# Index

National Officers, NEC’s & Chairmen .............................................................. 1
State Department Commanders and Adjutants ............................................ 2
VA Contact Information ................................................................................... 3
2015 Bylaw Changes ....................................................................................... 4
2015 Membership Program ............................................................................. 6
Mailing Calendar .............................................................................................. 7
Membership Application Directions ............................................................... 9
Membership & Activity Reports ...................................................................... 11
Distribution Reports ....................................................................................... 12
Indebtedness Statement .................................................................................. 13
Quota Calculation and Transfer Form ............................................................ 14
Warrant/Voucher/Check Request ................................................................. 15
Warrant/Voucher/Check Request Template ................................................... 16
Communication Tools .................................................................................... 17
DAV Auxiliary Web Page Explanation ........................................................... 18
Generating Reports ....................................................................................... 20
Frequently Asked Questions (FAQ) ............................................................... 22
990-N e-Postcard Frequently Asked Questions (FAQ) .................................. 28
990-N e-Postcard Step-by-Step Instructions ................................................... 30
Apply for an Employer Identification Number (EIN) ...................................... 32
Reinstatement of Exempt Status .................................................................... 33
Unit Officer Duties .......................................................................................... 34
Unit Minutes .................................................................................................. 37
Unit Treasurer’s Report .................................................................................. 39
Unit Elections .................................................................................................. 41
Officer Report ................................................................................................ 42
Guidelines to Complete an Audit ................................................................... 43
Financial Report ............................................................................................. 44
Supplement to State Bylaws ........................................................................... 46
State Convention Procedures ...................................................................... 47
Budget Sample ............................................................................................... 48
State Officer Duties ....................................................................................... 49
SEC Meeting Procedure ............................................................................... 53
Submitting a Resolution ............................................................................... 55
PNC Award Form ........................................................................................... 57
NEC Duties ..................................................................................................... 61
Fund Raiser Information ................................................................................ 63
Auxiliary Logo Information .......................................................................... 64
Retention of Records ..................................................................................... 65
Reactivating a Unit Charter .......................................................................... 66
Label Request Form ....................................................................................... 67
Procedure for Disbanding a Unit ................................................................. 68
Direct Deposit Form ...................................................................................... 69
Report Forms ................................................................................................. 70
2015-2016 National Officers
National Commander ........................................... Linda S. Stake
National Senior Vice Commander ........................... Frances J. Costa
National 1st Junior Vice Commander ...................... William Craig Johniken
National 2nd Junior Vice Commander ....................... Ellen L. Timmerman
National 3rd Junior Vice Commander ....................... Diane J. Franz
National 4th Junior Vice Commander ...................... Lynn Helms Prosser
National Judge Advocate ................................... Donna M. Adams
Immediate Past National Commander .................... LeeAnn B. Karg

2015-2016 National Executive Committee Members
NEC 1st District .................................................. Lillian R. Halpin
NEC 2nd District ................................................ Josephine Rivera
NEC 3rd District ................................................... Sylvia Heath
NEC 4th District .................................................. Sarah M. Kashner
NEC 5th District .................................................. Loretta J. Nosko
NEC 6th District .................................................. Carol L. Simmons
NEC 7th District ................................................ Delphina M. Bare
NEC 8th District ................................................ Linda Bailey
NEC 9th District ................................................ Shirley Hill
NEC 10th District ............................................... Carol J. Lee
NEC 11th District ............................................... Denise Proffitt
NEC 12th District ............................................... Rose Williams
NEC 13th District .............................................. Linda S. Bratcher
NEC 14th District .............................................. Joyce Jefferson
NEC 15th District .............................................. Breanne Chandler
NEC 16th District .............................................. Julie Weissman-Steinbaugh
NEC 17th District .............................................. Beth V. Maughan
NEC 18th District ............................................... Rosie M. McDuffie
NEC 19th District ............................................... Delores D. Knapp
NEC 20th District .............................................. Mary S. Bergeron
NEC 21st District ............................................... Kimberly Stake

2015-2016 Chairmen/Appointees
Americanism ....................................................... Diane J. Franz
Community Service ............................................. Lynn Helms Prosser
History ............................................................ Joyce Humes
Hospital .......................................................... Theresa Grabowski
Junior Activities ............................................... Darlene Spence
Legislative ....................................................... Ellen L. Timmerman
Mae Holmes ...................................................... Frances J. Costa
Membership ...................................................... William Craig Johniken
VAVS Representative ......................................... Nancy O. Mooney
VAVS Deputy ................................................... Elizabeth Eldridge
Chaplain ........................................................... Aura-Lee Nicodemus
Sergeant At Arms ............................................. Karla A. Schwartz
Education Scholarship Fund Chairman .................. LeeAnn B. Karg
Interim Constitution and Bylaws Chairman .............. Christina L. Fairin
Interim Constitution and Bylaws Committee ............. Judy M. Steinhein
Interim Constitution and Bylaws Committee ............. Delores A. Roussey
<table>
<thead>
<tr>
<th>State</th>
<th>Commander</th>
<th>Adjutant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>Danny Doss</td>
<td>Carolyn Harris</td>
</tr>
<tr>
<td>Arizona</td>
<td>Lucy Garza</td>
<td>Sharon Linton</td>
</tr>
<tr>
<td>Arkansas</td>
<td>Lillie Williams</td>
<td>Linda Stake</td>
</tr>
<tr>
<td>California</td>
<td>Samantha Galliher</td>
<td>Julie Weissman-Steinbaugh</td>
</tr>
<tr>
<td>Colorado</td>
<td>Leslie Sandoval</td>
<td>Susan Miller</td>
</tr>
<tr>
<td>Delaware</td>
<td>Vivian Starnes</td>
<td>Sarah Kashner</td>
</tr>
<tr>
<td>Florida</td>
<td>Shirley Kirkland</td>
<td>Diane Franz</td>
</tr>
<tr>
<td>Georgia</td>
<td>Jeri Diehl</td>
<td>Linda Jimmerson</td>
</tr>
<tr>
<td>Hawaii</td>
<td>Heidi Shiozaki</td>
<td>Cheryl Kamlahara</td>
</tr>
<tr>
<td>Idaho</td>
<td>Cora Stamper</td>
<td>Marline Kitchens</td>
</tr>
<tr>
<td>Illinois</td>
<td>Carla Raymond</td>
<td>Kathryn Pasternik</td>
</tr>
<tr>
<td>Indiana</td>
<td>Patti Bloom</td>
<td>Tana Penland</td>
</tr>
<tr>
<td>Iowa</td>
<td>Melissa Pierce</td>
<td>Kathy Weatherly</td>
</tr>
<tr>
<td>Kansas</td>
<td>Ardith Dillard</td>
<td>Marcella Storey</td>
</tr>
<tr>
<td>Kentucky</td>
<td>Rachel O'Connor</td>
<td>Arlene deCorte</td>
</tr>
<tr>
<td>Louisiana</td>
<td>Winona Sepulvado</td>
<td>Carolyn Sensat</td>
</tr>
<tr>
<td>Maine</td>
<td>Becky Ackley</td>
<td>Katherine Hodnett</td>
</tr>
<tr>
<td>Maryland</td>
<td>Claudette Holt</td>
<td>Carol Simmons</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>Allen Herrick</td>
<td>Elizabeth Eldridge</td>
</tr>
<tr>
<td>Michigan</td>
<td>Teresita Morey</td>
<td>Linda Walters</td>
</tr>
<tr>
<td>Minnesota</td>
<td>Laurie A. Pekarik</td>
<td>LeeAnn Karg</td>
</tr>
<tr>
<td>Mississippi</td>
<td>Charlene Williams</td>
<td>Juanita Upton</td>
</tr>
<tr>
<td>Missouri</td>
<td>Mary Cummings</td>
<td>Linda Gerke</td>
</tr>
<tr>
<td>Montana</td>
<td>Darlene Hopper</td>
<td>Marjorie Purkett</td>
</tr>
<tr>
<td>Nebraska</td>
<td>John Kenney</td>
<td>Rebecca Bowman</td>
</tr>
<tr>
<td>Nevada</td>
<td>Nancy Michalski</td>
<td>Carolyn J. Walker</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>Jeanne Gideon</td>
<td>Frances Clevette</td>
</tr>
<tr>
<td>New Jersey</td>
<td>Bennie Issac</td>
<td>Edna Iverson-Long</td>
</tr>
<tr>
<td>New Mexico</td>
<td>Victoria Salazar</td>
<td>Ellen Timmerman</td>
</tr>
<tr>
<td>New York</td>
<td>Cheryl Connors</td>
<td>Theresa Grabowski</td>
</tr>
<tr>
<td>North Carolina</td>
<td>Sandra Head</td>
<td>Connie King</td>
</tr>
<tr>
<td>North Dakota</td>
<td>Patricia Resler</td>
<td>Judy Steinhouse</td>
</tr>
<tr>
<td>Ohio</td>
<td>Judy Davis</td>
<td>Joyce Hutchinson</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>Jamie Parnell</td>
<td>Linda Oliver</td>
</tr>
<tr>
<td>Oregon</td>
<td>Jerald Royse, Sr.</td>
<td>Christina Fairin</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>Lori Clair</td>
<td>Laurie Stopyra</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>Sally Ann Campagnone</td>
<td>Donna M. Folcarelli</td>
</tr>
<tr>
<td>South Carolina</td>
<td>Azzie Lee Hill</td>
<td>Geraldine Evans</td>
</tr>
<tr>
<td>South Dakota</td>
<td>Diana Peterson</td>
<td>Jacqueline Worth</td>
</tr>
<tr>
<td>Tennessee</td>
<td>Phyllis Ledbetter</td>
<td>Lynda Shepherd</td>
</tr>
<tr>
<td>Texas</td>
<td>Darlene Spence</td>
<td>Ruth Gates</td>
</tr>
<tr>
<td>Utah</td>
<td>Afton Ficarra</td>
<td>June Schow</td>
</tr>
<tr>
<td>Vermont</td>
<td>Ann Marie Greenwood</td>
<td>Aura-Lee Nicodemus</td>
</tr>
<tr>
<td>Virginia</td>
<td>Carol Avanzato</td>
<td>Linda Sneed</td>
</tr>
<tr>
<td>Washington</td>
<td>Barbara Reding</td>
<td>Crystal Tomlinson</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>Carrie Willems</td>
<td>Patricia Davis</td>
</tr>
<tr>
<td>Wyoming</td>
<td>Margaret Lucas</td>
<td>Ellen Byrd</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>Ana M. Torres</td>
<td>Margarita Maldonado</td>
</tr>
</tbody>
</table>
Important Phone Numbers

Bereavement Counseling......................................................... 1-202-461-6530
Civilian Health and Medical Program (CHAMPVA) ......................... 1-800-733-8387
Caregiver Support ................................................................ 1-855-260-3274
Debt Management Center ......................................................... 1-800-827-0648
Education .............................................................................. 1-888-442-4551
Federal Recovery Coordination Program ....................................... 1-877-732-4456
Foreign Medical Program .......................................................... 1-888-820-1756
Headstones and Markers ......................................................... 1-800-697-6947
Health Care ............................................................................. 1-877-222-8387
Homeless Veterans ................................................................. 1-877-424-3838
Home Loans ........................................................................... 1-888-827-3702
Life Insurance ........................................................................ 1-800-669-8477
National Cemetery Scheduling Office ........................................... 1-800-535-1117
Pension Management Center ..................................................... 1-877-294-6380
Presidential Memorial Certificate Program ..................................... 1-202-565-4964
Special Health Issues ............................................................... 1-800-749-8387
Telecommunication Device for the Deaf (TDD) ............................... 1-800-829-4833
VA Benefits ............................................................................ 1-800-827-1000
VA Combat Call Center .......................................................... 1-877-927-8387
Veterans Crisis Line ............................................................... 1-800-273-8255
Women Veterans ..................................................................... 1-877-222-8387

Important Websites

Burial and Memorial Benefits ..................................................... www.cem.va.gov
Caregiver Support ................................................................. www.caregiver.va.gov
Education Benefits ................................................................. www.gibill.va.gov
Environmental Exposures ........................................................ www.publichealth.va.gov/exposures
Health Care Eligibility ............................................................ www.va.gov/healthbenefits
Homeless Veterans ................................................................ www.va.gov/homeless
Home Loan Guaranty .............................................................. www.homeloans.va.gov
Life Insurance ........................................................................ www.insurance.va.gov
Memorial Certificate Program .................................................. www.cem.va.gov/pmc.asp
Mental Health ......................................................................... www.mentalhealth.va.gov
My Healthe Vet ....................................................................... www.myhealth.va.gov
Prosthetics .............................................................................. www.prosthetics.va.gov
Records ................................................................................ www.archives.gov/st-louis/military-personnel
Returning Service Members .................................................... www.oefoif.va.gov
State Departments of Veterans Affairs ....................................... www.va.gov/statedva.htm
Women Veterans .................................................................... www.womenshealth.va.gov
VA Vet Centers ....................................................................... www.vetcenter.va.gov
VA Home Page ....................................................................... www.va.gov

Source: Federal Benefits for Veterans and Dependents and Survivors
DISABLED AMERICAN VETERANS AUXILIARY
BYLAW AMENDMENTS
2015

Pages N-37 & 38, ARTICLE IX, STATE DEPARTMENTS, Section 5, second sentence: Add “on junior memberships” after “state per capita.” This sentence would then read:

Such bylaws shall not prohibit a state department from designating the number of state junior vice commanders, appointed state officers/committees, and the state per capita on junior memberships and/or state mandates.

Rationale: State Per Capitas are no longer needed as we do not have Annual Senior Memberships, so this will allow a state to start or continue assessing a per capita on junior memberships.

Page S – 5, ARTICLE III - STATE OFFICERS, Section 3: Eligibility for State Office, Paragraph 4, last sentence. Bold last sentence which reads:

Any elected state officers who serve on the state executive committee and are entitled to vote shall not serve as the state executive committee member of the unit.

Rationale: To emphasize that SEC’s cannot be line officers and vice versa.

Page S-18, ARTICLE VIII – FINANCES. Add new Section. New Section 7 shall read as follows:

Section 7: Accumulation of Funds

State Departments may not accumulate funds, whether for service purposes or otherwise, in excess of three (3) times the expenses of their last fiscal year. State Departments whose accumulated funds exceed this amount must comply with this Section by expending such excess within a reasonable time.

The expenditure of the excess accumulated funds must be for service purposes.

Rationale: This new section is to comply with DAV bylaws restricting the National Office and its subordinate units from accumulating excess unrestricted funds that are not being spent on current or future needs and resources in planning service-related programs.

Page S-18, ARTICLE IX-SUPPLEMENT TO STATE BYLAWS - STATE STANDING RULES, Section 1, Paragraph 2. Delete the words “during the first business session” and substitute with “a business session of the state convention.” This paragraph would then read:

Over
The state standing rules may be amended by a majority vote of those registered and voting during a business session of the state convention.

**Rationale:** Due to the starting times of many state conventions, it is not possible to read and vote on proposed changes to state standing rules at the first business session. Many conventions start with a joint session with the DAV and this may not allow adequate time to read/vote on these changes at the first business session. Even the National Convention does not read and adopt bylaw changes at the first business session of the convention.

**Page U-15, ARTICLE XV – UNIT FINANCES AND DUES. Add new Section. New Section 5 shall read as follows:**

**Section 5: Accumulation of Funds**

Units may not accumulate funds, whether for service purposes or otherwise, in excess of three (3) times the expenses of their last fiscal year. Units whose accumulated funds exceed this amount must comply with this Section by expending such excess within a reasonable time.

The expenditure of the excess accumulated funds must be for service purposes.

**Rationale:** This new section is to comply with DAV bylaws restricting the National Office and its subordinate units from accumulating excess unrestricted funds that are not being spent on current or future needs and resources in planning service related programs.

**Page U-25, MEMBERSHIP INITIATION CEREMONY, Last Paragraph. Delete the sentence which reads: “You are now entitled to all the rights and privileges of this organization.”**

**Rationale:** The Membership Initiation Ceremony is no longer a required ceremony for a member to be considered in good standing; therefore, this sentence is no longer necessary.
2015-2016 Membership Recruiter Incentives

Top Recruiter will receive $200

- Involve the youth community. Junior membership is complimentary through age 17, or get an early start on a Junior life membership.

Certificate issued for up to $30 in DAV Store merchandise for recruiting 25 new life members

Membership applications available in booklets of 25 or singles. Contact national headquarters for a supply to keep on hand. Together, we can build a larger and stronger membership and let our voices be heard.

DAV & DAV Auxiliary – Partners Pulling Together

- A $20 down payment starts a new life membership with an indefinite period of time to pay the balance.

<table>
<thead>
<tr>
<th>Age</th>
<th>Life Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth – 30</td>
<td>$250</td>
</tr>
<tr>
<td>31 – 45</td>
<td>$230</td>
</tr>
<tr>
<td>46 – 60</td>
<td>$200</td>
</tr>
<tr>
<td>61 – 70</td>
<td>$180</td>
</tr>
<tr>
<td>71 – 79</td>
<td>$140</td>
</tr>
<tr>
<td>80 and over</td>
<td>complimentary</td>
</tr>
</tbody>
</table>

DAV Auxiliary

Partners Pulling Together

DAV Store

Membership Recruitment Certificate issued for recruiting five new life members
Calendar of Special Mailouts from National Headquarters

Listed below is a calendar giving approximate times when certain information is mailed out from National Headquarters

January
- Units and State Departments – receive a membership listing of their unit members as of December 31.
- State Departments – receive notification to contact the indebted units within their state in order that the unit can pay what is owed and be cleared for voting at state and national conventions.
- Units – Officer Reports, Financial Reports, Financial Report Guidelines, Audit Guidelines are sent to the unit adjutants.

February
- Units and State Departments – will be contacted concerning units that have failed to submit officer reports for the current membership year. Those units will be placed on a six-month hold.
- State Departments – are notified of the national representative authorized to attend their national convention.

March
- Units – receive information concerning the upcoming national convention and are reminded to elect delegates and send the yellow delegate listing to national headquarters.
- State Departments – receive a packet of information regarding to the state convention proceedings to include: yellow delegate listing, state adjutant duties, supplement to state bylaws, state officer report, audit guidelines, state delegate/escort form, financial report form with instructions.

April
- State Departments – will receive a letter advising them that a state payout will be forthcoming in the form of a direct deposit. The letter advises the amount to be paid per member based on total membership as of the previous June 30 (junior and complimentary life members are excluded).
- State Commander of the hosting national convention state (hosting state only; not all states) – will receive a letter requesting the names of two persons designated to carry the state colors at the national convention.

May
- State Departments – are notified if a member from their state was the recipient of the PNC Outstanding Member Award or if member/s received honorable mention certificates.
- State Delegates to the national convention will receive a letter regarding practice for the opening national convention business session.
State Departments – receive a letter and a direct deposit advice indicating the amount of state service payout funds deposited into the state department’s account.

June

- Units and State Departments – receive information regarding the upcoming National Fall Conference.
- State Departments – will receive a letter requesting that one door prize be brought to the national fall conference from their state.
- Units & State Departments – will be notified if a financial report is not on file for the convention year. The notification will advise them that if the report is not received by a specified date (prior to the national convention) the unit or state department will not have representation at the convention and the elected delegates will register without voting privileges.
- Units & State Departments – will be notified if they are financially indebted to the national organization. As above, elected delegates will not be seated as such and will register without voting privileges.

July

- Units & State Departments – will receive a Membership listing as of July 1.
- National Convention Delegates – will receive a credential letter to bring with them to national convention.

October

- State Department – will receive a form requesting state convention information and representative requested.

November

- Report Forms – Sent to state adjutant with instructions to reproduce the reports and send to the units within their state.
- PNC Outstanding Member of the Year Award Form – Sent to the unit adjutants.
- VAVS Certifications will be requested and are to be submitted to national headquarters by the state commander with recommendations for the VAVS Representatives at the various VA Medical Centers within their state during the odd-numbered years (2017, 2019, 2021, etc.)
Completing a DAV Auxiliary Membership Application

Please Print Legibly!

1. Date of application completion.
2. Unit Number (this is the Auxiliary unit you wish to join). If left blank, the membership will be placed in national at-large.
3. State where unit is located.
4. First Name, Middle Initial, Last Name.
5. Date of Birth
6. Full street address, city, state, zip code.
7. Applicant’s phone number
8. Email Address, if applicable
9. Check appropriate box based upon your membership/payment preference:
   - New Life – for new life membership application. (Our bylaws allow for an extended number of years to complete payment of the life membership.)
   - Life Payment – if making payment toward existing life membership.
   - New Junior – for new Junior membership application (Ages birth to 17).
   - Junior Life – for new life memberships for children 17 years and younger.
   - Junior Life Payment - if making payment toward Junior life membership.
10. Enter the amount being paid on this membership.
   - Life membership minimum down payment is $20, but the member may pay any amount over and above the minimum (or the entire life membership amount).
   - Junior membership are complimentary through age 17, or a junior life membership can be started with a $20 down payment.
   - Date of birth is required! Needed to determine life membership amounts (if not provided at the time of application, the maximum life amount of $250 is defaulted. Also required to determine Junior membership eligibility).
11. Name of person applicant is eligible for membership through.
12. Applicant’s relationship to the person eligible through. Example: spouse, parent, child, grandparent, grandchild, aunt, uncle, cousin, in-law, etc.
13. Sponsor’s signature is the person who is recruiting the new applicant.
14. Membership number of sponsor. This is required to receive credit for recruiting a new senior member.
15. Applicant’s signature.
16. Applicant’s credit card information. (If the credit card is not in the applicant’s name, please provide the credit card owner’s information (name, address, phone number) on back of application.

17. Member’s Receipt to be completed by sponsor or person receiving the membership application/payment.

New Applications are available! They are available in singles, or triplicate books of 25. To order, please contact National Headquarters at 877.426.2838, option 5; or send an email with your preference to dava@dav.org.

Original (white) copy - Mail the original application, with payment, to:
DAV Auxiliary National Headquarters, 3725 Alexandria Pike, Cold Spring, KY 41076.

If triplicate forms are used:
Yellow copy – Send to respective DAV Auxiliary State Department.
Pink copy – For unit files.
**Membership Listing –**

**Membership List By DAV-Dept-Chapt**

**STATE – Unit #**

*Ordered by Member Name*

<table>
<thead>
<tr>
<th>Membership #</th>
<th>Member Name</th>
<th>Address</th>
<th>City</th>
<th>St</th>
<th>Zip</th>
<th>Home Phone</th>
<th>Bal Status</th>
</tr>
</thead>
</table>

* Membership Type:
  - F – Full Paid Life Member
  - P – Part-Life Member
  - J – Junior Member

**Note: Deceased members are also indicated as canceled.**

***Member Count* at the bottom left of the *Membership List* indicates the number of members affiliated with the unit, but may not reflect the total paid members for quota purposes. Refer to the *Status* column for member status.

---

**Activity Report –**

**Membership Activity Report**

**STATE - # - Unit Name & #**

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Membership Number</th>
<th>Date information entered into system</th>
<th>Activity Date</th>
<th>Activity</th>
</tr>
</thead>
</table>

- New
- Transfer In
- Deceased
- Reassigned (usually from National at Large)
- Convert to Life Due to Age 80
- Payment
- Transfer Out
- Address Change

- Address Change Information:
  - Claimed = valid address
  - Unclaimed = invalid address
  - New Membership Information (life, part-life, junior)
  - Payment Amount and Method (check, credit card, etc.)
**Distribution Report** – Membership distribution is performed on a quarterly basis. This report indicates membership dues paid and respective distribution amounts.

**Top Portion Explained** -

**Distribution Report**

- **State** – **State #**
- **Unit Name**
- **Number**
- **Month/Year**

**Last Name, First Name**

**Membership Number**

**New Payment**

**Date of Payment Processing**

**Amount Distributed to National**

**Amount Distributed to State**

**Amount Distributed to Unit**

**Life membership details**

**Lower Section Explained** -

**Unit Name & Number**

**Amount to be Paid**

**Amt. of Direct Deposit**

**Active/On Hold/At-Large**

**Total Receipts**

**National**

**Dept.**

**Unit**

**Undistributed**

**Total Life Membership Payments Processed**

**National / Dept. / Unit Distribution Amount**

**Applies to states with no dept. and for National at large**

**Bottom Section Explained** –

**Last Year Members**

**Curr. Senior Members**

**Curr. Junior Members**

**Curr. Life Members**

**Total Current Members**

**Current Quota**

**Quota Status**

**Total Membership as of 6/30 previous year**

**Current Total of Active Junior Members**

**Current Total of Active Life Members**

**Total of All Active Members (Jr. & Life)**

**Quota**

**B = Achieved Quota**

**R = Achieved Last Yr’s Total Mbshp., but has not made Quota.**

**- = None of the above**
### Indebtedness Statement Explained

This statement is sent to unit adjutants in July of each new membership year and then on a monthly basis from January through June (if the unit is monetarily indebted to the national organization). A national mandate is charged annually to cover the education scholarship fund, the service support fund, and national convention expenses.

Each July 1 a distribution of $.50 is made to the unit for each life member. The national mandate is automatically deducted from the July 1 distribution, provided the unit has sufficient life membership to make adequate distribution to cover the national mandate. In cases where the July 1 distribution does not cover the full $25 mandate amount, an indebtedness statement is generated.

To satisfy this balance, the unit can either submit a check to pay the amount owed or it can wait to see if enough membership is processed during following months to make adequate distribution. If the latter is decided, measures should be taken to ensure the balance is paid prior to state and national convention in order to keep your unit in good standing should you have delegates attending.

#### Example

<table>
<thead>
<tr>
<th>Dept. #</th>
<th>Unit #</th>
<th>Description</th>
<th>Details</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>State #</td>
<td>Unit #</td>
<td>Balance Carried Forward (See #1)</td>
<td>$26.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Current Charges (See #2)</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total Amount Due (See #3)</td>
<td></td>
<td>$26.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Total Amount Deducted from Distribution (See #4)</td>
<td></td>
<td>$3.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Previous Year Balance Due (See #5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mandate (See #6)</td>
<td>$23.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bad Check Amount (See #7)</td>
<td>$1.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other (See #8)</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Balance Due National as of mo/day/year (See #9)</td>
<td></td>
<td>$24.00</td>
</tr>
</tbody>
</table>

1. **Balance Carried Forward** – Typically, this is the balance carried forward from the previous month. Note: the year beginning (July 1) amount will also include any amount owed as of year-end June 30, plus the $25.00 national mandate owed as of year beginning July 1. In the example above, $1.00 was carried forward from the previous membership year and on July 1 the national mandate of $25.00 was applied.

2. **Current Charges** – Note: This field is not currently in use.

3. **Total Amount Due** – Sum of items #1 and #2 (if applicable).

4. **Total Amount Deducted from Distribution** – This amount reflects any deductions from membership distribution that have been applied (membership year to date) toward the indebtedness amount. In the example above, $3.00 is the result of unit per capita distribution from membership dues paid during that particular month and subsequently applied toward the indebtedness.

5. **Previous Year Balance Due** – Note: This field is not currently in use.

6. **Mandate** – Unpaid mandate amount owed by the unit. In the example above, the unit had a distribution deduction of $3.00, leaving a mandate balance due of $22.00.

7. **Bad Check Amount** –
   - If a unit check is returned for a reason such as insufficient funds, the unit then becomes indebted for that amount.
   - If a member’s personal check (for membership dues) is returned for a reason such as insufficient funds, the amount paid to the unit as their share of that membership distribution, if applicable, will be recouped by adding to the unit’s indebtedness as described in the example above.

8. **Other** – Reserved for unique circumstances.

9. **Balance Due National** – The amount of indebtedness owed by the unit to the national organization.
Quota Calculation

The unit quotas are based on the June 30 population, less cancelled, deceased, and transferred-out members. Add in any transferred-in members.

Units with less than 50 members will have a quota increase of one (1) additional member. Units with 50 or more members will have a quota increase of one (1) additional member per each 25 members.

Example: Based on the June 30 total members (minus, cancelled, deceased, transferred out and plus transferred in)

Units with 1 – 49 members will add 1 member
Units with 50 – 74 members will add 2 members
Units with 75 – 99 members will add 3 members
Units with 100 – 124 members will add 4 members
Etc.
Unit
Warrants/Vouchers/Check Requests

The national bylaws provide for the proper procedure when issuing checks from unit accounts.

_Unit funds may only be expended upon approval of unit members at a regular business meeting unless otherwise specified in Unit Standing Rules._

**Procedure** —

**Unit Approves Expenditure**
(Or disbursement is addressed in Unit-Approved Standing Rules)

- **Adjutant initiates and signs request for check.** (Jr. Vice Commander may sign in absence of Adjutant)
- **Warrant/Voucher/Check Request Example**

- **Unit Commander cosigns the request for check.** (In Commander’s absence, the Sr. Vice Commander may sign since they are the third signature on all unit bank accounts.)
- **Upon receipt of the properly authorized and signed request for check, Treasurer shall prepare and sign the check.** (In the Treasurer’s absence, the Senior Vice Commander shall cosign checks.)
- **Unit Commander then cosigns the check.** (In the absence of the Commander or Treasurer, the Senior Vice Commander shall cosign checks.)

*Reference: Disabled American Veterans Auxiliary National Constitution and Bylaws, Unit Section, Article XI, Sections 1 - 4*
The DAV Auxiliary is growing every day, and that includes the way that they communicate with members of all ages. Below you will find some Internet Communication Tools used by the DAV Auxiliary, and how you can participate!

**DAV Auxiliary Website** – [www.davauxiliary.org](http://www.davauxiliary.org)
The DAV Auxiliary website offers a variety of information for both members and potential members. Downloadable resources include annual report forms, officer reports, financial reports, Education Scholarship application, Auxiliary Manual, Auxiliary Constitution and Bylaws, and Publicity Guide. The website also offers contact information, links to social media outlets, information on joining the DAV Auxiliary, and membership benefits.

**E-Mail Newsletter** – Auxiliary information delivered right to your inbox!
By signing up at [www.davauxiliary.org](http://www.davauxiliary.org) for the E-Mail Newsletter, you’ll be able to get direct communication from the Auxiliary regarding events, reports, news, and unit happenings. E-mails are sent twice monthly, so don’t delay in signing up! Just click “Join Email List” on the DAV Auxiliary website homepage and follow the steps to sign up!

**DAV Auxiliary on Facebook** - [https://www.facebook.com/DAVAHQ](https://www.facebook.com/DAVAHQ)
By “liking” the DAV Auxiliary on Facebook, you’ll receive updates on your Facebook newsfeed, interact with members, share your stories, and learn more about the DAV Auxiliary programs. Not yet a Facebook member? Create a simple and quick profile by using your e-mail address and a unique password.

**DAV Auxiliary on Twitter** - [https://twitter.com/DAVHQ](https://twitter.com/DAVHQ)
Do you enjoy tweeting? Well come on over to Twitter and follow the DAV Auxiliary! Interact with members of our organization and others; explore unique articles and information to help Veterans and their families, all while learning about what the DAV Auxiliary can do for you. Not sure how to become a Twitter Tweeter? Getting started is easy – just supply your e-mail, a unique username and a password, and start following us today!

**DAV Auxiliary on Flickr** - [https://www.flickr.com/photos/davahq/](https://www.flickr.com/photos/davahq/)
Looking for pictures of what Auxiliary members are doing? Look no further! The DAV Auxiliary can now be followed on Flickr. Submit your pictures to dava@dav.org – all pictures are welcomed and encouraged!
The DAV Auxiliary is excited to implement a website that is easy to use for members and shares information for future members. Site enhancements are always under consideration in an effort to present current and appropriate information.

The Membership Tab will include the following information:

**Join DAV Auxiliary**
- Understanding membership in the DAV Auxiliary
- Definition of eligibility
- Become a DAV Auxiliary member online
- Download and print membership applications
- Download and print Auxiliary brochures

**Junior Member Page**
- A page dedicated to everything junior member related

**Membership Benefits**
- What can your life membership do for you? Check out these benefits.

**Incentives**
- Learn about this years’ recruitment program, and how you can earn incentives!

**DAV Auxiliary Programs**
- Learn more about the Service Support Program and Education Scholarship

**Resources**
- Find a unit
- Membership System access
- Officer Roster – National Officers, NEC’s & Alternates, State Commanders, State Adjutants, and National Appointees.
- Membership Summary
- Junior Template
- Label Request Information

- Auxiliary items for sale
- Annual report forms
- 990-N e-Postcard information – including filing and establishing a new account
- Officer report form
- Financial report form
- Membership transfer form
- PNC Award form

**Publications**
- Auxiliary Manual
- Constitution and Bylaws
- Fall Conference Booklet

- Publicity Resource Guide
- DAV Auxiliary Strategic Plan
The News and Events Tab will include the following information:

**News**
- PDF download of the monthly Headquarters News

**Events**
- Information on the annual National Convention, including dates, tentative agenda, hotel and travel information, and much more.
- Information on the annual National Fall Conference, including dates, hotel information, and the official announcement on the event.

The Volunteer Tab will include the following information:

**Volunteer Information**
- This tab will open a new webpage through www.dav.org, and offers information on various DAV volunteer programs

The Frequently Asked Questions (FAQ) Tab will include the following information:

- A list of the most frequently asked questions by members of the DAV Auxiliary and future members of the organization. Further explains documents such as indebtedness statements and membership listings, membership questions, “on hold” statuses, and much more.

The Homepage offers easy access to all social media outlets.
Generating Reports

Commanders, Senior Vice Commanders, and Adjutants of units and state departments have system access to generate various reports.

- Log in to www.davmembers.org
- Enter your membership number and password. First-time users are to enter their date of birth as the initial password. If this does not gain system access, contact national headquarters and a staff member will reset your password.
- On the left side of your screen, click on the Request For Information tab.
- The drop-down menu may be similar to the following:

  - **Annual Financial Report** – Enter the unit/state fiscal year ending date (must be exact). Generate. The result will be the financial report with the specified fiscal year ending date requested.
  - **Chapter/Unit List** – Provides a unit listing for your particular state with adjutant name and contact information and the annual dues amount charged by each respective unit. Search parameters can be selected to suit your search needs under the Chapter/Unit Status drop-down menu. Print options allow the user to print a list or a desired label format for mailing.
  - **Chapter/Unit Status** – Produces a list of units within the state and their respective status. Search parameters are available to suit your search needs.
  - **Direct Deposit Advice by Dept/Chap** – Handy report for determining the total amount of membership distribution made by national headquarters to report on the annual financial report or to compare to bank records. Enter the fiscal year date range and select generate.
 **Membership List** – Creates a list of the members and their respective status within a particular unit. Search parameters are available to meet specific search needs. Note the check mark next to Print Labels. Deselect the check if you are generating a membership listing. Do not remove the check mark if you choose to print labels (5160 compatible).

 **Membership Standings** – Not used. This is a DAV report only.

 **Membership Activity Report** – Membership activity is listed on the this monthly report and mailed to the units. This particular report can be generated with a specific date range.

 **Officer Report** – Produces the officer report data on file at national headquarters.

 **Population Summary** – Generates a population summary of all units within your state department. This report can be run daily and reflects membership information as of the previous working day.

 **Recruitment** – Produces an alphabetical list of Recruiters and the respective number of new members sponsored. Hint: 1) Select DAVA. 2) Enter correct fiscal year (2015 for the 2015-2016 year, 2016 for the 2016-2017 year, etc.) 3) Enter a “1” in the *Minimum DAVA Recruited* field.

 **Recruitment – Dept/Chapter** – Do not use.
Frequently Asked Questions

Q. **What is the DAV Auxiliary?**
A. The Disabled American Veterans Auxiliary is an organization of men, women, and children with a desire to assist disabled veterans and their families across the United States and Puerto Rico. The organization was founded in 1922 and has grown to over 100,000 members. These members volunteer at Veteran Administration Medical Centers, Nursing Homes, Schools, Churches, Communities, and also promote Patriotism and reach out to legislators for concerns related to veterans and their families. The DAV Auxiliary is founded on the mission of “Making a difference in the lives of disabled veterans and their families.”

Q. **Why should I join the DAV Auxiliary?**
A. Your membership in the DAV Auxiliary strengthens the commitment we have to aiding veterans and their families, while allowing the opportunity to make a difference in the lives of others and themselves. Whether attending one meeting a year or becoming more active, your membership will affect the lives of many.

Q. **Who can join the DAV Auxiliary?**
A. Extended family members of an honorably discharged veteran (includes all veterans – whether disabled or not disabled) or extended family of DAV Auxiliary members may join the organization.

Q. **What are some of the programs offered by the DAV Auxiliary?**
A. Life members of the DAV Auxiliary may be eligible for a scholarship of up to $1,500, with determination of amount based on a submitted application and supporting documentation. The Service Support Program is a one-time assistance program to auxiliary members and is available to those in dire financial need who submit an application and supporting documentation for eligibility consideration. Lastly, DAVA for Kids assists with transportation expenses for military children to attend Camp Corral, a camp dedicated to children of military members for their own reflection and growth.

Q. **What type of membership is offered?**
A. A life membership can be started for $20 down, and the amount owed is based on the applicant’s age. A life membership can be paid in any amount of time, giving a more flexible payment option. A child under the age of 17 can secure a junior membership complimentary or can begin a life membership at any time for $250, with $20 down and an unlimited amount of time for repayment.

Q. **How can I find a unit near my home?**
A. There are two ways to find a unit near you. The first is by visiting [http://www.davauxiliary.org/membership/FindUnit.aspx](http://www.davauxiliary.org/membership/FindUnit.aspx), and selecting a search by zip code or state. The second is by calling the national headquarters office (877.426.2838, option #5), where staff can provide additional contact information for representatives in your state.

Q. **How can I sign up?**
A. There are many ways that you can apply! Sign up online at [www.davauxiliary.org](http://www.davauxiliary.org), or visit the website and download as many applications as you need. Members in your community will also have membership applications available for you to fill out and mail in, or you may call national headquarters and a staff member can assist you with an application and payment over the phone. National headquarters staff can also send you membership applications if you do not have internet access.
Q. **There is not a DAVA unit in my area. Can I still join the DAV Auxiliary?**
A. Yes! If no unit is specified on your application, you will be placed in the national at-large or if you prefer you can be assigned to the state at-large. You will still be supporting the organization with your membership; however, you would not have a voice or vote at a state or national convention.

Q. **Will I receive a membership card?**
A. Yes! Membership cards are sent to senior members within two to four weeks of membership processing.

Q. **Does the DAV Auxiliary offer any kind of life insurance?**
A. No, there are no insurance benefits available at the present time.

Q. **Are there any other benefits?**
A. Yes. You have access to highly-trained DAV National Service Officers who can answer your questions concerning VA benefits. Also, you can find a list of member discounts on our web site.

Q. **Will I receive the DAV Magazine?**
A. Yes. However, only one issue is sent per household.

Q. **Do units vote on acceptance of new Auxiliary members?**
A. No. Members are welcome to join the unit of their choice.

Q. **Can I hold more than one Auxiliary membership?**
A. Yes, provided the multiple memberships are not in the same state.

Q. **How can I volunteer at the local VA facility?**
A. If you attend unit meetings, ask for the name of the VAVS Representative at the facility where you wish to volunteer or call your local VAMC and speak to the Voluntary Services Department. You will be provided with information on the application process, given a tour of the facility, informed of various volunteer positions, and assisted with setting up an appointment with Voluntary Services.

Q. **How do I organize a new DAV Auxiliary unit?**
A. The DAV Auxiliary offers “How to Form” kits that offer valuable information on how to organize a new unit. The new unit will need to have approval from the DAV parent chapter and ten new senior members with complete applications and dues. National and state at-large members can also count toward the ten new member requirement. Upon receipt of the “How to Form” kit, work with your State Department for one-on-one support!

Q. **What is considered a “Membership Year?”**
A. The membership year runs from July 1 through June 30.

Q. **Can I access my membership record online?**
A. Yes. Log in to www.davmembers.org. Enter your membership number and date of birth as your password. After the initial log-in, you will be asked to establish your own password. If you encounter problems logging in, please contact the national headquarters office 877.426.2838, option 5.

Q. **How can I get a membership card replaced?**
A. Yes, should you lose your card or it is damaged, please contact national headquarters and a staff member will happily assist you. Please remember, card processing can take two to four weeks.

Q. **How do I get a bylaw book?**
A. Bylaws and other DAVA fraternal sale items (other than the Auxiliary Manual) are ordered through the DAV National Service Foundation, 3725 Alexandria Pike, Cold Spring, KY 41076, phone 859.441.7300, ext. 3252, e-mail: sales@dav.org. The constitution and bylaws are also available to view with printing capability on the website under the Membership/Publications tab.
Q. Why are bylaw books revised each year?
A. An interim committee performs an annual review of the constitution and bylaws and considers all resolution submissions. Recommendations of this committee are presented to the national convention committee and changes are adopted on the convention floor by the registered delegates. Also, changes are made to the listings of national officers, chairmen, and national executive committee members.

Q. Are units required to hold annual elections or can we just keep the same officers?
A. Each unit is required to conduct an annual election for each individual office. All officers must be installed in accordance with the DAV Auxiliary bylaws.

Q. The bylaws state all members are to be notified of elections in written form not less than ten days prior to the election. Please explain.
A. Various methods can be used for election notification: postcards, newsletters, emails, letters. If your unit sends out one newsletter a year, you can list the date of the annual election and this would be considered written notification even if it is months in advance. The important point is that all senior members must be notified.

Q. When should the transfer of possessions (belonging to the organization) from the past to the present officers/chairmen occur?
A. Outgoing officers should be prepared to turn over all records and possessions to their successor at the time of installation. On the state level, however, it may be difficult for the outgoing treasurer to turn over the checkbook until convention hotel bills are paid since the newly elected treasurer would not yet be an authorized check signer. Regardless, the outgoing and incoming officers should come to an agreement to assure a timely transition of property.

Q. Can any member attend a state or national convention?
A. Yes. However, if you want to have a voice and/or vote on the convention floor, you must be a member of a chartered unit in good standing with your dues paid and be elected as a delegate.

Q. How many meetings must a unit hold each year?
A. Units are required to hold a minimum of four meetings per year; however, units tend to find that more frequent meetings provide better productivity.

Q. My unit received an Indebtedness Statement. Please explain.
A. Units are required to pay an annual $25 national mandate which, in most cases, is deducted from the unit’s membership distribution. Should there not be ample membership distribution, an indebtedness statement is generated monthly (January through membership year-end) advising the unit as to the remaining amount owed for their national mandate.

Q. I understand units are required to submit an annual financial report. Who can serve on the audit committee?
A. The audit committee shall consist of three senior members excluding the Commander, Senior Vice Commander, Junior Vice Commander (when signing warrants, vouchers, check requests), Adjutant, and Treasurer.

Q. Who is authorized to sign on unit bank account?
A. The Treasurer establishes and maintains a bank account in the name of the Unit, Disabled American Veterans Auxiliary. The three required authorized Unit signatures shall be the Commander, Senior Vice Commander, and Treasurer.

Q. Who can contact the bank concerning the unit bank account?
A. Any of the three authorized account signers have the authority to check/review the account status.
Q. Who is authorized to sign unit checks?
A. Two signatures are required on all unit checks. Authorized unit signers are: Commander, Treasurer, and Senior Vice Commander (in the absence of the Commander or Treasurer).

Q. What is the procedure for issuing a unit check?
A. Funds can only be paid out on properly signed warrants/vouchers/check requests as voted upon by the Unit or in accord with Unit Standing Rules. The Adjutant shall initiate and sign all warrants/vouchers/check requests and have them cosigned by the Commander. In the absence of the Adjutant, the Junior Vice Commander shall sign all warrants/vouchers/check requests. The Treasurer may then issue a check. For an example of a check warrant/voucher/request, please see the DAV Auxiliary Manual.

Q. When should membership dues collected at a unit meeting be sent to national headquarters?
A. Membership dues should be sent to Auxiliary national headquarters as soon as possible to allow for timely processing and membership card mailing.

Q. Are units required to file a 990-N e-Postcard?
A. Yes! Beginning in 2007, the IRS required all non-profit units and state departments with gross receipts less than $50,000 to file the 990-N e-Postcard. Units and state departments with gross receipts of more than $50,000 are required to file IRS Form 990 (or variation of, depending on gross receipts).

Q. What happens if we do not file the 990-N e-Postcard?
A. After three consecutive years of not filing a 990-N e-Postcard, the IRS will revoke the tax exempt status of a unit or state department. Upon said revocation the affected units/state departments will be required to fill out IRS Form 1024, IRS Form 8718, submit a copy of the unit/state department charter, a copy of the national constitution and bylaws, and a fee (generally $400) to IRS for reinstatement. Copies of each must also be sent to national headquarters. Until reinstatement has been achieved the unit/state department membership distribution will be held by the national organization.

Q. How many members are required to conduct a meeting?
A. Four senior members shall constitute a quorum. One member present must be the Unit Commander or a Unit Vice Commander.

Q. Should my unit draft Standing Rules?
A. It is recommended that units establish standing rules to cover unique situations specific to that particular unit. Standing rules may be changed at any regular business meeting by vote of the unit members present.

Q. Does a Commander only vote to break a tie?
A. No. As a member of this organization, the Commander has the right to cast their vote on any issue.

Q. Who can call off a meeting?
A. If, for some reason, the Commander cannot attend a meeting, this would not be grounds to cancel a meeting as the bylaws allow for the Senior Vice Commander (or Junior Vice Commander as described in the national bylaws) to fill that role and conduct the meeting. In the event of inclement weather or other unforeseen circumstances that would prevent members from attending a meeting, these would be instances where a meeting is cancelled by the Commander with proper member notification.

Q. Can unit officers access reports in the DAVA membership system?
A. Yes. The Commander, Senior Vice Commander, and Adjutant can log in under their membership number and password. The system will recognize you as an officer and certain permissions will allow you to generate reports under the “Request for Information” tab. Contact national headquarters in the event of questions.
Q. **What do the letters F, P, and J indicate on the membership listing?**
A. This identifies the type of membership they hold. **F** = Full-paid life member; **P** = Part-paid life member; **J** = Junior member.

Q. **What do the letters Q and I indicate on the Population Summary Report?**
A. **Q** = the unit has achieved the established quota set for that membership year; **I** = this is an Independent unit that has no parent chapter.

Q. **What do the letters R and B indicate on the Distribution Report under Quota Status?**
A. These letters were established many years ago to identify unit status. **B** = the unit has achieved (Beat) Quota for the current membership year; **R** = the unit has Reached last year’s total membership, but has not met quota.

Q. **How does our unit receive communications from National Headquarters?**
A. The national organization sends monthly mailings to each unit to the attention of the Unit Adjutant. It is the Adjutant’s responsibility to see that all communications are brought to the unit meetings and made available to the Commander and members. These mailings are not the personal mail of the Adjutant and he/she is acting as the agent to receive and deliver communications. The Headquarters News monthly newsletter is posted on the web site under the News & Events tab. Back issues are also available for viewing. Members can also sign up for the E-newsletter and have mail delivered directly to their inbox. The DAV Auxiliary is also on many social media outlets, including Facebook, Twitter, Tumblr and Flickr, and these are updated on a regular basis.

Q. **How can we interest Junior members?**
A. Make junior members feel welcome by including them in unit activities. Educate them on what the DAV Auxiliary does and how they are a vital part of the future of the organization. Information on juniors can be found in the DAV Auxiliary manual and on the website.

Q. **Do we have to have a junior charter in order to sign up junior members?**
A. No, a junior charter is not required.

Q. **How do we get a charter for our Junior members?**
A. Send a request to National Headquarters with a list of the paid juniors to be on the charter. The list will be compared to the current membership list to make sure no juniors are excluded. There is no fee for a junior charter.

Q. **If a parent chapter is currently under suspension. How does that affect our unit?**
A. The chapter suspension does not include suspension of the Auxiliary unit and does not affect unit functions or voting strength at state or national conventions. If your unit approves a fund raiser, though, the parent chapter will not be able to grant approval (under suspension) and the unit must contact the DAV state department for said approval.

Q. **If a unit receives notification that they are “On Hold.” What does this mean?**
A. The reason for the hold status will be explained in a letter to the unit adjutant and/or commander. While on hold, units can meet and carry out the normal business of the unit as well as vote at state and national conventions (provided the unit itself is not indebted to the organization). The effect it will have on the unit is that fund distribution and mailings are withheld.

Q. **Does the DAV Auxiliary offer scholarships or grants?**
A. The DAV Auxiliary offers a scholarship for life members. More information is available on the website, or by calling national headquarters. The deadline for the application is March 15.

Q. **Can a DAV Chapter or DAV State Commander suspend or revoke an Auxiliary charter?**
A. No.
Q. **How does one go about applying for a national office or a national chairmanship appointment?**
A. Contact national headquarters by phone (859.441.7300, option #5) or email (dava@dav.org) and they will be happy to forward you an electronic or printed version of the application.

Q. **Our Unit is having issues and needs guidance. Who should we contact?**
A. The unit should always follow the chain of command. If an issue cannot be resolved on the unit level, the state department should be contacted for assistance. Should a state department not be able to assist in resolving an issue, it should then be brought to the attention of national headquarters.

Q. **I would like to get a supply of membership applications and brochures. What is the procedure?**
A. Please contact national headquarters or send an email to dava@dav.org with the quantity of items needed and where they should be sent. These items are free of charge and are sent from national headquarters.

Q. **Our unit/state department would like to use the DAV Auxiliary Logo. Is that possible?**
A. Yes! The logo may be used on stationery, business cards, name badges, etc. Items bearing the organization’s logo may be sold to other members at cost, but never for profit. In other words, the logo may not be used on items as a fundraiser.
990-N e-Postcard Frequently Asked Questions

Below are some of the most common questions received regarding the 990-N e-Postcard. The answer to these questions can be found online at www.irs.gov.

**Q: Please explain the 990-N e-Postcard.**
A: Under the Pension Protection Act of 2006, most small tax-exempt organizations whose gross receipts are normally $50,000 or less must file Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations not Required To File Form 990 or 990-EZ. Before this law was enacted, these small organizations were not required to file annually with the IRS. The first filings were due in 2008 for tax years ending on or after December 31, 2007.

**Q: Where do we file?**
A: Go directly to the filing site at http://epostcard.form990.org.

**Q: When should our unit file a 990-N e-Postcard?**
A: The e-Postcard is due every year by the 15th day of the 5th month after the close of your tax year (usually the same as your accounting period). For example, if your tax year ended on December 31, the e-Postcard is due May 15 of the following year. If the due date falls on a Saturday, Sunday or legal holiday, the due date is the next business day.

**Q: How much does it cost to file a 990-N e-Postcard?**
A: Filing the e-Postcard is free. To access the filing system, go to our e-Postcard page and then click on the link under how to file. Or go directly to the filing site at http://epostcard.form990.org. There is no paper form.

**Q: Do we need an e-mail address to file?**
A: Yes, you will need an e-mail address. The system uses the e-mail address to activate your login ID and password and to notify you if your e-Postcard was accepted or rejected by the IRS. If rejected, the e-mail will contain instructions on who to contact to resolve the problem.

**Q: What information do we need to file?**
A: The e-Postcard is easy to complete. All you need is the following information:
- Organization’s legal name (Disabled American Veterans Auxiliary)
- DBA – doing business as (Unit legal name and number)
- Organization’s mailing address
- Organization’s website address (if you have one).
- Organization’s employer identification number (EIN)
- Name and address of a principal officer of your organization
- Organization’s annual tax year –
- Answers to the following questions:
  - Are your gross receipts still normally $50,000 or less?
  - Has your organization terminated or gone out of business?

**Q: Will a confirmation be sent that the 990-N e-Postcard was done?**
A: Yes, you will receive an e-mail from the filing system indicating whether your e-Postcard was accepted or rejected by the IRS. If rejected, the e-mail will tell you who to contact to help resolve the problem. In addition, once you submit the e-Postcard to the IRS you can view the check filing status page where you can view and print an image of the e-Postcard for your records.
Q: An error message was received when trying to file, stating that the EIN is not correct. What do we do?
A: If you are certain that your EIN was entered correctly, the IRS may not have your organization listed as a tax-exempt organization. This may be because your application for tax exemption is pending or you did not apply for tax exemption. If this is the case, an officer of the organization should contact Customer Account Services at 1-877-829-5500 (a toll-free number) and ask that the organization be set up to allow filing of the e-Postcard. You can also contact national headquarters for further assistance.

Q: I am not longer with the organization; however I received notification from the IRS about filing. What should I do?
A: Call Customer Account Services toll-free at 877-829-5500 and explain the situation.

Q: What happens if our unit does not file?
A: An organization that fails to file the required e-Postcard (or annual return) for three consecutive tax years automatically loses its tax-exempt status. The revocation of an organization’s tax-exempt status does not take place until the filing due date of the third year. For example, if your e-Postcard was due on May 15, 2012 (for tax year 2011) and you did not timely file in 2009, 2010 or 2011, you lose your tax-exempt status effective on the 2013 due date.

Q: We are having technical problems. Who do we contact?
A: If you experience a problem with the e-Postcard filing system, such as a problem logging on to the system, send an e-mail describing the problem to epostcard@urban.org.
Preparing/Filing a 990-N e-Postcard

Visit the e-Postcard website: https://epostcard.form990.org/

If you are a new user:
1. Click register as a new user.
2. Click next.
3. Login ID Type: Exempt Organization
   Organization EIN: your unit acquired 9-digit number. (This must be the unit’s number and must not be associated with the parent chapter or state department)
4. Click next.
5. A screen will appear and the following information will be available for you to review:
   Login ID Type: Exempt Organization
   Login ID: Your 9-digit EIN plus 2 digits (NOTE: The last two digits at the end of your EIN are your personal credentials identifying you as a user).
   Organization Name: (a version of) Disabled American Veterans Auxiliary, Inc.
   Next, you'll prepare the following:
6. Password: Your own personal password. It must be between 6 and 15 characters and is case sensitive.
7. Verify password: Re-type the password that you choose for step 6.
8. First Name: Your first name
9. Last Name: Your last name
10. Email Address: The email address you would like to receive the IRS acceptance/rejection letter for the 990-N e-Postcard filing.
11. Verify Email Address: Type email address again.
12. Daytime phone number: A number the IRS can reach you at during business hours with questions.
13. Click next.
14. After the form has been submitted, open the email you have used in step 10.
15. Click on the link that has been included in the email. This will take you back to the e-Postcard site.
   You're officially verified with the IRS and ready to submit your e-Postcard.

Preparing a 990-N e-Postcard:
1. Visit the e-Postcard website at https://epostcard.form990.org/
2. Click step 2, “Create your Form 990-N (e-Postcard).”
3. Login ID: Your EIN plus the two digits assigned to you when you registered. For example, 12-345678901.
4. Password: The unique password you made when registering with the IRS. Remember this is case sensitive.
5. Click Login
6. Verify Filer Information: This page is to verify your unit or state department information. If a phone number or email address has changed, the user is able to update the information by clicking “No, I need to update my information before I proceed.”
   If everything is correct, click “Yes, my information is correct. Let me proceed.”
   If you’re new to filing, but the previous filer gave you his/her information, you must stop here and register for a new account. You can do so my clicking “No, I need my own login ID before I proceed.”
7. Now it’s time to fill out the form.
   a. For the tax year period beginning ______ and ending ______. This information will be filled out for you based on your fiscal year, per IRS records. You are not able to change this; it must be done through contacting the IRS.
b. Has your organization terminated or gone out of business? No

c. Are your gross receipts normally $50,000 or less? Yes

d. Line C Parts 1 & 2 and Line D should be automatically filled in with your unit or state department information based on IRS files. You are not able to change this; it must be done through contacting the IRS.

8. Click next page.

9. Organization Legal Name – again, will already be filled out for you.

10. If your organization conducts business using another name (dba) enter other name:
    a. DBA name – unit name or state department name
    b. DBA name – unit number, if applicable

11. In care of name – Person filling out card

12. Country – Country of residency

13. Number & Street – Address, including apartment or lot information

14. City or Town – Associated with above address

15. State – Associated with above address

16. Zip Code – Associated with above address

17. Organization website – Unit, State Department, or National Website. Can also be left blank.

18. Principal Officer – Typically unit or state department commander

19. Type of Name – will ask you if it is business or person – select person

20. Country - Country of residency

21. Number & Street – Address, including apartment or lot information

22. City or Town – Associated with above address

23. State – Associated with above address

24. Zip Code – Associated with above address

25. Click submit filing to IRS.

26. A pop-up will come onto your screen, asking if you want to save data, and submit this filing to the IRS – click OK.

27. You’ll now receive a page that says, “Congratulations, your form 990-N (e-Postcard) has been submitted to the IRS.”

28. Open your personal email account you have registered with the IRS.

29. Within thirty (30) minutes, you’ll receive an email from the IRS as a receipt of your filing. It will also tell you whether the e-Postcard was accepted or rejected by the IRS.

30. If accepted ➔ Congratulations, you’re done with this part!!!

31. If rejected ➔ Refer to the reasons listed and contact IRS for assistance.

The Final Step:
In accordance with the Constitution and Bylaws Article IV, Section 6 (state) or Article XI, Section 3 (unit) a copy of the approved filing confirmation must be sent to both your state and national headquarters.

Reminders:
- Always keep a copy of your filing with the unit copy of the financial report. It’s good to have a back-up in the event that your state department or national headquarters does not get a copy.
- Remember your login and password information. Store this in a safe place.
- All new users must have their own login and password.
- Failure to file for three consecutive years will result in a loss of your tax-exempt status. Don’t throw your status away; be sure to file yearly.
Applying for an Employer Identification Number (EIN)

There are two ways to apply for an EIN. Information on both ways are available at [http://www.irs.gov/uac/Form-SS-4.-Application-for-Employer-Identification-Number-(EIN)](http://www.irs.gov/uac/Form-SS-4.-Application-for-Employer-Identification-Number-(EIN)). The quickest and easiest way to apply for, and automatically receive, an EIN is using the online program. For those who don’t feel comfortable doing so online, Form SS-4 is also available online and includes information for mailing.

**The following steps are used to apply for an EIN online.**

1. Under “Other Items you may find useful” you’ll see the 2nd option is “Apply for an Employer Identification Number (EIN) online – click that option.”
2. This will take you to a new page – scroll all the way down and click “Apply online now.”
3. A pop-up will generate that informs you that this is U.S. Government Authorized Only – click ok.
4. Then click “begin application.”
5. The same pop-up box will generate as in #4, click ok again.
6. Click begin application
7. Click the last option – View additional types, including tax-exempt and government organizations, and click continue
8. Click community/volunteer group (it was the 5th item on the list) then click continue
9. It will ask you to confirm your selection – then click continue
10. From here, you’ll enter all of the information pertaining to the unit – it may request a social security number from you… if you aren’t comfortable giving it (it is just for information purposes only) you’ll have to find someone in your unit who is. Also, when it asks, you are the responsible and duly authorized officer or member.
11. As soon as it’s approved, email it to dava@dav.org and include the document from IRS. We will send the subordinate letter to the IRS, at which time it will take 4-6 weeks to process. At that time, you’ll be able to start step 2, which is attached in a word document, on how to set up a 990-N e-Postcard account and do the yearly filing. Once you get through it the first time, it is very simple.
Information on Reinstatement of Tax-Exempt Status After Revocation

The IRS has become more stringent with its regulations regarding the filing of the 990-N e-Postcard. This yearly postcard must be submitted online, and failure to file for three consecutive years will result in the revocation of the unit or state department tax-exempt status. **Units and State Departments may not function if their tax exempt status has been revoked.** Upon notification by the IRS of an automatic revocation, please contact DAV Auxiliary National Headquarters for further instruction and assistance in resolving the matter. Failure to comply with National Headquarters requests for reinstatement could result in the revocation of a unit or state department charter. Don't throw away your charter; file your 990-N e-Postcard yearly.

**Reinstatement of Tax-Exempt Status after Automatic Revocation**

If an organization has had its tax-exempt status automatically revoked and wishes to have that status reinstated, it must file an application for exemption and pay the appropriate user fee even if it was not required to apply for exempt status initially.

If the IRS determines that the organization meets the requirements for tax-exempt status, it will issue a new determination letter. The IRS will also include the reinstated organization in the next update of **Exempt Organizations Select Check** (Pub. 78 database), and indicate in the IRS Business Master File (BMF) extract that the organization is eligible to receive tax-deductible contributions. Donors and others may rely upon the new IRS determination letter as of its stated effective date and on the updated **Exempt Organizations Select Check** and BMF extract listings.

In most cases, the effective date of reinstated exemption will be the date that the organization’s exemption application was submitted to the IRS. However, organizations may choose to request that reinstatement be retroactive to the effective date of revocation. The IRS will grant retroactive reinstatement of exemption under certain limited circumstances. A new IRS [fact sheet](https://www.irs.gov) explains reinstatement options. Because the list is an official IRS record of organizations that lost their exempt status for failing to file for three consecutive years, an organization whose exempt status is reinstated remains on the list.

**Automatic Revocation - How to Have Your Tax-Exempt Status Retroactively Reinstated**

Organizations whose tax-exempt status was automatically revoked because they did not file required 990 series returns or notices for three consecutive years can apply for reinstatement of their tax-exempt status.

In a new [Revenue Procedure 2014-11](https://www.irs.gov), the IRS explains the four procedures an organization may use to apply for reinstatement.

**Streamlined Retroactive Reinstatement**

Organizations that were eligible to file 990-EZ or 990-N (ePostcard) for the three years that caused their revocation may have their tax-exempt status retroactively reinstated to the date of revocation if they:

- Have not previously had their tax-exempt status automatically revoked.
- Complete and submit **Form 1023 or Form 1024** with the appropriate user fee not later than 15 months after the later of the date of the organization’s Revocation Letter (CP-120A) or the date the organization appeared on the Revocation List on the IRS website.

These organizations should write on the top of the Form 1023 or Form 1024, “Revenue Procedure 2014-11, Streamlined Retroactive Reinstatement,” and mail the application and user fee to:

**Internal Revenue Service**

P.O. Box 12192

Covington, KY 41012-0192

Include a copy of the unit charter and Constitution and Bylaws!!!
Duties of Unit Officers

COMMANDER

• Shall preside at all regular or special meetings of the unit.
• Shall maintain order and such business as may legally be brought up during meetings.
• Shall countersign all checks and vouchers issued.
• Shall perform all other duties that may reasonably be assumed with the office as set forth in the Constitution and Bylaws of the National Auxiliary, the Standard State Bylaws, Standard Unit Bylaws and in the Official DAVA Ritual.
• The commander shall also carry out such other duties as may be lawfully determined by the unit.

It is the responsibility of the Commander:

1. To open the meeting at the appointed time.
2. To follow the proper sequence of business according to accepted practices of the unit in an orderly manner.
3. To properly recognize members who wish to speak.
4. To state and put to vote any motions that may come before the Unit as motions or that otherwise are brought forth during the meeting proceedings, and to announce the results of each vote. Shall also rule that a motion is out of order if it is not pertinent to the business of the meeting or is of a personal nature, etc.
5. To maintain order of the meeting at all times and expedite the business of the meeting without abridging the rights of the membership.
6. To declare the meeting adjourned when the Unit so votes or at the time prescribed in the program of the meeting.
7. To ensure the safeguarding of funds, properties and other assets against unauthorized loss or use.

At each meeting the Commander should have available:
1. A copy of the National Auxiliary Constitution and Bylaws.
2. A list or agenda of the complete order of business.
3. A list of all committees and chairmen.
4. A copy of the State Department Standing Rules.
5. A copy of the Unit Standing Rules, if any.

Practices of an effective Commander

Commanders are the unit's representative and program coordinator for the term that he/she is elected to. In addition to conducting meetings, a commander is responsible to:
• Maintain a working relationship with the parent chapter, state department, and community, when applicable.
• Appropriately represent the unit at DAVA functions and programs in the community as determined by the unit. The commander may delegate responsibilities to another officer or member in his/her inability to attend.
• Promote the greatest extent of member participation possible by presenting activity opportunities for consideration by the membership. Encourage committee chairmen and the general membership to share information of upcoming events or programs of interest to the membership.
• Appoint and empower members and committees to research and recommend, plan, or perform, activities and programs that are beneficial to the purpose of DAVA. The best ideas come from members who are involved in projects that interest them.
• Involve the senior vice commander in decision making and practices in preparation for him/her to perform the duties of the commander in the future.

SENIOR VICE COMMANDER
The senior vice commander shall perform the duties as set forth in the Official DAVA Ritual and shall encourage comradeship and promote harmony among the members. If given a chairmanship, such as membership, a report shall be given at each meeting. In the absence of the unit commander, the senior vice commander shall act in that capacity. Should the office of commander become vacant, the senior vice commander shall move up in position to fill the vacancy. If the senior vice commander refuses to accept the office of commander, the position of senior vice commander shall also be declared vacant, the junior vice commander shall fill the vacancy, and an election shall be held for senior and junior vice commanders.

JUNIOR VICE COMMANDER
Shall perform the duties of the station set forth in the Official DAVA Ritual. Shall see that every member is given a reasonable opportunity to state their views, in an orderly manner, on any subject under discussion in a meeting. Should a chairmanship be a duty of the office, such as Americanism, a report shall be given at each meeting and the involvement of the membership should be encouraged. Should a vacancy in the office of senior vice commander occur, the junior vice commander shall assume that position.

ADJUTANT
The adjutant is responsible for keeping the unit’s records and managing the official correspondence of the unit. The adjutant shall keep detailed records of action taken at the unit’s meetings. All motions considered by the unit shall be recorded along with the names of the members making such motions. The minutes shall indicate that the motion had a second and that discussion followed. The details of the discussion do not have to be recorded verbatim, only that discussion was allowed. It shall be recorded in the minutes whether the motion passed by majority or was rejected. Should the motion fail to have a second, it is so recorded by stating the motion did not have a second; therefore the motion failed. Any corrections made to the minutes of the prior meeting shall be recorded in the minutes of the meeting when they are corrected. Minutes of general and executive board meetings shall be given to the membership at the next general meeting. A motion and a second must be made by an executive board member to accept the minutes of an executive board meeting; no motion to accept the minutes of a general membership meeting is required.

The adjutant is responsible for sending written notice of meetings to all auxiliary members. Should it be a meeting to hold nominations and elections, the notice shall specify that this will be the subject of the meeting, when the meeting will be held, time the meeting will be held, and where the meeting will be held. Members must receive written notification no less than ten (10) days prior to the meeting. This is also true of any special meeting. A special meeting shall indicate what subject is to be discussed and no other business may be brought before the membership.

• The adjutant shall make the unit minutes and records available to members upon request.
• Shall furnish national headquarters with the names of convention delegates
• Shall submit the unit officer report form within ten days following installation.
• Submit the unit financial report within ten days following audit completion.
• Maintain an updated membership roster and notify state and national headquarters of any changes and deaths of members.
• Send a copy of confirmation of filing IRS Form 990-N e-Postcard or a copy of the appropriate Form 990 based on income to State and National Headquarters.

TREASURER

The treasurer shall be the custodian of the unit funds. All monies from any activity of the unit shall be turned over to the treasurer and shall be held by the treasurer. The treasurer shall distribute funds approved by the unit upon receipt of a signed voucher.

It shall be the responsibility of the treasurer to:
• Keep a system of accounting that indicates income and disbursements and reconcile the accounts each month.
• Preserve all receipts and vouchers for any payments made and shall render a report of the receipts and expenditures at each general meeting.
• Submit the appropriate annual 990 report to Internal Revenue Service.
• Submit all records and a copy of the appropriate 990 filing to the Audit committee in accordance with the national bylaws.
• Submit an annual financial report to the state and national organization.

CHAPLAIN

The chaplain is the spiritual leader of the unit and shall be responsible for leading prayers for the unit meetings. The chaplain shall keep the unit informed of members who may be in distress, and send remembrances to ill or deceased members or their family in accordance with the unit's standing rules. The chaplain may be called upon to represent the unit at funeral services for deceased members.

SERGEANT-AT-ARMS

Shall assist the commander in preserving order during unit meetings when called upon to do so. The sergeant-at-arms may be responsible for handling the physical arrangement of the meeting room.

MEMBERS’ DUTIES

1. To conduct yourself in an orderly manner.
2. To remain attentive when someone has the floor.
3. To eliminate conversations between yourself and other members while the meeting is being conducted.
4. To stand and be recognized by the chair should you wish to make a motion, ask a question or discuss some matter pertinent to the unit and its members.
5. To keep personal matters off of the floor and out of the meeting.
6. To become involved and be ready to take on added responsibilities in order to help the unit.
7. Do not always be ready to criticize the action or mistake of another member.
8. You elected the officers so you must respect their position. They in turn must realize that the unit is the governing body and each member is part of that unit. Majority of the unit body dictates and decides upon motions and procedures.
UNIT MINUTES

Name and Number of Unit ____________________________________________

Location __________________________________ Date __________ Time ______

CALL TO ORDER:

Prayer by __________________________________________________________ Chaplain

Pledge by __________________________________________________________ Patriotic Instructor

Purpose given by __________________________________________________ Sr. Vice Commander

Eligibility given by ________________________________________________ Jr. Vice Commander

Roll call of officers by ______________________________________________ Adjutant

  Commander: Present _________ Absent _________
  Sr. Vice Commander: Present _________ Absent _________
  Jr. Vice Commander: Present _________ Absent _________
  Treasurer: Present _________ Absent _________
  Chaplain: Present _________ Absent _________
  Adjutant: Present _________ Absent _________

Total officers & members present: _________________________________

Unit had a quorum: Yes _____ No _____ (Four (4) Senior members shall constitute a quorum. One member present shall be the Unit Commander or a Unit Vice Commander.)

ORDER OF BUSINESS:

Names of transfer members voted on: ________________________________________________________________

Names of visitors: ________________________________________________________________

Names of new members who were initiated: ________________________________________________________________

(New members and those who have not been previously initiated may be initiated at the meeting and their names recorded in minutes.)

READING OF THE MINUTES: Adopted _______ Adopted as amended _______

(The commander asks if there are corrections to minutes. Hearing none the minutes would be declared approved as read. If there are corrections, the minutes would be adopted as amended by unit vote.)

TREASURER’S REPORT: Beginning balance: __________ Income: __________

Disbursements: __________ Closing balance: __________

(After the report is given, the commander states that the treasurer’s report will be filed for audit. A motion does not have to be made for this. A motion to accept the report is out of order, since an audit must be taken before it can be established that the treasurer’s records are correct.)
BILLS AND COMMUNICATIONS:

________________________________

________________________________

Motion by: __________________________ Seconded: Yes______ No______
Carried: Yes______ No______

(If any action is taken on payment of bills or correspondence, the motion must be recorded correctly and the name of the person who made the motion must be indicated. It must show there was a second to motion, discussion followed, and the outcome of the vote of unit.) **This is true of any motion on any matter at a Unit Meeting.**

SICKNESS & DISTRESS: __________________________

________________________________

REPORT OF COMMITTEES:

Membership by __________________________
Americanism by __________________________
Hospital by __________________________
Community Service by __________________________
Legislation by __________________________
History by __________________________
Junior Activities by __________________________
Ways and Means by __________________________
Other committee reports: __________________________

UNFINISHED BUSINESS: __________________________

________________________________

NEW BUSINESS: __________________________

________________________________

MONEY MARCH: Amount collected __________

REMARKS FOR THE GOOD OF THE ORGANIZATION: __________________________

________________________________

CLOSING CEREMONY:

Minutes Approved: Date__________
Adjutant's Signature: __________________________
Commander's Signature: __________________________
TREASURER'S REPORT

Treasurer's Report by: ____________________________________________________________

Date: _______________ Unit Name and Number ________________________________

Beginning Balance: Month ____ Day ____ Year________
(Checking Account)............................................................................................ $_______

Receipts:

Membership dues from:
Names: ____________________________________________
____________________________________________________ $_______

Fund Raisers........................................................................................................ $_______
Donations............................................................................................................ $_______
Other: (explain) __________________________________________________________ $_______

Total Receipts $___________

Disbursements:

Dues to National Headquarters ................................................................. $_______
Postage........................................................................................................... $_______
Expense for fund raiser............................................................................. $_______
Other: (explain) _______________________________________________________ $_______

Total Disbursements $___________

[NOTE: Beginning balance (+) Total receipts (-) Total disbursements (=) ]

Closing Balance $___________

ADD:

Checking: ........................................................................................................ $_______
Savings ......................................................................................................... $_______
Certificates, etc. ....................................................................................... $_______
Other accounts: (Explain) ______________________________________________ $_______

Total Unit Assets ....................................................................................... $_______

Treasurer's Signature: __________________________________________________

(This is a suggested form that can be used by the unit treasurer.)
TREASURER'S REPORT SUMMARY

Unit Name & Number

Date of Meeting Reporting period from to

BEGINNING BALANCE (from last report) $ 
(+) Total receipts (income) $ 
(-) Less total disbursements $ 

CLOSING BALANCE: $ 

ADD:
Checking: $ 
Savings: $ 
Certificates: $ 

Total of all assets: $ 

Treasurer's signature: 

(This can be filled out by the treasurer from the treasurer’s report and given to the adjutant to be attached to the minutes.)
UNIT ELECTIONS

1. All life members must be notified in writing that the annual election will be held giving time, place, and date. Written notification includes: letter, newsletter, postcard, or email. Said notification can be sent weeks or months in advance, but must be received by the member not less than ten days prior to the nomination/election.

2. New life members may be initiated at a meeting held for elections; however, initiation is not required.

3. Any auxiliary life member in good standing can be nominated for a unit office. Verify the member elected belongs to the unit and their membership is in good standing.

4. Any life member in good standing may vote at an election. This includes the Commander. Remember, the Commander can always vote. The Commander can vote to break a tie, to create a tie, or can abstain from voting.

5. The Commander conducts the election. In his/her absence, the duty falls to the Senior Vice Commander. What happens should the Commander, Senior Vice Commander and Junior Vice Commander all be absent? There is no meeting. The bylaws state that a quorum (4 members) must be present and one must be the Commander, or in their absence the Senior Vice or Junior Vice Commander, in order to conduct the meeting.

6. The Commander begins by stating that nominations are open for the office of Commander. Then asks if there are any other nominations. The Commander then pauses and, if there are no other nominations, declares nominations closed for the office of Commander and then calls for the vote for those in favor and those opposed. Majority determines the outcome. Then the election shall proceed for the office of Senior Vice Commander and so on.

7. If more than one member is nominated for the same office then ballots must be passed out to the members eligible to vote. The balloting will continue until a member obtains a majority (more than half) of the votes or one of the nominees chooses to withdraw leaving only one candidate.

8. If the same officers are elected that have been serving, they must be properly installed each year by an officer that is eligible to perform the ceremony of installation as dictated in the Standard Local Unit Bylaws, Page U-3.
# AUXILIARY OFFICER REPORT

All Spaces Must be Completed

## Date:

### Employer ID # (EIN)

## Unit Name & Number:

## City:

### State:

### Zip:

## Date of Annual Election:

### Date of Installation:

## Address of Regular Meetings:

## Time & Day of Regular Meetings:

<table>
<thead>
<tr>
<th>Time</th>
<th>Day of Week</th>
<th>Week of Month</th>
</tr>
</thead>
</table>

## OFFICERS ELECTED FOR YEAR BEGINNING:

### COMMANDER

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

### LEGISLATIVE CHAIRMAN

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

## SR. VICE COMMANDER

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

### MEMBERSHIP CHAIRMAN

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

## 1ST JR. VICE COMMANDER

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

### ELECTED STATE EXECUTIVE COMMITTEE MEMBER

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

### ALTERNATE STATE EXECUTIVE COMMITTEE MEMBER:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Street Address:</th>
<th>City/State/Zip:</th>
<th>Membership #:</th>
<th>Telephone:</th>
<th>Email:</th>
</tr>
</thead>
</table>

The Unit Adjutant shall receive all mail from National Headquarters and it will be the Adjutant's duty distribute it to the proper officers and made available at all meetings.

This form must be completed and returned to DAV Auxiliary Headquarters within ten (10) days after installation in compliance with the national constitution and bylaws of the Disabled American Veterans Auxiliary.

Send copies to DAVA State Department and DAV State Department. Retain a copy for unit files.
GUIDELINES TO COMPLETE AN AUDIT

- It is the duty of the unit/state commander to appoint an audit committee.

- Three members must serve on the audit committee. However, the commander, senior vice commander, junior vice commander (when signing warrants, vouchers, check requests), treasurer, adjutant, and members of the finance committee (on the state level) cannot be a part of the committee.

- The adjutant must present records and could take minutes.

- The treasurer should be present to answer any questions the committee may have.

All committee members and officers stated above must be present at the time of audit.

Records for the Audit:

- Minutes. (*Minutes are imperative. Minutes show if all disbursements were legal.*)
- Check Request or Vouchers. (*Check requests or vouchers must match amount and check number in checkbook and the bank statement.*)
- Treasurer’s Ledger.
- Checkbook. (*You must indicate after taking off the outstanding checks [those that have not cleared the account] that the account is in agreement with the bank statement.*)
- Distribution Reports which indicate Per Capita Deposits
- A copy of the acknowledgement of filing Form 990-N e-Postcard or IRS Form 990, as warranted by amount of income as specified in the National Constitution and Bylaws.

How to give an Audit Report:

An Audit report should tell when the committee met; who was present; the purpose of the meeting; what was reviewed (example: vouchers, minutes, bank statements, etc.) Then the final statement of the committee chairman should be: “In reviewing all records we find that the books are in order.” Then a motion to accept the audit report should be made.

Note: During unit meetings, members do not make a motion to accept the treasurer’s report. The motion should be to hold or file treasurer’s report for audit.
<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BEGINNING BALANCE</strong> (Line 25 of Previous Year’s Report)</td>
<td></td>
</tr>
<tr>
<td><strong>INCOME:</strong></td>
<td></td>
</tr>
<tr>
<td>1. DUES (Per Capita from National Headquarters)</td>
<td></td>
</tr>
<tr>
<td>1A. DUES RECEIVED FROM JUNIOR MEMBERS (Minus National &amp; State Per Capita)</td>
<td></td>
</tr>
<tr>
<td>2. FORGET-ME-NOT DRIVES</td>
<td></td>
</tr>
<tr>
<td>3. BINGO (GROSS RECEIPTS) (Income from Bingo ONLY)</td>
<td></td>
</tr>
<tr>
<td>4. THRIFT STORE INCOME (Explain on Attached Schedule)</td>
<td></td>
</tr>
<tr>
<td>5. KITCHEN OPERATIONS (Gross Receipts)</td>
<td></td>
</tr>
<tr>
<td>6. INTEREST INCOME</td>
<td></td>
</tr>
<tr>
<td>7. OTHER INCOME (Attach Schedule) (Example: Donations, refunds, money received from Chapter)</td>
<td></td>
</tr>
<tr>
<td>8. TOTAL INCOME (Lines 1 through 7)</td>
<td></td>
</tr>
</tbody>
</table>

*If the totals of Lines 2 through 7 exceed $100,000, the report must be audited by a Certified Public Accountant.*

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DISBURSEMENTS:</strong></td>
<td></td>
</tr>
<tr>
<td>9. SALARIES/ALLOWANCES (Attach list showing Names and Amounts)</td>
<td></td>
</tr>
<tr>
<td>10. CONVENTION/CONFERENCE/SEMINARS (Attach list showing Names and Amounts)</td>
<td></td>
</tr>
<tr>
<td>11. POSTAGE AND OFFICE SUPPLIES</td>
<td></td>
</tr>
<tr>
<td>12. VAVS PROGRAM (List Medical Center and Amount)</td>
<td></td>
</tr>
<tr>
<td>13. DONATIONS TO NATIONAL AUXILIARY SERVICE PROGRAM</td>
<td></td>
</tr>
<tr>
<td>13A. DONATIONS TO SERVICE, RELIEF &amp; COMMUNITY SERVICE</td>
<td></td>
</tr>
<tr>
<td>14. FORGET-ME-NOT EXPENSES</td>
<td></td>
</tr>
<tr>
<td>15. BINGO EXPENSES (Attach Schedule) (Example: Payouts, workers, etc.)</td>
<td></td>
</tr>
<tr>
<td>16. THRIFT STORE EXPENSES (Attach Schedule)</td>
<td></td>
</tr>
<tr>
<td>17. KITCHEN OPERATION EXPENSES AND/OR OTHER UNIT EXPENSES (Example: Bylaws, Jewelry, Gifts, etc.)</td>
<td></td>
</tr>
<tr>
<td>17A. STATE MANDATE</td>
<td></td>
</tr>
</tbody>
</table>
18. OTHER (Attach Schedule)

19. TOTAL DISBURSEMENTS (Lines 9 through 18)

BALANCE (Beginning balance, plus Line 8, Minus Line 19)

ASSETS: (As of the end of the Accounting Period)

20. CHECKING ACCOUNTS

21. SAVINGS ACCOUNTS

22. CD’S (FACE VALUE AT MATURITY)

23. REAL ESTATE (PURCHASE VALUE) (MARKET VALUE)

24. OTHER (Attach Schedule)

25. TOTAL ASSETS (Lines 20 through 24)
(Should equal the amount shown on Balance Line after Line 19)

NAME OF BANK AND LOCATION: ___________________________________________________________________

EMPLOYER IDENTIFICATION NUMBER (EIN) #: ___________________________________________________________________

NAMES OF ALL AUTHORIZED SIGNATURES: ___________________________________________________________________

SIGNED BY AUDIT COMMITTEE (THREE MEMBERS)
(Must not include Comdr., Sr. Vice Comdr., Treasurer, Adjutant, or Finance Committee)

Submitter:

Member

Member

Member

Date

This form must be completed and returned to DAV Auxiliary National Headquarters within ten days following completion of the audit in accordance with the National Constitution and Bylaws of the Disabled American Veterans Auxiliary.

Print Four (4) Copies. Distribute as follows:
DAVA National Headquarters, DAVA State Headquarters, DAV State Headquarters, and Unit Copy
DAV AUXILIARY SUPPLEMENT TO STATE BYLAWS
2016 - 2017

STATE DEPARTMENT OF: _______________________

This form must be completed in its entirety

It is understood that the information included on this form must be as stated in the State Standing Rules adopted at the State Convention by a majority vote of the duly elected and registered delegates.

1. Dates of State Convention ____________ Place of State Convention _____________

2. Were amendments or a revision to the State Standing Rules adopted at the State Convention? Amendment(s) ______ or Revision ______ or None ______

3. Dates of the State Department fiscal year ________________

4. State per capita: Junior members $________

5. State Mandates: Yes / No _______. Amount(s) $_______________ Explain ______

6. Tenure of office for State Commander: (A) One year only ______. (B) More than one consecutive year____ Number of years____. (C) More than one year, but not consecutively ______.

7. Number of Junior Vice Commanders: ______

8. Titles of appointed officers (other than Adjutant, Chaplain, Sergeant at Arms, Flag and Color Bearers):

9. Provision has been made for an active resident Past National Commander to vote on the State Executive Committee? Yes _____ No _____ (This must be in your State Standing Rules.)

10. Number of elected finance committee members: _____. Term of their positions: ______________

11. Titles of chairmen/committees (other than Americanism, Community Service, Jr. Activities, History, Hospital, Legislation, Mae Holmes, Membership, Finance, Audit, Standing Rules, Nominating, Credentials, VAVS, Ways & Means or Fund Raising Chm.):

12. Number of members elected to the committee on nominations: _____
Nominating committee elected at: _______________________

13. Number of members on Standing Rules Committee: _____. Elected or Appointed? _____________
Term of their positions: _______________________

14. Number of divisions within state department (if applicable) _____ Name of division: ______________
Do you have Division Guidelines or Rules within, or attached to, your Standing Rules? ______

15. Does your state department participate in the annual report program for judging at state convention? Yes_____ No______ Comments ______________

Within ten (10) days following the adjournment of the state convention, the Convention Adjutant shall submit to DAVA National Headquarters three (3) copies of the new completed Supplement to State Bylaws and three (3) copies of any adopted amendments or revision to the State Standing Rules. All must be reviewed/approved by the National Judge Advocate prior to their becoming effective and distributed.

Convention Adjutant’s Signature __________________________ Date of Adoption (of New Supplement) ________________

DAV AUXILIARY NATIONAL HEADQUARTERS
3725 ALEXANDRIA PIKE
COLD SPRING, KY 41076

Rev 1015
PROCEDURE TO BE FOLLOWED AT THE 2016 STATE CONVENTION

1. A copy of the completed Supplement to State Bylaws from the previous state convention shall be distributed to the convention delegates prior to the first business session. Any amendments to the State Standing Rules proposed by the Standing Rule Committee shall be distributed to the convention delegates prior to vote during the first business session. A copy of the proposed budget must be submitted to the delegates prior to the vote.

2. The State Standing Rules may be amended by a majority vote of those registered and voting during a first business session of the convention.

3. Three (3) copies of any amendments to the State Standing Rules as distributed to the delegates and adopted at the state convention shall be submitted within ten (10) days after adjournment of the state convention along with three (3) copies of the Supplement to State Bylaws.

4. Any adopted amendments to the State Standing Rules which would affect the Supplement to State Bylaws shall be included on the Supplement prior to submitting to national headquarters.

The supplement and any adopted amendments shall be reviewed for any discrepancies by the National Judge Advocate prior to their becoming effective.

5. The State Adjutant in office at the time of the state convention shall be responsible for submitting the following to national headquarters within ten (10) days after adjournment of the state convention:

- Completed State Financial Report or Accountant’s Statement (If accountant has not completed a financial statement please see that a letter is submitted by the accountant indicating that he or she does have the records.)
- A copy of the acknowledgement of filing Form 990-N e-Postcard or a copy of IRS Form 990, as warranted by amount of income. (Refer to National State Bylaws Article IV, Section 6.)
- Completed State Officers Report Form. (Listing all information requested and signed.)
- Three copies of the adopted Supplement to State Bylaws. (Three copies must be submitted even if there were no changes to the State Standing Rules.)
- Three copies of the amendments to the State Standing Rules that were submitted to the delegates and voted on. Note: must be submitted for review prior to including them in the State Standing Rules.

6. The State Adjutant shall be responsible for sending to National Headquarters, within five (5) days after the close of state convention, the winning program reports, by category, judged at state convention.

NOTE: Failure to comply with all of the above will bar the state delegate or alternate from voting at the national convention.
A budget is based on what you expect or anticipate receiving and what you expect to spend during the year. A deficit budget can never be adopted and you must show income and expenses.

A budget does not begin with a starting balance. There is no starting balance since you are setting it up for a new year. It should show where income is expected to originate and clarify the expenditures. Budgets may not show expenses only; this is not correct or even to be accepted by the membership. Even though you may know you have the money, the membership cannot assume this fact.

**SAMPLE BUDGET**

**ESTIMATED INCOME:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jr. per capita</td>
<td>50.00</td>
</tr>
<tr>
<td>State fund raisers</td>
<td>1,600.00</td>
</tr>
<tr>
<td>National label program</td>
<td>2,000.00</td>
</tr>
<tr>
<td>Interest</td>
<td>750.00</td>
</tr>
<tr>
<td>Miscellaneous income</td>
<td>300.00</td>
</tr>
<tr>
<td><strong>TOTAL ANTICIPATED INCOME</strong></td>
<td>4,700.00</td>
</tr>
<tr>
<td>Transfer from savings (as needed)</td>
<td>2,000.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>6,700.00</td>
</tr>
</tbody>
</table>

**ESTIMATED EXPENSES:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Commander 12 mo. @ 50.00</td>
<td>600.00</td>
</tr>
<tr>
<td>State Adjutant 12 mo. @ 30.00</td>
<td>375.00</td>
</tr>
<tr>
<td>Adjutant supplies</td>
<td>1,000.00</td>
</tr>
<tr>
<td>Treasurer 12 mo. @ 25.00</td>
<td>300.00</td>
</tr>
<tr>
<td>Vice Comm. &amp; JA 4 @ 50.00</td>
<td>200.00</td>
</tr>
<tr>
<td>Chaplain 1 @ 25.00</td>
<td>25.00</td>
</tr>
<tr>
<td>Supplies for Treasurer</td>
<td>50.00</td>
</tr>
<tr>
<td>Supplies for Chaplain</td>
<td>50.00</td>
</tr>
<tr>
<td>VAVS Representatives 4 @ 25.00</td>
<td>100.00</td>
</tr>
<tr>
<td>VA Hospitals 4 @ 200.00</td>
<td>800.00</td>
</tr>
<tr>
<td>St. and Natl. Convention – Comdr.</td>
<td>1,200.00</td>
</tr>
<tr>
<td>St. and Natl. Convention – Adj./Sr. Vce</td>
<td>1,000.00</td>
</tr>
<tr>
<td>Miscellaneous/Contingency Fund</td>
<td>1,000.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>6,700.00</td>
</tr>
</tbody>
</table>
State Officer Duties

The following is a guideline to assist state officers in the performance of their duties. State officers should refer to their respective state standing rules for responsibilities designated to specific offices.

State Commander

The executive power of the state department shall be vested in the state commander. The state commander shall be the presiding officer of the Auxiliary state convention, state executive committee meetings, and other state meetings.

The state commander shall appoint the state chairman of the following committees: Americanism, Community Service, History, Hospital, Junior Activities, Legislation, Mae Holmes, Membership, and VAVS, and may also appoint such other chairmen as deemed necessary or determined by the state standing rules. All appointments of the state commander must be approved by the state executive committee and provided for in the state standing rules.

The state commander shall sign state department checks and warrants/vouchers/check requests.

In the odd-numbered years, the state commander shall recommend a VAVS representative for state-affiliated VAMC’s.

The state commander shall assure that a delegate to the national convention is elected at the state convention.

The state commander will be a resource to all units to provide guidance and information and may assist units needing assistance filing the appropriate IRS Form 990.

State Senior Vice Commander

The state senior vice commander shall assume such duties as assigned by the state commander and shall serve in the absence of the state commander. In the absence of the state treasurer or state commander, the state senior vice commander shall sign or cosign state department checks and in the absence of the state commander, shall cosign warrants/vouchers/check requests.

The state senior vice commander may represent the state commander when asked to do so by the state commander. As a state officer, may assist units needing assistance filing the appropriate IRS Form 990.

State Junior Vice Commander(s)

State junior vice commander(s) shall be responsible for Auxiliary programs as designated in the state standing rules.
The state junior vice commander shall serve in the absence of the commander and senior vice commander, but are not approved to sign checks or vouchers.

The state junior vice commander may represent the state commander when asked to do so by the state commander. As a state officer, may assist units needing assistance filing the appropriate IRS Form 990.

**State Treasurer**

The state treasurer shall keep a complete financial record of all monies received, expended and remitted. All monies must be deposited in the name of the state department.

The state treasurer shall be responsible for ensuring that all financial accounts for the organization have three (3) authorized signatures on file with their financial institution(s). Said signatures shall be the state commander, state senior vice commander and state treasurer.

The state treasurer shall sign state checks and pay out money only on properly prepared warrants/vouchers/check requests as provided in the state budget, by the state finance committee, or by vote of the state convention or state executive committee. All state department checks shall be completed and signed by the state treasurer and cosigned by the state commander. In the absence of the state treasurer or state commander, the state senior vice commander shall sign or cosign the checks.

All funds received in the name of the DAV Auxiliary must be deposited within thirty (30) calendar days of receipt.

The state treasurer shall give an itemized report of receipts and expenditures at each state executive committee meeting and shall submit all records to a state audit committee or to an independent or certified public accountant. The state treasurer shall ensure the appropriate IRS Form 990 is properly filed.

As a state officer, may assist units needing assistance filing the appropriate IRS Form 990.

**State Judge Advocate**

The state judge advocate shall be the legal advisor to the state commander and shall, upon request of the state commander, render an opinion on all questions arising in the state department and on intraunit disputes.

The state judge advocate shall render an opinion on questions of parliamentary procedure at all sessions of the state convention, state executive committee meetings and other state meetings. The national constitution and bylaws are the primary source of parliamentary guidelines and, when needed, Robert’s Rules of Order shall be referenced.

All opinions of the state judge advocate shall be advisory only.
**State Adjutant**

The state adjutant shall be the secretary of the state department and shall be responsible for all administrative affairs and shall attend and keep a record of all proceedings of the state convention, state executive committee meetings and other state meetings, but shall have no vote.

The state adjutant shall also assume such other duties as may be assigned by the state commander.

The state adjutant shall disseminate all information received in the name of the state department to all appropriate officers, chairmen, and units.

The state department shall use warrants/vouchers/check requests which shall be initiated by and signed by the state adjutant or chairman of the state finance committee and cosigned by the state commander. In the absence of the state commander, the state senior vice commander shall cosign warrants/vouchers/check requests.

The state adjutant is responsible for the distribution of the annual national report forms.

The state adjutant shall prepare any proposed changes in the state standing rules and convention rules if there is no committee assigned to this task.

The state adjutant in office at the time of the state convention shall be responsible for submitting to national headquarters within ten (10) days after adjournment of the state convention the following:

- a. State Financial Report form or Accountant's statement
- b. A copy of the acknowledgement of filing the appropriate IRS Form 990.
- d. State Officers Report form (Any changes during the membership year also requires notifying national headquarters).
- e. Supplement to State Bylaws (3 copies).
- f. Adopted amendments to the State Standing Rules (3 copies).

Failure to comply with the above will bar the state delegate or state alternate from voting at the following national convention.

The State Adjutant shall also be responsible for sending to National Headquarters within five (5) days after the close of state convention, the winning program reports, by category, judged at state convention.

A copy of the completed Mae Holmes report from each unit must be sent to the National Mae Holmes Chairman and the district's national executive committee member.

As a state officer, may assist units needing assistance filing the appropriate IRS Form 990.
**State Chaplain**

The state chaplain shall serve as spiritual leader in a non-sectarian role as described in the official ritual of the organization and shall recite or lead invocations and benedictions where such prayers are offered.

**State Sergeant at Arms**

The state sergeant at arms shall tend strictly to the preservation of order on the floor of the state convention, state executive committee meetings, and other State meetings and shall also perform such other duties as may be required.
State Executive Committee Meeting

Order of business
1. Call to order by State Commander (or highest ranking officer) (and state the purpose of the meeting, which is to conduct business of the organization)
2. Opening prayer – State Chaplain
3. Pledge of Allegiance – Patriotic Instructor or Americanism Chairman
4. (if needed) Installation of State Executive Committee Members and/or Alternates
5. Roll Call of the State Executive Committee
   a. Officers with a vote, including the Immediate Past State Commander
   b. Active, resident Past National Commander (if provision has been stated in your State Standing Rules)
   c. Executive Committee member from each unit (if absent, call for the alternate member)
   d. Officers with no vote (Adjutant, Assistant Adjutant, Judge Advocate, Chaplain unless they are the elected SEC from their unit)

(In order to continue, a quorum must be present. See the Constitution and Bylaws where it states: “One/third (1/3) of all eligible voting members of the state executive committee shall constitute a quorum.” To be considered an ‘eligible voting member’ you have to have been installed by a proper installing officer, at the time and place provided in the State Standing Rules.)

6. Minutes of previous SEC meeting (if the minutes were mailed and no corrections are brought to the floor, the Commander may state that the minutes stand approved as printed. If they have not been printed and mailed, they must be read and a motion to accept is in order.)
7. State Treasurer’s report of income and disbursements, and balances of accounts
8. Communications and any needed action
9. Unfinished (old) business
10. New business
11. Announcements
12. Closing prayer
13. Adjournment

Over
Items for consideration under new business

Pre-Convention SEC Meeting:
- Election of convention nominating committee – unless this election is held at the 1st business session of the convention. (Refer to the State Standing Rules where it must be stated.)
- If your state judges annual reports, appoint or ask for volunteers to serve on judging committees.

Post-Convention SEC Meeting:
- Roll Call and installation of SEC’s and Alternate SEC’s for the new year. Written verification of the SEC’s and Alternates who were elected at a Unit meeting (i.e. a copy of the official Officer Report Form) must have been received by the State Adjutant, either by mail or handed a signed copy.
- Appointments of State Commander:
  - Appointed officers;
  - Chairmen
  - Committees
- The Commander will entertain a motion for approval. (SEC approval is required for all appointments)
- Election of State Finance Committee member(s) unless this election is held during the final business session of the convention (Refer to SSR’s where it must be stated.)

Meeting Protocol
- Guests are always introduced and welcomed. State their name and title, and other pertinent information, in your introduction. Guests are usually NOT contributors to the business of the State Executive Committee during the meeting.

Highly Recommended
- Prior to the opening of the meeting, arrange for the seating of the SEC’s in an area separate from others who may be attending the meeting, including Alternate SEC’s who will not be voting. This will ensure that any motions or voting will come from those who have a voice and a vote.
- There could also be designated seating of the officers with a vote and those without a vote.
WRITING AND SENDING A RESOLUTION

A resolution has been described by the Random House College Dictionary as ‘a formal expression of opinion or intention made, usually after voting, by a formal body.’

The correct format is essential for your resolution to be considered in committee, such as the Auxiliary’s Interim Bylaw Committee. If the form is not correct, or the idea is not presented correctly, it may be returned to you for corrections. The chairman of the committee could include some suggestions when returning it. If any suggested changes are not clear to you, you should contact auxiliary national headquarters with your questions.

The procedure for submitting a resolution for consideration is included in the bylaw book in the Official Convention Rules on pages N 7-13.

A resolution has four parts:
- Heading
- Subject
- Preamble
- Operate Clauses

1. **Heading**
   The heading is the identification for the resolution and informs the committee of three things:
   - WHERE the resolution is being submitted,
   - WHAT the topic of the resolution is, and
   - WHO is submitting it.

   Example heading:
   **SUBMITTED TO:** The Interim Bylaw Committee
   **SUBJECT:** Duties of State Adjutants
   **PROPOSED BY:** Alaska Unit #99

2. **Subject**
   The subject tells you WHO will be taking the final action. The path your resolution will take is this: Your resolution is submitted to the Interim Bylaw Committee, and from there to the Convention Constitution and Bylaw Committee, and from there to the delegates at a national convention. All resolutions **do not** make it out of committee. Convention Rule 9 tells you your options in the event this occurs.

   Example subject:
   **The delegates at the National Convention** with the location and date.

Document Author – Carol Gray, PNC, Past National Judge Advocate
3. **Preamble**
   The preamble explains in its wording WHY the action should be taken. It will also state your reasons for the action and also any concerns that you have. The first word will set the tone for your resolution and how strongly you feel about the change.

   Each clause in your preamble is followed by a comma which is then followed by the word “and.”

4. **Operative Clauses** (also known as “activating clauses”)
   These clauses tell what ACTION the committee should take to solve the problem that you addressed in the preamble. This should also be the strongest part of your resolution and will likely be the most debatable. These clauses will also end with a semi-colon (;). The final clause should be followed by a period.

   Your resolution is actually one very long sentence of taking a stand or action. The best way to organize your resolution is to start with an outline which will list what you want to convey to the committee. Once you have decided how you want the problem fixed, use the smallest number of ideas to explain them. By deciding the ending first, you will find it easier to make a simple and clear resolution.

   When you are ready to write your resolution, the following punctuation and layout rules should be followed.

   “WHEREAS” will be indented and in capital letters, as will the clauses of resolve – BE IT RESOLVED and BE IT FURTHER RESOLVED.

   The word “WHEREAS” is followed by a comma but “BE IT RESOLVED” OR “BE IT FURTHER RESOLVED” are not.

   Now that your resolution is written and before sending it, recheck your document to make sure it has the:

   * Heading
   * Subject
   * Preamble, and
   * Operative Clauses.

   You will also need to make certain your resolution **accomplishes** something and that your unit or state department is prepared for any debate or for any questions other delegates may have.

   The final step you **must** take prior to mailing the resolution (in triplicate) is to sign and date your documents.
PAST NATIONAL COMMANDERS’ AWARD
DAVA OUTSTANDING MEMBER OF THE YEAR

(Please type or print. All information must be neat and legible.)

Name of Nominee: ____________________________ Member Code #: __________
Address of Nominee: __________________________ Phone: (____) ________
City: __________________________ State: __________ Zip Code: __________
Unit Name & Number: __________________________ Years of continuous membership: ______
Eligible through: __________________________

PURPOSE: To recognize the contributions and dedication of an outstanding member of the Auxiliary whose efforts have enhanced the goals of the Auxiliary, the Parent Organization, and has been active in the community since becoming an auxiliary member.

ELIGIBILITY: Any active senior member of the Disabled American Veterans Auxiliary is eligible for this award with the exception of a previous winner of the Past National Commanders’ Award, any Past National Commander, or an employee of the DAV and/or Auxiliary. Any DAV Auxiliary member in good standing may sponsor an individual for this award.

Please read the instructions thoroughly. ONLY the current official form received from National Headquarters or the current form on the Auxiliary website will be accepted. Use of previous forms will NOT be considered for the award. During the years of auxiliary membership, list and explain in the appropriate categories, the activities and approximate period of time in which the candidate was involved or helped initiate those achievements and involvement with other community groups. Do not include involvement in other veterans’ organizations.

In order to qualify for this award a photograph of the nominee must be attached.

Sponsor Information:
Name: __________________________ Phone: __________________________
Address:

Street

City, State, Zip Code

Unit Name and Number: __________________________
Membership Code: __________________________

As sponsor I hereby verify that the information submitted is correct.

______________________________ __________________________
Sponsor’s Signature Date

This completed form must be submitted to National Headquarters and postmarked no later than March 31, 2016.
COMPLETE THIS FORM IN ITS ENTIRETY.

1. Is the Nominee employed? Yes ____ No ____. If no, describe any previous experience.

2. Does the Nominee now hold an office, chairmanship, or other position on the unit, state, or national level of the Auxiliary? Yes _____ No _____. If yes, please specify.

3. List all outstanding personal achievements and any awards received since becoming an auxiliary member.

4. List and explain any new or special projects that were initiated by this nominee.
5. Explain in detail any participation in the following programs of the DAV Auxiliary.

Americanism

Community Service

Hospital

Junior Activities

Legislation

Membership

VAVS

6. Explain any participation in the programs of the DAV parent organization.
7. List participation and explain involvement with other community groups. (DO NOT INCLUDE PARTICIPATION IN OTHER VETERANS’ ORGANIZATIONS.)

Note to Sponsor: Please use the space below to state in your own words why you feel this member is truly outstanding and deserves consideration for this award. Additional information may be attached.

Sponsor’s Signature
(Not a Unit or State)  Date

Return completed form to: National Auxiliary Headquarters
3725 Alexandria Pike
Cold Spring, KY 41076
NATIONAL EXECUTIVE COMMITTEE MEMBER
DUTIES AND RESPONSIBILITIES

A National Executive Committee Member is not a national officer since the member is elected by their district only, but they play an important role in the organization since the National Executive Committee Member is a liaison between the district they represent and the national organization. Their duty is to attend all national executive committee meetings and make decisions on behalf of the district when required to do so. It is also their responsibility to report back to the district with pertinent information. Below are some of the duties of the National Executive Committee Member:

* Shall attend the National Fall Conference and National Convention and act as a national page at the National Convention and participate in the Memorial Service. Transportation and expense money authorized by the national finance committee will be provided. Receipts must be submitted to offset all expense money and airfare. Should the NEC be driving they must show round-trip mileage and coach airfare since they will not be compensated for more than the airfare.

* Should an NEC not be able to attend a national conference or national convention, they are to notify national headquarters and their alternate immediately. The alternate will then receive the expense money. Should an NEC not be present for the entire conference and/or convention, including the Introduction of National Officers at the conclusion of the national convention, national headquarters has the right to request the expense money given to them be refunded to national headquarters to be given to the alternate if they are in attendance. NEC’s or Alternates leaving the national convention prior to its conclusion must notify the National Adjutant.

* When authorized by national headquarters to attend a state, district, or any other function as the representative, they will receive and must submit a completed travel expense statement as soon as possible after the event. This travel expense statement should only show actual expenses incurred such as round-trip coach air fare or round-trip mileage which cannot exceed air fare, room, meals, tips, parking, etc. Receipts must be presented for all justified expenses. No items of a personal nature such as clothing, dry cleaning, hair, or the expenses of a traveling spouse or companion are to be included. Alcoholic beverages are not considered a legitimate expense. No reimbursement will be given for raffle tickets or personalized gifts. If authorized by national headquarters to be the national representative at a state convention, a gift will be supplied by national headquarters.

* If a district meeting is held, it will be the responsibility of the NEC to conduct the meeting. An NEC may submit expenses for one night’s lodging at a district meeting; one meeting per year.
* Shall keep the Alternate informed of matters within the district since it is the duty of the Alternate to attend all meetings in the absence of the NEC.

* Shall help establish new auxiliaries within their district should the Auxiliary State Commander request assistance.

* May submit bulletins for mailing to units within the district. The bulletins should inform members of the dates of conferences, new and different activities being conducted on the various programs of the organization, etc. Bulletins must be received at national headquarters by mail, email, or fax no later than the 10th of each month.

* Prior to the national convention, the NEC must compile an annual report and submit to national headquarters in order that it may be printed and sent out to the units within their respective district. The report should consist of information and statistics submitted by the units on their annual reports and any helpful procedures that can be of benefit in communicating from units to states to national headquarters. The report should be one page in length and submitted by the deadline indicated. National headquarters will print the report and send it to all units within the district.

* When attending their own state convention they are a delegate, PSC, etc., and not a national executive committee member and, therefore, should not expect more privileges than any other member or serve on committees as NEC. If authorized by national headquarters to be the national representative to attend state functions then they would be considered a guest of that state and should act accordingly. The NEC does not express opinions or get involved in controversy within a state when authorized as the representative.

* The NEC has been elected by a district to represent, to serve, and to do the best job that they can do. The title of National Executive Committee Member is not to be used unless authorized on behalf of national headquarters to do so. NEC’s do not get involved in state problems nor shall they usurp the powers of the State Commander. Remember that good will and understanding is part of this job.

* Districts cannot have fundraisers.
DAV AUXILIARY
FUND RAISING GUIDELINES

UNITS:
Units may conduct fundraisers with appropriate written approval as follows:

- Unit fundraisers must be first discussed and approved by membership majority at a regular business meeting.
- Written request is then submitted to the parent chapter for approval. (In cases where there is no parent chapter, units submit the written request to the DAV state department).
- Upon chapter approval, said chapter must submit the approved unit fund raising request to the respective DAV state department.
- Upon DAV Department Executive Committee (DEC) review, the DAV state department shall then decide on whether or not approval will be granted and shall notify the unit.

STATE AUXILIARY DEPARTMENTS:
Should an Auxiliary state department wish to conduct a fundraiser they must submit a written request to the DAV State Department. The project will then be vetted by the DAV Department Executive Committee (DEC) prior to the final decision of the DAV State Department. Written notice is then provided to the Auxiliary State Department.

CONTRACTS:
If a contract is involved with any fundraiser, prior to signing, the DAV state department will submit a copy to DAV National Headquarters to be submitted to the DAV National Executive Committee for approval.

- Under no circumstances may fund raising solicitations be sent by mail.
- The Auxiliary logo or seal may not be used on any fund raising project.
- Approval is not required for logo/seal usage on stationery items, business cards, name badges, hats, shirts, etc., and other items that promote the name and positive mission of the organization.
- Items bearing the DAV Auxiliary seal or logo may be sold to other members of the organization at cost, but may not be used to generate revenue.
OFFICIAL LOGO OF THE DISABLED AMERICAN VETERANS AUXILIARY

The official logo and seal of the Disabled American Veterans Auxiliary are under a copyright and usage is restricted.

No fundraisers are to be conducted using the official logo or seal of the Disabled American Veterans Auxiliary.

No unit or state department may enter into a contract without the explicit permission of DAV parent chapter, DAV State Department, and DAV National Executive Committee. Refer to DAV National Bylaws, Article 15, for additional requirements.

Approval is not required for logo usage on stationery, business cards, name badges, hats, clothing items, etc., provided that NO items are used to generate revenue for the unit or state department. However, items with the organization’s logo may be made available for sale to other members at cost only.

The logo is not to be used for the personal benefit or income of any individual.
# Secure Your ID Day

## Records Retention Schedule

(Source: Internal Revenue Service)

<table>
<thead>
<tr>
<th>Item</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accident reports/claims (settled cases)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Accounts payable ledgers &amp; schedules</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Accounts receivable ledgers &amp; schedules</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Audit reports</td>
<td>Permanently</td>
</tr>
<tr>
<td>Bank reconciliations</td>
<td>2 yrs.</td>
</tr>
<tr>
<td>Bank statements</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Capital stock &amp; bond records: ledgers, transfer</td>
<td></td>
</tr>
<tr>
<td>registers, stubs showing issues, record of interest</td>
<td></td>
</tr>
<tr>
<td>coupons, options, etc.</td>
<td>Permanently</td>
</tr>
<tr>
<td>Cash books</td>
<td>Permanently</td>
</tr>
<tr>
<td>Charts of accounts</td>
<td>Permanently</td>
</tr>
<tr>
<td>Checks (canceled – see exception below)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Checks</td>
<td></td>
</tr>
<tr>
<td>(canceled for important payments – i.e., taxes,</td>
<td></td>
</tr>
<tr>
<td>purchases of property, special contracts, etc.</td>
<td></td>
</tr>
<tr>
<td>Checks should be filed with the papers pertaining</td>
<td></td>
</tr>
<tr>
<td>to the underlying transaction,</td>
<td>Permanently</td>
</tr>
<tr>
<td>Contracts, mortgages, notes, &amp; leases</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>(expired)</td>
<td></td>
</tr>
<tr>
<td>Correspondence (general)</td>
<td>Permanently</td>
</tr>
<tr>
<td>Correspondence (routine) with customers</td>
<td>2 yrs.</td>
</tr>
<tr>
<td>and/or vendors</td>
<td></td>
</tr>
<tr>
<td>Deeds, mortgages, &amp; bills of sale</td>
<td>Permanently</td>
</tr>
<tr>
<td>Depreciation schedules</td>
<td>Permanently</td>
</tr>
<tr>
<td>Duplicate deposit slips</td>
<td>2 yrs.</td>
</tr>
<tr>
<td>Employment applications</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Expense analyses/expense distribution</td>
<td></td>
</tr>
<tr>
<td>schedules</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Financial statements</td>
<td></td>
</tr>
<tr>
<td>(year-end, other optional)</td>
<td>Permanently</td>
</tr>
<tr>
<td>Garnishments</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>General/private ledgers, year-end trial balance</td>
<td>Permanently</td>
</tr>
<tr>
<td>Insurance policies (expired)</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Insurance records, current accident reports, claims, policies, etc.</td>
<td>Permanently</td>
</tr>
<tr>
<td>Internal audit reports (longer retention periods may be desirable)</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Internal reports (miscellaneous)</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Inventories of products, materials, and supplies</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Invoices (to customers, from vendors)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Journals</td>
<td>Permanently</td>
</tr>
<tr>
<td>Minute books of directors, stockholders, bylaws, and charter</td>
<td>Permanently</td>
</tr>
<tr>
<td>Notes receivable ledgers &amp; schedules</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Option records (expired)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Patents &amp; related papers</td>
<td>Permanently</td>
</tr>
<tr>
<td>Payroll records &amp; summaries</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Personnel files (terminated)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Petty cash vouchers</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Physical inventory tags</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Plant cost ledgers</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Property appraisals by outside appraisers</td>
<td>Permanently</td>
</tr>
<tr>
<td>Property records, including costs, depreciation reserves,</td>
<td></td>
</tr>
<tr>
<td>year-end trial balances, depreciation schedules,</td>
<td></td>
</tr>
<tr>
<td>blueprints, &amp; plans</td>
<td>Permanently</td>
</tr>
<tr>
<td>Purchase orders (except purchasing department copy)</td>
<td>1 yr.</td>
</tr>
<tr>
<td>Purchase orders (purchasing department copy)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Receiving sheets</td>
<td>1 yr.</td>
</tr>
<tr>
<td>Retirement &amp; pension records</td>
<td>Permanently</td>
</tr>
<tr>
<td>Requisitions</td>
<td>1 yr.</td>
</tr>
<tr>
<td>Sales commission reports</td>
<td>3 yrs.</td>
</tr>
<tr>
<td>Scrap &amp; salvage records</td>
<td></td>
</tr>
<tr>
<td>(Inventories, sales, etc.)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Stenographers’ notebooks</td>
<td>1 yr.</td>
</tr>
<tr>
<td>Stocks &amp; bonds certificates (canceled)</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Stockroom withdrawal forms</td>
<td>1 yr.</td>
</tr>
<tr>
<td>Subsidiary ledgers</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Tax returns &amp; worksheets, revenue agents’ reports, and other</td>
<td></td>
</tr>
<tr>
<td>documents relating to determination of</td>
<td></td>
</tr>
<tr>
<td>income tax liability</td>
<td>Permanently</td>
</tr>
<tr>
<td>Time books/cards</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Trademark registrations and copyrights</td>
<td>Permanently</td>
</tr>
<tr>
<td>Training manuals</td>
<td>Permanently</td>
</tr>
<tr>
<td>Union agreements</td>
<td>Permanently</td>
</tr>
<tr>
<td>Voucher register &amp; schedules</td>
<td>7 yrs.</td>
</tr>
<tr>
<td>Vouchers for payments to vendors, employees, etc.</td>
<td></td>
</tr>
<tr>
<td>(includes allowances and reimbursement of employees, officers, etc.,</td>
<td></td>
</tr>
<tr>
<td>for travel and entertainment expenses)</td>
<td></td>
</tr>
<tr>
<td>Withholding tax statements</td>
<td>7 yrs.</td>
</tr>
</tbody>
</table>

*The retention period is the number of years from the date the tax return was filed. All material presented is for general information only and should not be acted upon without professional assistance.*
Reactivating a Unit

If a unit wishes to reactivate within the 18 month time frame they must do the following:

- Contact those members in the state at-large who previously belonged to the unit and may wish to transfer from the state at-large. This list can be provided by national headquarters.

- These members do not have to be new members since this is a reactivation of a unit that existed before. However, in order to reactivate, the unit must have ten senior members willing to hold an office or chairmanship in order for the unit to function.

- Transfers must be filled out for each member. Note: state and/or national at-large transfers will take immediate effect in the reactivated unit.

- An election shall be held.

- A completed officer report form, completed transfer forms, applications and any money that is to be applied to the members shall be mailed directly to National Headquarters along with a letter requesting reactivation.

- If all information is correct, the unit shall be activated under the original charter. The charter should have been sent to National Headquarters when the unit disbanded.

- If the unit charter has been misplaced and was not sent in to National Headquarters a duplicate will be issued for a fee of $10.00. It shall state “duplicate” on the charter.

- The state department shall be instructed to return any money that may have been submitted by the unit at the time when the unit disbanded.

- If the unit was indebted (mandates) to the organization at the time of revocation, they must remit that indebtedness payment before reactivation can be processed.

It is important to remember that when a unit disbands, the money that they have must be sent to their state department and not given to the parent organization. The state department will hold the funds in escrow for 18 months. The instructions above are for a unit that is reactivating prior to a deadline of 18 months. After 18 months, the unit cannot reactivate under the existing charter and all funds will then go into the general fund of the state department.
DAV Auxiliary Request for Labels

Date ________________

State Department of ___________________  Unit/Chapter #____________

Our unit/chapter/state department is requesting DAV Auxiliary unit mailing labels to be used for the following: (check all that apply)

☐ National at-large  (No charge)

☐ State at-large  (No charge)
  (Specify zip codes.  If indicating additional zip codes on reverse side, check here ☐)
  ___________  ___________  ___________  ___________  ___________  ___________
  ___________  ___________  ___________  ___________  ___________  ___________
  ___________  ___________  ___________  ___________  ___________  ___________

Labels will be used for:

* ☐ Newsletters, Meeting/Election Notices.  Number of sets __________

* ☐ Fund Raisers (Copy of Chapter/Department permission must be submitted with this request.)  – Number of sets __________

*Label charge shall be determined based upon the number of labels per order as follows:

  1 – 1,000 - $15.00
  1,001 – 5,000 - $25.00
  5,001 – 10,000 - $50.00

*Select Label Format ☐
  ☐ All Members
  ☐ Active Members Only
  ☐ Other _______________

*Select Label Sequence ☐
  ☐ Member Name
  ☐ Member Code Number
  ☐ Zip Code

Send labels to:

Name_______________________________________________
Title________________________________________________
Street Address________________________________________
City, State, Zip____________________________________
Telephone Number____________________________________

Please return form and payment (check or money order) to the address listed below.

PLEASE ALLOW 3 WEEKS FOR DELIVERY

DAV Auxiliary
3725 Alexandria Pike
Cold Spring, KY  41076

Office Use Only
Mail Date __________  Payment Amt. $_________  Check #_________  Total Pages _______  Prepared by_______
PROCEDURE FOR DISBANDING AN AUXILIARY UNIT
(This should be kept in your permanent files)

To: All Units and State Departments of the Disabled American Veterans Auxiliary

To possibly avoid any confusion on the part of the membership or national headquarters concerning the procedure units should follow when the membership itself has decided that due to inactivity, lack of interest, or the failure to hold the required amount of business meetings, they find their only recourse is to disband, we are asking that the following steps be observed.

- **First contact the state department.** The state department must send a letter to all members stating that at the next business meeting (give date and time) this subject will be discussed and that if they are interested in keeping the charter they should be present at that meeting. Further state that their absence would indicate their vote to disband. A copy of the letter must be sent to national headquarters.

- Should the membership vote to disband and the state department is in concurrence, a letter requesting revocation must be submitted by the state department. **No action will be taken by national headquarters without this official notification.**

- Should a chapter disband, the Auxiliary unit may still retain its charter upon vote of the unit. National headquarters must be so advised.

All property, money* and effects of the unit, with the exception of the charter shall revert to the State Department to be held in trust for a period of 18 months. In the event the unit charter is not reissued within a period of 18 months, said property shall become the absolute property of the State Department.

**The original charter must be sent to National Headquarters for safekeeping.**

The purpose of the procedure listed above must be followed in order to give each member notice beforehand that the charter will be revoked due to inactivity. This gives the membership the opportunity to possibly become interested and work to save the unit charter.

*Unit funds shall go to the state department when a unit disbands since it cannot be expended for any other activity, program, or to other organizations, including the parent chapter, without a vote of the unit body at a regular meeting with a quorum present.
AUTHORIZATION AGREEMENT FOR DAVA DIRECT DEPOSIT
DISABLED AMERICAN VETERANS AUXILIARY
FEDERAL ID NUMBER 84-0505501

I HEREBY AUTHORIZE The Disabled American Veterans Auxiliary National Headquarters to initiate electronic transfer of funds to our account in the depository named below. This authorization is to remain in full force and effect until National Headquarters has received written notification of its termination in such time and in such a manner as to afford National Headquarters and the depository a reasonable opportunity to act on it.

DEPARTMENT/UNIT__________________________________NO.__________________

STREET ADDRESS _______________________________________________________

PHONE_______________________________DATE__________________

AUTHORIZED BY___________________________TITLE__________________

(SIGNATURE)

NOTE: Depending on the type of account you have selected for Direct Deposit, please present either a blank savings account deposit slip or a void check or deposit slip from your account at the time this form is brought to your financial institution for them to complete. This will ensure that the proper account is credited.

THE SECTION BELOW TO BE COMPLETED BY FINANCIAL INSTITUTION

BANK OR SAVINGS & LOAN_________________________BRANCH__________

STREET ADDRESS_____________________________________________PHONE__________________

CITY_____________________________________________________________STATE________________ZIP__________________

ACCOUNT: (SELECT ONE) ( ) Checking (including “Now” account) ( ) Savings

TRANSIT/ABA NUMBER_________________________ACCOUNT NUMBER_________________________(nine-digit number)

TITLE OF ACCOUNT________________________________________________________

SIGNATURE________________________________________________________

(Signature of bank employee completing form)

TITLE____________________________________________________________DATE____________

National Headquarters will continue to provide distribution activity reports along with a notice stating the amount being electronically deposited to the account indicated above.
AMERICANISM REPORT 2015-2016

Fill out in triplicate: Send two copies to address listed at right:
Keep one copy for Unit files.

Must be postmarked by: ________________

Additional pages may be added to further explain any information given on this report. Please remember to number the items on any additional pages to correspond with the questions.

PLEASE PRINT

NAME OF UNIT ____________________________ UNIT NUMBER __________
CITY ____________________________ STATE ________________
NUMBER OF SENIOR MEMBERS ____________

1. Number of Americanism Programs your Unit sponsored ____________ Essay Contests
   Sponsored ____________

2. Number and size of flags your Unit presented. 4 x 6 in. ____________
   4 x 6 ft. ____________ 5 x 8 ft. ____________

3. Did your unit donate to Freedoms Foundation? ____________

4. Number of pieces of literature your unit distributed to schools or groups on Flag Information and other Americanism materials. ____________
   What type of literature was distributed? ____________________________________________
   ____________________________________________

5. How many Americanism reports were given at your meetings? ____________

6. Did your unit observe all holidays and display the American Flag when possible? ____________

7. Were Unit members encouraged to vote? ____________ Others? ____________

8. Did your Unit support the MIA/POW program? ____________

9. List Americanism activities such as Memorial and Veterans Day Services, Parades, etc. (Do not include Special Americanism Program.)
   ____________________________________________
   ____________________________________________
   ____________________________________________

Submitted by:

Signature of Commander and/or Chairman
SPECIAL AMERICANISM PROGRAM 2015-2016

Fill out in triplicate: Send two copies to
address listed at right:
Keep one copy for Unit files.

Must be postmarked by: ________________

PLEASE PRINT
NAME OF UNIT ____________________________ UNIT NUMBER _________
CITY ____________________________ STATE ______________
NUMBER OF SENIOR MEMBERS ____________
CATEGORY 10 TO 200 ______________
CATEGORY 201 AND OVER ______________

A Special Americanism Program has to be an event that the general public and dignitaries are invited to attend. Suggested topics could be articles within the Auxiliary Manual, citizenship, veterans, special essays, patriotic plays, etc. Additional pages may be added to further describe this program.

1. Did you have a Special Americanism Program? _____________________________________________

2. Date of Program ________________________________________________
   Type of Program ________________________________________________

3. Was the public invited? _____________________________________________
   Did you have a write-up in your local newspaper? _________________________
   Radio Coverage? _________________________ TV coverage? _________________________
   List any dignitaries who attended: ____________________________________________
   ____________________________________________
   ____________________________________________
   ____________________________________________
   Total number in attendance. ________________

EXPLAIN YOUR PROGRAM: (Please do not attach pictures or newspaper clippings)

Submitted by: __________________________________________________________________________

Signature of Commander and/or Chairman

71
COMMUNITY SERVICE REPORT 2015-2016

Fill out in triplicate. Send two copies to address listed at right:
Keep one copy for Unit files.

Must be postmarked by:

PLEASE PRINT

NAME OF UNIT ___________________________________________ UNIT NUMBER __________
CITY ___________________________ STATE ___________________________
NUMBER OF SENIOR MEMBERS ______________

How many of the total senior members are working on Community Service? ______________

This report should include all activities of the Unit and its members. Please refer to the Community Service Program and the Table of Values in our Auxiliary Manual as your guideline. Monetary donation by the Unit should be listed only in the column for Unit Checks. All other cash donations from members should be listed in the next column. Do not take credit for the National address label program or the Service/Support Program. If the total amount exceeds $1,000, use the reverse side to itemize expenditures. Feel free to add any projects important to you. Remember, these are community projects and meant to benefit those outside of our organization within the community. Do not include relatives.

<table>
<thead>
<tr>
<th>1. Family Services:</th>
<th>Direct aid to families, visits, clothing, food, transportation, etc.</th>
<th>Miles</th>
<th>Hours</th>
<th>Donation by Unit Checks</th>
<th>Value all Other Donations</th>
<th>Cash Donations from Members</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Professional &amp; Trade Services:</td>
<td>Medical, dental services or payments, plumber, electrician, etc.</td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. General Services to Community:</td>
<td>Organized activities, Meals on Wheels, senior citizens, youth groups, fund drives, blood bank, church work, neighborhood watch, etc.</td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Recreation &amp; Entertainment:</td>
<td>Parties, gifts, etc.</td>
<td></td>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 5. Special Projects and Programs: | Museums, historical projects, etc., tutoring of illiterates, Local Veterans Assistance Program, Handicapped Parking Awareness, etc. |       |       | $                       |                           |                             |
| Totals: | $                       | $  | $       | $                       |                           |                             |

Total of All Donations $___________________

Use reverse side for explanation and detail or attach one additional sheet.

Submitted by: ________________________________________________
Signature of Commander and/or Chairman
HOSPITAL REPORT 2015-2016
(FOR NON-VA WORK)

Fill out in triplicate. Send two copies to
address listed at right:
Keep one copy for Unit files.
Must be postmarked by: ____________________

This report includes all volunteer services performed by the Unit and its members in and for the hospitalized and residents in the following facilities: Non-VA hospitals, health care centers; state and regional treatment centers; and state veterans’ homes.

PLEASE PRINT OR TYPE

NAME OF UNIT ________________________________ UNIT NUMBER _________
CITY __________________________ STATE ________________

NUMBER OF SENIOR MEMBERS ________

GIVE THE TOTAL FOR EACH ITEM LISTED BELOW:

1. Number of unit members performing volunteer services: ________________
2. Number of sponsored volunteers: ________________
3. Number of visits to patients and residents in the above facilities: ________________
4. Number of hours spent performing volunteer services in the above facilities and/or for patients and residents. (Examples: Parties, reading, baking, sewing, errands, legal aid time, transportation to appointments, etc. ________________
5. Miles traveled in performance of volunteer duties: ________________
6. Program costs (assessed at actual value) . . . .
   a) Purchased items…………… $ __________
   b) Donated items……………… $ __________
   c) Professional services……… $ __________
   d) Entertainment…………….. $ __________
   e) TOTAL value of unit’s non-VA hospital programs………. $ __________

NOTE: Add 6a) through 6d) to get TOTAL. Provide explanation of each line item on reverse side.

7. Number of badges issued to unit members: ________________

8. Describe, in detail, unit projects or activities that “made a difference” in bringing cheer and comfort to patients and residents in the facilities you served. Include the number of members participating in each activity. Use reverse side and/or a separate sheet for your detailed explanation.

Submitted and signed by:
______________________________________ and/or __________________________________________
Unit Commander                                                                 Unit Chairman
JUNIOR ACTIVITIES REPORT 2015-2016

Please report all Junior Activities on this form.

Fill out in triplicate. Send two copies to address listed at right:

Keep one copy for Unit files.

Must be postmarked by: ________________

PLEASE PRINT:

NAME OF UNIT ____________________________ UNIT NUMBER _________

CITY ____________________________ STATE __________

Total Junior Membership ________________ Do you have a chartered Junior Unit? __________

How many Juniors participated in activities? __________

Are you sponsoring a DAVA Junior member for the 2015-2016 national competition? __________ If yes, don’t forget to send in a junior award questionnaire and attached resume.

List number of volunteer hours and describe the activities in the categories listed below. (Additional paper may be used as well as a few snapshots.)

1) VA Medical Center: ________ Hours Activities: ____________________________

2) Hospital/Nursing Home: ________ Hours Activities: __________________________

3) Community Service: ________ Hours Activities: ____________________________

4) Forget-Me-Not Drives: ________ Hours Activities: __________________________

5) Americanism: ________ Hours Activities: ____________________________

6) Chapter/Unit Activities: ________ Hours Activities: __________________________

7) Veterans Day: ________ Hours Activities: ____________________________

8) School/Church: ________ Hours Activities: ____________________________

9) Miscellaneous: ________ Hours Activities: ____________________________

__________ Total Hours

Submitted by:

Signature of Commander and/or Chairman
DAVA JUNIOR AWARD QUESTIONNAIRE

Directions: Please read carefully

1) Do NOT send this form if you do not have a candidate.
2) Form must be completed by Chairman or Commander.
3) Chairman or Commander shall write and attach a brief synopsis relating their knowledge of candidate’s abilities or activities.
4) Fill out in triplicate. Keep one copy for unit files.

Send two copies to address listed at right:

5) Questionnaire must be postmarked by:

6) A resume in the candidate’s own handwriting MUST accompany this form.

7) A unit does not have to have a junior charter to nominate a candidate for any of the Junior Awards.

A total of three awards will be given. Please place a checkmark by the age group of the candidate.

☐ Outstanding Junior Award (Ages 7 - 10) ☐ Outstanding Junior Award (Ages 11 - 14) ☐ Outstanding Junior Award (Ages 15 - 17)

** PLEASE NOTE THAT NO JUNIOR IS ELIGIBLE TO WIN THE SAME TITLE TWICE **

PLEASE PRINT

Candidate’s Name ________________________________ Birth Date ______________
Address ________________________________ City ________________ State ________ Zip ________
Member of Unit (Name and Number) ________________________________ State ________
Number of years as an active DAVA member ______________

List total volunteer hours for the CURRENT MEMBERSHIP YEAR ONLY for the following:

<table>
<thead>
<tr>
<th>Category</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA Medical Center</td>
<td></td>
</tr>
<tr>
<td>Hospital/Nursing Home</td>
<td></td>
</tr>
<tr>
<td>Community Service</td>
<td></td>
</tr>
<tr>
<td>Forget-Me-Not Drive</td>
<td></td>
</tr>
<tr>
<td>Americanism</td>
<td></td>
</tr>
<tr>
<td>Chapter/Unit Activities</td>
<td></td>
</tr>
<tr>
<td>Veterans Day</td>
<td></td>
</tr>
<tr>
<td>School/Church</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous</td>
<td></td>
</tr>
</tbody>
</table>

NOTE: Participation in the above categories should be fully explained and verified on the candidate’s attached resume. Please use that resume to list all other activities (Ex.: Scouts, 4-H, etc.) and hours for 2015-2016 only. Additional snapshots may be submitted.

Candidate’s Parent/Guardian
Signature ________________________________ Signature ________________________________

Commander and/or Chairman’s Signature ________________________________
**LEGISLATIVE REPORT 2015-2016**

Fill out in triplicate. Send two copies to address listed at right:

Keep one copy for Unit files.

Must be postmarked by: __________

PLEASE TYPE OR PRINT

NAME OF UNIT _______________________________ UNIT NUMBER __________

CITY _______________________________ STATE __________

TOTAL NUMBER OF SENIOR MEMBERS __________

**THIS NATIONAL LEGISLATIVE REPORT IS FOR LEGISLATION ON VETERANS' BILLS ONLY**

Contacts reflect the number of letters, telephone calls, telegrams, emails, faxes and personal visits made and/or received by a member from: Federal level - President, Senators or Representatives; State level - Governor, State Senators or Representatives; Local level - Mayor, City or Town Council, County Commissioners or other elected officials. Follow-ups are “Thank you for your support” letters on listed bill. Do not attach bulletins or letters to your report.

1. Total number participating in Legislative program ________________
2. Total number of meetings Unit participated in discussion on Veterans’ bills ________________
3. Total Legislative contacts and Follow-Up “Thank You” letters at Federal, State, and Local Levels:

<table>
<thead>
<tr>
<th>Bill #</th>
<th>Topic</th>
<th># of Federal Contacts</th>
<th># of Federal Follow-Up</th>
<th># of State Contacts</th>
<th># of State Follow-up</th>
<th># of County, City, Local Contacts</th>
<th># of County, City, Local Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Contacts & Follow-up “Thank You” letters (this page)

Totals from the back side of this report (if applicable)

GRAND TOTAL

If additional space is needed, list bill numbers, topic, and number of contacts on the back of this report.

Submitted by: ____________________________

Signature of Commander and/or Chairman
3. Total Legislative contacts and Follow-Up “Thank You” letters at Federal, State, and Local Levels.

<table>
<thead>
<tr>
<th>Bill #</th>
<th>Topic</th>
<th># of Federal Contacts</th>
<th># of Federal Follow-Up</th>
<th># of State Contacts</th>
<th># of State Follow-up</th>
<th># of County, City, Local Contacts</th>
<th># of County, City, Local Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Contacts & Follow-Up “Thank You” letters (this page)
MAE HOLMES REPORT 2015-2016

Complete this report even if your unit did not meet its quota.

Complete this report LAST as the totals must agree with your other reports. You may use the reverse side for additional explanation and details.

Make four copies. Send three copies to address listed at right:
Keep one copy for your unit records.

Must be postmarked by:____________________

PLEASE TYPE OR PRINT:

NAME OF UNIT ____________________________ UNIT NUMBER __________
CITY ____________________________ STATE __________________________

Number of Senior Members __________
Number of Junior Members __________ Unit Membership Quota __________
Total number of Members __________ Was quota met by April 1, 2016? _________

1. Membership: Did your unit have a membership drive and/or program? __________
How many members were obtained?_________ Explain your membership drive and/or program.

2. Americanism: Number of programs, parades, and essay contests which your Unit sponsored or participated __________. Describe the most outstanding:

3. Legislation: Total number of meetings Unit participated in discussion on Veterans’ bills? __________
Total number of Federal, State and Local legislative contacts. __________

4. Junior Activities: Describe the activities of your junior members:

<table>
<thead>
<tr>
<th></th>
<th>Total Value ($)</th>
<th>Hours</th>
<th>Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Hospital</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. VAVS</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td>7. Community Service</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: If over $1000 reported in Total Value column for any of the reports, attach copy of the report(s) FORM ONLY - no attachments

8. Explain any other SPECIAL projects which your unit sponsored or were participants:

Submitted by: _________________________________
Signature of Unit Commander
Fill out in triplicate. Send two copies to address listed at right: Keep one copy for Unit files
Must be postmarked by: ______________________

PLEASE PRINT OR TYPE

NAME OF UNIT ________________________________________ UNIT NUMBER _____
CITY ____________________________ STATE ___________
TOTAL NUMBER OF SENIOR MEMBERS ___________
LOCATION OF DVA MEDICAL CENTERS __________________________
LOCATION OF DVA SATELLITE CLINICS __________________________

1. Senior members working as: 
Regularly scheduled (R/S) volunteers (Senior members) _______ _______
Sponsored volunteers (non-members) _______ _______
Occasional volunteers (non R/S) _______ _______
TOTAL _______ _______

Number of NEW VA volunteers that were recruited this year _______

2. List Unit Projects and Value of each (one project per line). If additional room is needed, please use reverse side or attach additional sheet.
________________________________________________________________________
$ _______
________________________________________________________________________
$ _______
________________________________________________________________________
$ _______
Total…. $ _______

3. Cash Donations (one project per line). If additional room is needed, please use reverse side or attach additional sheet. (Examples: DAV Transportation Network, Veterans Writing Project, or Winter Sports Clinic).
________________________________________________________________________
$ _______
________________________________________________________________________
$ _______
________________________________________________________________________
$ _______
Total…. $ _______

TOTAL VALUE OF 2 and 3……………………………………………………………………. $

If total exceeds $1,000, expenditures must be itemized on back of report

4. Was a Special Fundraiser held to benefit VAVS? Yes _____ No _____
Total number of volunteer hours for the program _______ Total amount raised $ _______

Briefly explain the program:

If more space is needed to complete this report, please continue on the reverse side or attach additional sheet.

*DVA includes VAMC, VA Outpatient Clinics, VA Hospice, VA Home-Health, VA Nursing Homes, VA Foster Care, VA Vet Centers, National VA Cemeteries, VA Regional Offices. State Veterans’ Homes and Cemeteries if a Memorandum of Understanding (MOU) is in place. Hours must be certified through VAMC.

Submitted by: ________________________
Signature of Commander and/or VAVS Chairman