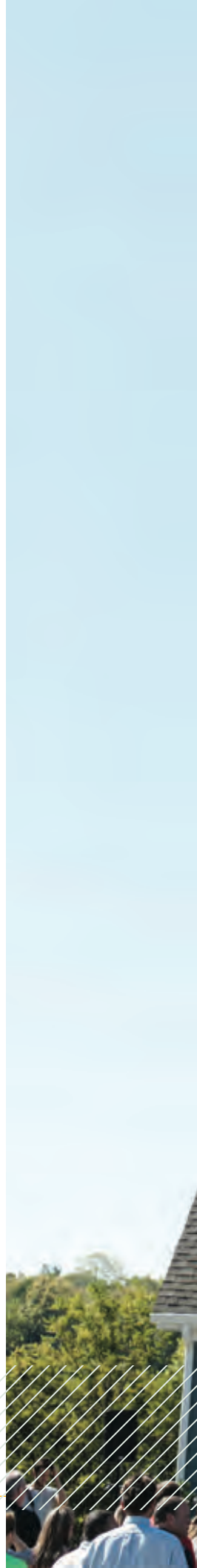
other personal challenges that they and their family are facing as a result of their injury or illness. Operation FINALLY HOME then reviews these applications and, with some input from the builder, makes a selection of the veteran and family that will receive the home.

A key factor considered when selecting a veteran and their family is their ability to accept the responsibilities of homeownership. The gift of a home is intended to be a blessing to the veteran, not a burden. The veterans that receive homes do so with a commitment to live there for a minimum of seven years. Owning a home comes with responsibilities such as maintenance, property taxes, and other financial commitments. We want to make sure the veterans and their families are prepared to accept these responsibilities. Other factors considered include accessible medical care, schools, and whether or not the family has a support system of family and friends in the area.

# Responsibilities of the Builder

**Operation FINALLY HOME expects the following from their builder partners:**

1. Provide your services at no cost, which may involve you, your office staff, your project manager, and your superintendent.
2. With assistance from Operation FINALLY HOME, solicit donations for products and services through established vendors. This is best done by hosting a Town Hall meeting to solicit project support.
3. Develop line item budget to present to Operation FINALLY HOME for approval.
4. Responsible for construction plans, specifications, design, engineering, estimating, permitting, inspections, cost control, and construction of the home through completion.
5. Provide a construction schedule consisting of start date, dry-in, and completion date.
6. It is our intention that an Operation FINALLY HOME project be managed and run in a manner consistent with your normal operations.
7. Involve your suppliers and subcontractors. Contact the people with whom you commonly do business and urge them to participate in the project by donating their materials and labor. Ask them to also contact their suppliers for help.
8. Meet with city officials to obtain their support by waiving all city fees and services.
9. Attend your local Home Builders Association meeting to share what you're doing for the community by providing a mortgage-free home to a deserving veteran.
10. Meet with civic organizations to obtain their support. Many of these organizations become involved by holding fundraisers in support of the project.
11. Meet with local companies to garner support. Local grocery stores have stocked the pantry and refrigerator.
12. Meet with community organizations and groups to request support. Local organizations such as churches, veterans groups, running clubs, bicycling clubs, and other similar organizations may be interested in organizing or participating in fundraising activities, landscaping, providing children's play areas, painting murals, accent painting, and other activities.
13. Have fun building the home!



MAY THIS  
HOME SERVE  
AND PROTECT  
YOU AND YOUR  
FAMILY AS YOU  
HAVE SERVED  
OUR COUNTRY  
THANK YOU





# Pillar Events

*Operation FINALLY HOME has been successful in coordinating key events around a home build. The following marketing events typically happen around Operation FINALLY HOME projects: Town Hall Meeting, Surprise, Groundbreaking, Notes of Love, and Dedication.*

## 1 TOWN HALL MEETING

Typically, this is the first meeting that the builder conducts to solicit community involvement along with product and service donations. During this event, the builder and Operation FINALLY HOME provide an overview of the mission, the build, and what's needed from the trades and subcontractors—from products and services to monetary contributions.

## 2 SURPRISE

When a home recipient is officially named, a surprise event helps announce the details to the community and media. Successful announcement events range from high-traffic public events with media already on-site, such as a concert or professional sports game, to surprise groundbreakings at the home site or a reveal held in conjunction with an established community event.



The event typically involves calling the veteran recipient on stage with a spouse, family member or friend, where the announcement is made that they are receiving a home. Distributing a media advisory to local media prior to the event preps media and a post-event press release disseminated to local media after the announcement event helps gain additional coverage. Operation FINALLY HOME provides media relations and event planning support for the home recipient surprise event.



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## GROUNDBREAKING

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# 3

Following the selection of the family and the official build announcement, Operation FINALLY HOME works with the builder and build sponsors to kick off construction with a groundbreaking event at the future site of the veteran's new home. This event helps foster support of the build and family within the local community and raises awareness of the project.

The event begins with the National Anthem and includes a few words from the builder, the primary build sponsor (if applicable), and Operation FINALLY HOME. Prominent members of the community speak, as appropriate. The family then joins all participating organizations in a ceremonial groundbreaking. Operation FINALLY HOME provides media relations and event planning support for the groundbreaking celebration.



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## NOTES OF LOVE

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# 4

Family, friends, and members of the community gather at the build site to surround the family with “Notes of Love” by signing inspirational phrases, scripture, and notes of appreciation on bare studs and headers. Based on response from our families, this event carries some of the deepest warmth and love of the entire process due to the support shown.



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## DEDICATION

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# 5

As the capstone for each Operation FINALLY HOME build, the home dedication brings together the local community, the builder, and all other

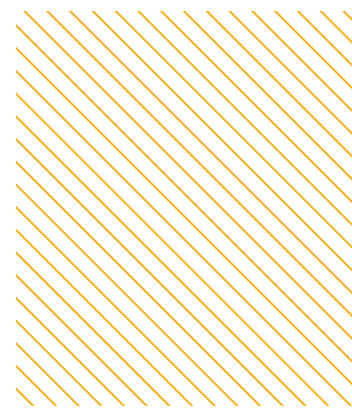
build participants to commemorate the delivery of the keys to the veteran's family. Operation FINALLY HOME reaches out to local media to publicize the event. The organization invites members of the local community and local media to celebrate completion of the home. The event begins with the National Anthem and includes a few words from the builder, the primary build sponsor (if applicable) and Operation FINALLY HOME. Prominent members of the community are invited to speak, as appropriate. The family then receives the keys to their new home.



# Marketing & Publicity

**G**enerating awareness of an Operation FINALLY HOME project helps garner community support and sponsorships while offering recognition to the builder, sponsors, and service partners. Marketing and publicity support for Operation FINALLY HOME projects typically falls within three categories: events, media relations/publicity, and social media.

Operation FINALLY HOME will promote projects via our organization’s website and social media channels and/or via partner/sponsor-owned media assets. Press releases and media advisories may be distributed to relevant media lists. Operation FINALLY HOME is available to provide quotes or to speak directly to media about projects. When available and appropriate, our team will align with marketing/communications partners to assist in the dissemination of information.



## **PUBLICITY**

Throughout the course of the build, Operation FINALLY HOME will provide publicity and marketing support to the builder and primary build sponsor. These efforts may include:

- Build update press releases sent to local media
- Ongoing build updates and photos posted online
- Build photos and updates shared via Operation FINALLY HOME’s social media channels
- Project media coverage shared via Operation FINALLY HOME’s social media channels
- Build videos created and shared as appropriate

In some build situations, Operation FINALLY HOME may negotiate or assist in negotiating local media partnerships.

## **SAFETY NOTE**

It is imperative that safety be top-of-mind when bringing media or community guests on the build site. Guests should be instructed to wear appropriate attire (closed-toe shoes) and should be offered hard hats when touring, if needed. A safety review is recommended prior to any on-site tour, and it is also recommended to have guests sign a safety release form prior to touring the build site.



## MEDIA INQUIRIES

### MOLLY HALLIDAY

SVP Marketing and Project Management

Molly.Halliday@OperationFINALLYHOME.org

## WEBSITE & SOCIAL MEDIA

OperationFINALLYHOME.org contains each of our builds and has a special page set up for donations by build. In addition, Operation FINALLY HOME will offer social media and online promotional support surrounding a home build, including dissemination of project information via the organization’s social media channels and interactive assets. Operation FINALLY HOME may also partner with the builder and/or project sponsor to disseminate build information via their channels as well.

Operation FINALLY HOME recommends that builders take photographs throughout the build. These photos may be shared via Operation FINALLY HOME and builder’s social media channels to keep community supporters/followers informed and excited about build progress.

Community involvement is an essential part of each home that we provide and members of the community are encouraged to join in every part of the process. Local community organizations, clubs, churches, and businesses often participate in fundraising events or organize their own. We welcome everyone to participate in each project we undertake. Community involvement and Operation FINALLY HOME go hand in hand.

During a typical build, Operation FINALLY Home will provide the following:

Media Advisory for each Pillar Event: Surprise, Groundbreaking, Notes of Love, and Dedication

Following the event, Operation FINALLY HOME will send a summary of broadcast media who covered the event.



# Fundraisers + Sponsorships

## FUNDRAISING

Given the current Operation FINALLY HOME projects and the opportunity for many more, fundraising is and will continue to be an important aspect of what Operation FINALLY HOME does in meeting our mission of providing custom-built, mortgage-free homes to America's military heroes. Operation FINALLY HOME maintains a nonprofit 501(c)(3) status to allow for tax-deductible contributions.

## SIGNATURE FUNDRAISING EVENTS

With the many relationships that Operation FINALLY HOME has developed, we have had the opportunity to hold a number of signature fundraising events across the country. In 2016, we surprised a veteran and his family at the Craig Morgan American Stories Tour concert in Warsaw, Indiana. Craig Morgan will continue as an Operation FINALLY HOME ambassador with his American Stories Tour throughout the United States. These signature fundraising events will be instrumental in meeting our mission of providing custom-built, mortgage-free homes to America's military heroes.

## LOCAL FUNDRAISING EVENTS

Local fundraising events along with local build projects are at the heart of what Operation FINALLY HOME does. In addition to helping raise funds for specific local builds, these events allow us to market and promote the build as well as to provide volunteer opportunities for those not directly involved in constructing the home. They are also an opportunity to recognize the builder and sponsor and to promote the mission of Operation FINALLY HOME. These events can include golf tournaments, fishing tournaments, skeet shoots, and concerts. In many cases, we hope to establish these local fundraising events as annual events, with the first event supporting the local build and subsequent events supporting other Operation FINALLY HOME projects around the country. This will help further strengthen the community by allowing them to have an impact not only locally, but across the nation.





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## PRIMARY HOME SPONSORS

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In the case that a company is the primary home sponsor for a particular project, there are several functions and activities that the company will participate in throughout the build process. Primary home sponsors typically take on the responsibility for planning and hosting any fundraising events that will be used to cover construction costs and will work with Operation FINALLY HOME to approve these events. They will also be involved in the Town Hall meeting, Surprise announcement, Groundbreaking, and Dedication ceremonies, as well as promoting the project throughout construction.

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## CORPORATE SPONSORSHIPS

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Corporate sponsorships are essential to the functioning of Operation FINALLY HOME and there are several ways that sponsors can help. In some cases, companies become primary home sponsors, providing monetary donations to cover the entire cost of a specific project. In other cases, sponsors can contribute to projects either through monetary donations to the Operation FINALLY HOME general fund or through donations of building materials and/or labor. In either case, these sponsors provide invaluable resources that allow us to meet our mission.



## MANAGEMENT TEAM

### DAN WALLRATH

Founder

### RUSSELL L. CARROLL

Executive Director

### DR. LARRY ADAMS-THOMPSON

Senior Vice President Family  
Matters and Veteran Outreach

### MOLLY HALLIDAY

Senior Vice President Marketing  
and Project Management

### DANIEL VARGAS

Vice President  
Community Outreach

### LEE KIRGAN

Vice President Project Management

### ASHLEIGH CHESSER

Director of Administration  
and Controller

### KATIE HERRIES

Director of Donor Engagement

## BOARD OF DIRECTORS

### DAN WALLRATH

Co-Chairman of the Board

### CAROL WALLRATH

Co-Founder and Board Member

### AARON WALLRATH

Co-Chairman of the Board  
*Aaron Wallrath Custom Homes*

### MAJOR GENERAL

### JERRY D. ICENHOWER

Vice-Chairman of the Board  
*U.S. Army Reserves (Ret)*

### CHARLES ARNOLD

Board Secretary

### TERRY A. COLLINS

Board Treasurer  
*Dynamic Builders*

### GARY HENLEY

Board Member  
*Henley Homes, Inc.*

### LANA HENLEY

Board Member  
*Henley Homes, Inc.*

### J.R. MARTINEZ

Board Member  
*Actor, motivational speaker  
and former U.S. Army Veteran*

### KEN SMITH

Board Member

### TONI COLLETT

Board Member  
*Hurricane Construction*

### CORPORATE OFFICE

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Ste. 115-606  
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 OPERATIONFINALLYHOME.ORG

## OUR MISSION

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**A**t Operation FINALLY HOME, we provide homes and home modifications to America's military Heroes and the widows of the fallen who have sacrificed so much to defend our freedoms and values. We bring together corporate sponsors, builder associations, builders, remodelers, developers, individual contributors, and volunteers to help these Heroes and their families by addressing one of their most pressing needs—a place to call home.

## OUR VISION

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**W**ith faith in God and determined action, we aim to have hundreds of homes built across the nation for our heroes, those who have sacrificed while wearing America's uniform in defense of our freedoms and values, helping them get their lives back on track after the hardships they have faced. We want Operation FINALLY HOME to be a nationally recognized charity and a household name that inspires others to help in our cause.

