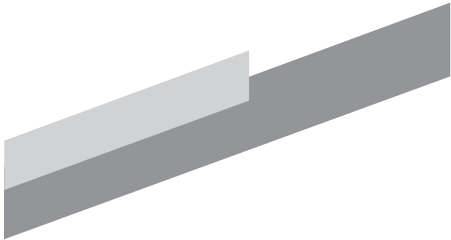




CHAPTER OFFICER GUIDE





Dear DAV Leader:

For leaders to succeed, it is critical that they understand their duties, responsibilities and authority.

This Chapter Officer Guide is intended to help new officers get their feet on the ground and to act as a reference for those who've served for years. It was developed with feedback from DAV leaders at every level to empower elected officers and members so we can be as effective as possible in our mission to ensure the promise is kept to those who served and the families who share in their sacrifices.

Additional information can be accessed online at **dav.org/member-resources**. Page 16 offers instructions on accessing this site.

We encourage you to read this guide carefully. Even if you have been involved in chapter or department leadership for many years, you can benefit by refreshing your memory. Additionally, it will be useful in helping newer DAV leaders move into positions of responsibility.

Finally, this is only a guide. It does not replace any provisions of the National Constitution and Bylaws and Regulations or mandates.

Sincerely,

Barry A. Jesinoski
National Adjutant



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Commander

The commander shall preside at all regular or special meetings of the chapter. He/she shall maintain order and dispatch such business as may legally come before him/her. All checks or vouchers issued by the chapter treasurer may be countersigned by the commander.

He/she shall perform all other duties that may reasonably be assumed to be incidental to the office, including those set forth in the chapter's Constitution and Bylaws and in the Official DAV Ritual and such other duties as may be lawfully delegated to him/her by the chapter.

It is the administrative responsibility of the commander to:

1. Open the meeting at the appointed time by calling the meeting to order.
2. Announce in proper sequence the business that comes before the chapter in accordance with the Official DAV Ritual.
3. Recognize members who are entitled to the floor.
4. State and put to vote all questions that legitimately come before the chapter as motions or that otherwise arise in the course of the proceedings and announce the results of each vote; or, if a motion is made that is not in order, to rule it out of order.
5. Expedite the business in every way compatible with the rights of members.
6. Decide all questions of order, subject to appeal.
7. Declare the meeting adjourned when the chapter so votes or at the time prescribed in the program.
8. Maintain order of the meeting at all times.

The commander has a fiscal responsibility to:

1. Ensure the safeguarding of funds, properties and other assets against unauthorized use or loss.
2. Ensure all disbursements of funds are properly approved in accordance with the chapter Bylaws.

3. Comply with standards established by the National Executive Committee for audits of chapter establishments, organizations, programs, activities and functions. These standards require chapters to be responsible for providing adequate audit coverage of their programs as an aid in determining whether funds have been applied efficiently, economically, effectively and consistently with program objectives and underlying agreements.

At each meeting the commander should have available:

- A copy of the chapter, department and national Constitution Bylaws & Regulations,
- A copy of *Robert's Rules of Order, Newly Revised* (available at local bookstores or the library),
- A list or agenda of the complete order of business and
- A list of all committees.

The commander also serves as the official spokesperson for the chapter in the community and may not serve as chapter adjutant or treasurer.

Senior Vice Commander

The senior vice commander shall perform the duties of his/her station as set forth in the Official DAV Ritual. He/she shall encourage friendship among the members of this organization, discourage discord and promote harmony. Subject to the direction of the chapter, he/she shall act as chairperson of membership solicitation activities to the end that every eligible veteran may become a member. With the approval of the chapter, the senior vice commander may appoint one or more members to assist him/her in such membership activities. The senior vice commander may not serve as adjutant or treasurer.

Junior Vice Commander

The junior vice commander shall perform the duties of his/her station as set forth in the Official DAV Ritual. He/she shall see that every member is given a reasonable opportunity to state his/her views on any subject under discussion in a meeting of the chapter, not inconsistent with the chapter's Constitution and Bylaws or *Robert's Rules of Order, Newly Revised*.

He/she shall, at all times, encourage loyalty to the United States of America, to DAV and to the members of the chapter. Subject to the direction of the chapter, he/she shall act as chairperson of the Americanism activities of the chapter and, with the approval of the chapter, may appoint one or more members to assist him/her as such chairperson. The junior vice commander may not serve as adjutant or treasurer.

Adjutant

The adjutant is responsible for keeping the chapter's records and managing the chapter's official correspondence. He/she must keep detailed records of the chapter's meetings and business affairs. All motions considered by the chapter should be recorded along with the names of the members who make, second or speak on motions. All monies received or spent by the chapter must be recorded in his/her records.

The adjutant is responsible for ensuring chapter members are aware of the times and locations of meetings. If a special meeting is to be called, the reason for the meeting should be stated on the meeting notice.

At each business meeting, the adjutant should read the minutes of the preceding meeting and make sure that a motion of acceptance or rejection is passed.

At each chapter meeting, the adjutant should read all correspondence received between meetings and see that all matters that require action by the chapter are properly disposed of. He/she should answer all correspondence promptly and file copies of his/her answers with the chapter records.

The adjutant is responsible for notifying officers, committee members and delegates of their election or appointment, as well as furnishing committees with whatever documents are required for the performance of their duties.

The adjutant shall make the minutes and records of the chapter available to members upon request. The adjutant is responsible for furnishing a list of convention delegates to National and Department Headquarters.

The adjutant must work closely with the commander, treasurer and other chapter officers

DAV

Officer Election Report

(Please Type or Print)

Chapter or Department _____

Location: City _____ State _____

Date of Annual Election _____ Date of Installation _____

Address of Regular Meetings _____

Street Address _____ City & State _____ ZIP _____

Time & Day of Regular Meetings _____

Time _____ Day _____ Week of Month _____

Website Address _____ Chapter Phone _____

Officers Elected For Year Beginning _____ 20 _____ Ending _____ 20 _____

Commander

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Benefits Protection Team Leader

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Sr. Vice Commander

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Membership Chairman

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

1st Jr. Vice Commander

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Judge Advocate

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Adjutant

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

Officer Authorized to Receive Mail

Name _____

Office Held _____

Address for DEPT/CHPT Mail _____

City/State/ZIP _____

Phone _____ Fax _____

Email _____

Treasurer

Name _____

Mailing Address _____

City/State/ZIP _____

Member Code# _____ Phone _____

Email _____ Fax _____

The Preceding Names and Positions Are Hereby Certified By:

(Form must be signed by the new commander and new adjutant.)

Commander: _____ Date: _____

Adjutant: _____ Date: _____

NOTE: For Service Officer recommendations, use the Service Officer Nominations form and follow the submission instructions on that form.

This form must be completed and returned to National Headquarters within 10 days after installation in compliance with Art. 8, Sec. 8.3; Art. 9, Sec. 9.2 and Art. 10, Sec. 10.1 of the DAV National Bylaws.

Email to National Headquarters: officereportinfo@daav.org • Send a copy to your DAV state department (see instructions)

Send a copy to nearest DAV National Service Office (see instructions)

901005 (12/12)

Figure 1


in order to efficiently carry out his/her duties. The adjutant may not serve as chapter commander at the same time.

The adjutant is also responsible for filing the Officer Election Report (OER) form immediately following the annual election and installation of officers, in compliance with the National Bylaws, Article 9, Section 9.2. The proper form is shown in Figure 1. OER's should be filled out and submitted via MyDAV.org. If not possible, chapter officers should route their OER's to their respective departments for submittal.

The adjutant is responsible for the membership records and should make certain that they are kept up to date. Official membership records are kept by using the DAV Membership Activity Report (Figure 2), which is furnished by National Headquarters. The adjutant shall also be responsible for timely notification to National and Department Headquarters of changes of address and deaths of members.

4

5

 KEEPING OUR PROMISE TO AMERICA'S VETERANS		DAV Membership Activity Report Range: 1/1/2019 through 6/30/21		Execution Date: 5/30/2021 8:39:46 AM
Member Name	Membership	Status	Activity Date	Activity
			01 - DAV Alabama - 01 - Tuscaloosa #1	
			Add Change	05/06/2021
			Decreased	06/15/2021
			New	01/11/2021
			Payment	01/11/2021

The following are some of the membership transactions that will appear from time to time on the report shown in Figure 2.

Transfer Out	New Life	Unclaimed
Transfer In	Full Paid Life	Deceased
Change of Address	Restore	Canceled

All chapter records should be maintained for seven (7) years. This does not apply to original documents that do not expire, such as, but not limited to, chapter Charter, contracts, licenses, leases, Constitution and Bylaws, regulations, rulings by the national judge advocate, tax returns and audits.

Treasurer

It is the responsibility of departments and chapters to protect DAV assets from theft or conversion. This responsibility includes, without limitation, implementation of sound financial management practices and the purchase of insurance to cover theft losses. In the absence of such insurance, the National Organization shall provide a mechanism by which departments and chapters may be reimbursed for the theft or conversion of department or chapter assets by an elected or appointed department or chapter officer. Such reimbursement shall be limited to \$100,000 per occurrence and be subject to a deductible amount of \$5,000. Such reimbursement shall be made only upon a full and final adjudication of theft or conversion by a court of competent jurisdiction. Such reimbursement shall also be subject to the limits and conditions of the reimbursement program as determined by the Board of Directors. This amendment took effect January 1, 2006.

The duties of the treasurer will vary from chapter to chapter. In most instances, the treasurer holds the funds deposited with him/her and pays them out when approved by the chapter. All financial disbursements of the chapter must be made by

DISABLED AMERICAN VETERANS	
Monthly Chapter Financial Report	
CHAPTER _____	DATE _____
(NAME AND NUMBER)	
FOR PERIOD FROM _____	TO _____ 20____ MEETING OF _____
BEGINNING BALANCE (CASH ASSETS) \$ _____	
INCOME (GROSS)	
Dues (per capita from National Headquarters)	_____
Forget-Me-Not	_____
Bingo	_____
Thrift Store	_____
Lounge	_____
Interest	_____
*Other	_____
TOTAL	<u>0.00</u>
DISBURSEMENTS	
*Salaries	_____
*Conventions	_____
Postage/Office Supplies	_____
*Service/Charitable	_____
Forget-Me-Not	_____
*Bingo	_____
*Thrift Store	_____
*Lounge	_____
*Home	_____
*Other	_____
TOTAL	<u>0.00</u>
ENDING BALANCE <u>0.00</u>	
CASH ASSETS (End of Month)	
Checking Accounts	_____
Savings Accounts	_____
CD's	_____
Investments/Securities	_____
TOTAL CASH ASSETS	<u>0.00</u>

*Requires separate accountability in detail.


 Signature of Treasurer

REV. 12/17

check. All checks must include the signature of at least two officers. There should be no debit or credit cards utilized by a chapter.

He/she shall keep a system of accounts approved by the chapter and shall preserve all receipts and checks or vouchers for payments made. He/she shall render a monthly report (Figure 3) of receipts and expenditures to the chapter no later than the first regular chapter meeting following the last day of each calendar month. This form can be downloaded from the Member Resources section of our website at dav.org/members-resources/all-alpha.

An Annual Financial Report (Figure 4) shall be submitted to the National and Department Headquarters within ninety (90) days after the close of the department/chapter accounting year ending June 30. Chapters having gross income below \$25,000, excluding membership per capita dues, are not required to submit a report to National Headquarters.



Annual Financial Report

Chapter _____ Department of _____

Located at _____ City _____ State _____ Accounting Period from July 1, _____ to June 30, _____

Cash (Liquid Assets) Report

Beginning Balance	\$ _____
	(Total Liquid Assets from line 27 of last year's report)
This Year's Gross Income/Receipts (net values are not permitted):	
1. All Funding from National Headquarters	\$ _____
2. Forget-Me-Not Drive Gross Receipts	_____
3. Bingo Gross Receipts	_____
4. Thrift Store Gross Receipts	_____
5. Bar/Lounge Gross Receipts	_____
6. Interest and Dividend Income, from Checking, Savings and C.D.s only	_____
7. In-kind Donations during Accounting Period (Attach required schedule)	_____
8. Increase in Market Value of Investments on Line 26 during Accounting Period	_____
9. Other Income (Attach required schedule and legal gifting documents for bequests/trusts)	_____
10. Total Income (Sum of Lines 1 thru 9) (Do not include Beginning Balance amount)	\$ _____
*** The report must be reviewed by a certified public accountant if the amount shown on line 10 minus the amounts shown on lines 1 and 7 exceeds \$300,000. ***	
This Year's Expenses/Disbursements (net values are not permitted):	
11. Administrative Personnel Salaries, Benefits, Payroll Taxes and Payroll Processing Fees (Attach required schedule)	\$ _____
12. Conventions/Conferences/Seminars/Meetings (Attach required schedule listing specific events and amounts)	_____
13. Postage and Office Supplies (Administrative and non-service related postage & office supplies)	_____
14. Service Expenses (Complete and attach required Service Expenses Schedule form)	_____
15. Forget-Me-Not Expenses (All costs associated with drive)	_____
16. Bingo Expenses, including bingo salaries & payroll taxes (Attach required schedule)	_____
17. Thrift Store Expenses, including thrift store salaries & payroll taxes (Attach required schedule)	_____
18. Bar/Lounge Expenses, including bar/lounge salaries & payroll taxes (Attach required schedule)	_____
19. Chapter Home/Department HQ Operational Expenses (Attach required schedule)	_____
20. Decrease in Market Value of Investments on Line 26 during Accounting Period	_____
21. Other Expenses (Attach required schedule)	_____
22. Total Expenses (Sum of Lines 11 thru 21)	\$ _____
Ending Balance	\$ _____
	(Beginning Balance plus Line 10 minus Line 22)
Statement of Liquid Assets:	
Liquid assets are those assets which are readily convertible to cash, and do not include real or physical property such as real estate or furniture and fixtures. If applicable, complete and attach Other Assets Schedule form (901332-Rev. 8/21) to this report.	
23. Checking Accounts (Attach copy of bank statement) \$ _____, Cash on Hand \$ _____ =	\$ _____
24. Savings Accounts (Attach copy of bank statement)	_____
25. Certificates of Deposit (Attach copy of bank statement or letter from financial institution verifying value)	_____
26. Market Value of Investments as of End of Accounting Period (Attach copy of investment statement)	_____
27. Total Liquid Assets (Sum of Lines 23 thru 26) (Must equal amount on Ending Balance Line)	\$ _____
Name of Bank(s) and Local Branch Location(s) _____	
Names of Authorized Signers on Bank Account(s) _____	
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> SIGNED by audit committee (three members) <small>(Must not include commander, or vice commander, treasurer, adjutant or finance chairperson)</small> </div> <div style="width: 45%;"> SIGNED & SUBMITTED by department/chapter treasurer </div> </div>	
Audit Committee Member Signature & Membership Number _____ _____ _____ _____ Date _____	Treasurer Signature _____ _____ _____ _____ Date _____
This form is required to be submitted annually by the National Constitution and Bylaws Article 8, Section 8.4, Article 9, Section 9.3 and Article 10, Section 10.1. If gross receipts of chapter, excluding dues per capita, are less than \$25,000, submit report to state department only.	
Email to National Headquarters: AFRinfo@dav.org Send a copy to your DAV state department (see instructions). 901308 (6/23)	

Figure 4

The treasurer must always be aware that the chapter funds must be properly accounted for. Accordingly, the treasurer shall at all times:

1. Ensure the safeguarding of funds, properties and other assets against unauthorized loss or use.
2. Ensure all disbursements of funds are properly approved in accordance with chapter, department and national constitution and bylaws.
3. Ensure all financial transactions are properly and accurately recorded so that the financial data is reliable.

Year-end requirements

At the end of each year, which shall be the membership year commencing July 1 and ending June 30, the treasurer will total all 12 monthly chapter financial reports and prepare the DAV Annual Financial Report (Figure 4). The completion of the appropriate IRS Form 990 must also be filed with the Internal Revenue Service to ensure the chapter retains its tax exemption.

The treasurer must comply with standards established by the National Bylaws and National Executive Committee for audits of chapter establishments, organizations, programs, activities and functions. These standards require chapters to be responsible for providing adequate audit coverage of their programs as an aid in determining whether funds have been applied efficiently, economically, effectively and consistently with program objectives and underlying agreements.

Keeping records

The treasurer shall maintain a file that will contain your monthly bank statements and bank reconciliations for record-keeping purposes.

The treasurer shall also maintain a folder containing all monthly vouchers and invoices paid. Each disbursement should be supported by a voucher or invoice indicating the date paid and check number, as well as the amount paid, if not paid in full.

Bank reconciliation

At the end of each month, the treasurer will prepare a bank reconciliation, as shown in Figure 5.

When reconciling bank statements, the treasurer shall perform the following tasks:

1. Compare the deposits listed on the bank statement with the deposits shown in chapter accounting records. Any deposit in transit should be added to the bank statement. (Any deposits in transit from last month still not listed on the bank statement should be immediately investigated.)
2. Review the bank statement in numerical order and compare entries with the records of checks issued. List any outstanding checks not shown or the bank statement. (Be sure to include any checks still outstanding from last month.) Deduct outstanding checks from the bank balance.



Monthly Bank Reconciliation

Balance per bank (a)		\$ 4,000.00	
(1) Add deposit in transit		200.00	
		<u>4,200.00</u>	
(2) Less outstanding checks			
No. 510	150.00		
No. 56	200.00		
No. 600	650.00		
		1,000.00	
Adjusted cash balance		<u>3,200.00</u>	(b)
Balance per books (a)		3,400.00	
(3) Add			
Interest earned		25.00	
		<u>3,425.00</u>	
Less			
(4a) Non-sufficient funds of Jake Jones	125.00		
(4b) Service charge	10.00		
(5) Overstated deposit	90.00		
		225.00	
Adjusted book balance		<u>3,200.00</u>	(b)

(a) Beginning balance must be for the same day of the month.

(b) These balances must agree.

Figure 5

3. Add to the balance any interest earned, per the chapter books.
4. Deduct from the balance, per chapter books, any debit memoranda issued by the bank, such as non-sufficient fund checks and service charges that are not yet recorded on the chapter books.
5. Adjust for any deposits that were incorrectly recorded in the chapter books.

Note: If returned checks are included with the bank statement, the treasurer should trace the checks to the statement from chapter records, making sure that all checks were issued by the chapter, properly charged to the chapter's account and properly signed.

Chaplain

The chaplain is responsible for leading the opening prayer of the chapter meetings. The chaplain is the spiritual leader of the chapter and may be called upon to represent the chapter at the funeral services for deceased members, send sympathy cards and visit members of the chapter or their family members who are ill.

A primary responsibility of the chaplain is to positively enhance the good of the order. The chaplain must serve all and conduct themselves in a way that respects members of all beliefs. He or she must understand and respect their limitations. For instance, chaplains are not necessarily credentialed crisis counselors and should refer veterans in crisis to the VA Crisis Line, which can be reached by dialing 988 and pressing 1 or by texting 838255.

A chaplain should be a uniting presence who does not proselytize their personal faith or beliefs on topics such as homosexuality, transgenderism or the nonreligious.

Sergeant-at-Arms

The sergeant-at-arms assists the commander in preserving order during chapter meetings. The sergeant-at-arms is responsible for verifying the membership of those in attendance when required to do so by the nature of business (i.e., election of officers or delegates, private matters requiring the protection of personal rights). The sergeant-at-arms may be responsible for handling the physical arrangements of the meeting hall.

Officer of the Day

The officer of the day is responsible for maintaining a list of visitors at chapter meetings and introducing visitors when called upon by the commander. The officer of the day is also responsible for escorting visitors and others to the podium, when directed by the commander.

The participants learn about DAV's mission, history and various programs. In addition, they are instructed in the proper use of appropriate forms and the steps in processing claims, as well as their legal and ethical responsibilities to clients.

Upon successful completion of the training, participants receive certification as a chapter service officer and the certification expires after 18 months if the CSO hasn't attended another certification class held by the national service office. The certification training instruction is a fulfilling learning experience, and the CSOs gain a rewarding experience from their dedication to DAV's mission of service and caring for injured and ill veterans, their dependents and survivors.

Benefits Protection Team Leader

The Benefits Protection Team Leader (BPTL) is responsible for coordinating and overseeing DAV's grassroots efforts, legislative agenda and resolution process at the local level. The BPTL is also responsible for advocating for local issues that are not in conflict with resolutions adopted at the national level or with department policies, at the direction of the department commander.

The BPTL should:

- Sign up for the DAV Commander's Action Network (CAN) at davcan.org.
- Distribute legislative alerts and encourage DAV members, family and friends to take action.
- Develop a local grassroots network made up of DAV members, family and friends. (Visit dav.org/grassroots for information on Building a Network of Networks.)
- Use the network to get the word out on veterans issues.
- Email or provide a printed copy of the Protecting Our Benefits Begins With You brochure to the benefits protection team members in your network.
- Get to know your federal elected officials and their staffs.
- Keep informed about DAV's position on legislation introduced by federal elected officials.
- Notify DAV national legislative staff of developing trends in local issues that affect DAV members.

- Notify DAV national legislative staff in Washington, D.C., of local congressional field hearings (on the federal level) and, if requested to testify, seek their assistance.
- Ensure that resolutions considered by the chapter and department are consistent with DAV's stated mission in DAV Resolution No. 001.
- Help schedule and coordinate congressional meetings for your DAV members coming to Washington, D.C., for the DAV Mid-Winter Conference. Also, encourage members who are unable to attend the conference to contact the local office of their legislators and provide them with a copy of DAV's Key Legislative Goals.

**Join the Commanders Action
Network by visiting**

davcan.org



MyDAV.org

Our members have access to DAV's Customer Relations Management (CRM) tool. You can review and update your DAV profile, manage payments, request a new membership card and more. In addition to other current and future capabilities, DAV officers are also able to generate reports. Visit **MyDAV.org/membershipmembers** to register today!

How to register on MyDAV.org

- Visit **MyDAV.org/login**
- Complete the new user registration form.
- A New User Registration Email will be sent with a thank you for joining and providing your username.
- User information will be processed
- You will receive an email confirming access to the Membership MyDAV.org portal a few days after the "New User Registration Email".
- From that email you can log in to the **MyDAV.org** portal.

Note: Access is based on criteria set up in MyDAV.org that is reflective of your role(s) within DAV.

Questions or assistance with MyDAV.org

- Call: **888-236-8313**.
- Email: **membership@dav.org**.

Download the DAV logo

Consistent branding builds trust and familiarity between DAV and the public. People flock to organizations they recognize the most because they're reassured by that company's legitimacy in their field. To ensure DAV's branding remains consistent, all of our marketing materials should feature the same logo, slogans and general color scheme. It is important to coordinate every facet of DAV's marketing campaign so our visual identity is easily



KEEPING OUR PROMISE TO
AMERICA'S VETERANS



KEEPING OUR PROMISE TO
AMERICA'S VETERANS

recognizable through every communication with the public and our members. Follow the instructions below to download logos to use for your department, chapter or unit.

1. Go to **dav.org/member-resources/dav-logos**.
2. Download the *DAV Brand Stylebook* and *DAV Language Guide*, then check the box indicating that you will comply with the standards.
3. Download the logo(s) that you need from the versions available.

Brand assistance

For additional help, email the national communications department at **production@dav.org**.

Important reminder

The name "Disabled American Veterans," the initials "DAV," our logo or our seal are not to be used in conjunction with any activity to generate funds without the prior approval of the Department Executive Committee and/or the National Executive Committee as outlined in our Bylaws.

DAV NATIONAL HEADQUARTERS

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Erlanger, KY 41018
859-441-7300
Toll Free 877-426-2838

DAV WASHINGTON HEADQUARTERS

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