



Checklist to Keep Your Echelon in Good Standing and Thriving

Keep this list with your echelon’s books and financial records and check it monthly.

THE MUST DO’S

Items that must be sent to National HQ annually to remain in good standing.

1. **Installation Form (AKA The Warrant):**

Description	List of Officers and their contact information , as well as your monthly meeting location/time and the designated address for mailing checks and rosters.
Purpose	Communication! The Membership Department uses your Warrant for all contact needs: who to call about echelon meetings, where to send checks, who is involved with a particular program, who is the best contact person when a veteran wants to learn about your echelon. Departments and Councils use the Warrant for communication and organization purposes, too.
Submitting	Elections are held between January and April. The Installation must occur within 60 days of the election. Therefore, all Installation Forms should be sent between January and June ANNUALLY .
Constitution & ByLaws Reference	<i>Bylaws</i> , Articles VII - IV
Staff Contact	Harrison Heller, Membership Coordinator hheller@jwv.org or 202-448-5411

Download the form: <https://www.jwv.org/wp-content/uploads/Post installation form.pdf>

2. **Financial Board Report (AKA FB Report):**

Description	More or less a financial checklist, the FB Report outlines an echelon’s income, expenses, donations, fundraising and taxes.
Purpose	The FB Report is the primary tool the Finance Board Committee uses to fulfill its purpose - to “supervise the annual accounting, fundraising, depositing and spending of funds; and alienation of other assets.” In other words, to audit the financial status of the organization and ensure its compliance with IRS and Federal laws.
Submitting	The Report is sent to QM/Cmdrs by February. It must be completed and returned to National HQ.
Constitution & ByLaws Reference	<i>ByLaws</i> , Article II, Sections 4 – 5
Staff Contact	Harrison Heller, Membership Coordinator hheller@jwv.org or 202-448-5411

Download the form: <https://www.jwv.org/wp-content/uploads/2020/01/2020-Finance-Board-Report.pdf>



3. 990-N Receipt/Copy of 990 Submission:

Description	Proof that your echelon filed its 990, 990EZ, or 990N for the most recent tax year.
Purpose	As a 501c4 (NOT 501c3), JWV must comply with IRS tax rules to remain a tax-exempt Veteran Service Organization. EVERY echelon must file the tax form 990 annually. Simply put, if we do not file, we lose our status.
Submitting	A copy of the 990N confirmation email or copy of the 990/990EZ paper submission must accompany your completed FB Report.
Constitution & ByLaws Reference	<i>ByLaws</i> , Article II, Sections 4 – 5
Staff Contact	Harrison Heller, Membership Coordinator hheller@jwv.org or 202-448-5411

For more info about Filing your 990, visit: <https://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations-Form-990-N-e-Postcard>

Tutorial Guide: Filing Tax Form 990-N: <https://www.jwv.org/wp-content/uploads/990n-form-user-guide.pdf>

4. Fidelity Bond:

Description	The Fidelity Bond is insurance for your treasury. It is contracted by the Insurance Committee and sold to every echelon on an annual basis. It is both a JWV Constitutional requirement and IRS requirement.
Purpose	The Bond's purpose is to protect and cover the funds collected, held and disbursed by every echelon.
Submitting	A bill is generally mailed in December and payment is due by February. If payment is not received, the amount will be deducted from the echelon's Per Capita Refund Checks.
Constitution & ByLaws Reference	<i>ByLaws</i> , Article VI, Section 9
Staff Contact	Christy Turner, Assistant to National Director & National Commander, cturner@jwv.org or 202-265-6280 x417

5. Proof of Liability Insurance:

Description	The Insurance Committee recommends that every echelon insure itself for accidents and damages.
Purpose	Liability insurance helps your echelon stand strong through challenging situations such as accidents, injuries or damages.
Submitting	Proof of insurance should be supplied with annual FB Report.
Constitution & ByLaws Reference	<i>ByLaws</i> , Article VI, Section 9
Staff Contact	Christy Turner, Assistant to National Director & National Commander, cturner@jwv.org or 202-265-6280 x417



THE SHOULD-DO'S

Items that should be sent to National HQ to keep your echelon thriving.

6. Dues Structure Update:

Description	Update the amount your echelon is refunded per member for the next member year. (e.g. a member's \$50 annual dues yields \$35 for National, \$5 for the Department, and \$10 for the Post)
Purpose	Membership dues are divided between National, Departments, Councils (if applicable), and Posts. If an echelon wishes to change its portion of the dues, it must complete the Dues Structure Update BEFORE National HQ's fiscal year begins on July 1.
Submitting	The form is sent to Cmdr/QMs between April and June, to be completed by July. All dues for the next fiscal year are set and final as of July 1.
Constitution & ByLaws Reference	<i>ByLaws</i> , Article II, Section 1 – 2
Staff Contact	Harrison Heller, Membership Coordinator hheller@jwv.org or 202-448-5411

7. Roster Updates:

Description	Send roster updates and changes to the Membership Department. Common changes include: <ul style="list-style-type: none"> ○ Address, phone number and email updates ○ Deaths ○ Transfers ○ Post contact information
Purpose	Unless a member or member's family reports changes to National HQ, National will not know of membership changes. To keep accurate records and to avoid unnecessary spending on postage, HQ relies on echelons to send member updates.
Submitting	Send updates as needed, at least twice per year.
Constitution & ByLaws Reference	<i>Constitution</i> , Article IV, Sec. 1
Staff Contact	Send updates via mail, email or fax, Attn: Membership Department: 1811 R St NW, Washington, DC 20009 hheller@jwv.org Fax: (202) 234-5662

Note, you should also send roster updates to your Department Quartermaster, especially if the Department sends regular mailings.



8. Delegate Form:

Description	Delegates represent a Post at the Annual National Convention. Each Post receives one delegate per 10 members. The Delegate Form indicates how many delegates the Post is eligible to send.
Purpose	To identify who from your Post will represent the Post at the National Convention.
Submitting	National HQ sends the Form to Post Cmdrs in May/June. The Post must return the Form at least 15 days before National Convention.
Constitution & ByLaws Reference	<i>Constitution</i> , Article V, Sec. 4
Staff Contact	Send via mail, email or fax, Attn: Membership Department to: 1811 R St NW, Washington, DC 20009 membership@jwv.org Fax: (202) 234-5662

EXPLORE

Learn more about managing a Post:

- **Chartering and naming a Post:** *Constitution*, Article X, Sections 1 – 2
- **Opening a Post:** *ByLaws*, Article IX, Sections 1 – 2
- **Understanding Membership:** *Constitution*, Article IV; *ByLaws*, Article I
- **Understanding Patron Donors:** *Manual of Ceremonies*, Part III, p. 36
- **Elections, Officers, Officer Duties:** *ByLaws*, Article IX, Sections 5 – 10, 12; *Manual of Ceremonies*, Part III
- **Conducting meetings:** *ByLaws*, Article IX, Section 11; *Manual of Ceremonies*, Part I
- **Setting Post rules and Constitution:** *ByLaws*, Article IX, Section 12
- **Merging or Dissolving a Post:** *ByLaws*, Article IX, Sections 3, 4, 14
- **A down-to-earth guide for running a Post and understanding JWV programs:** *JWV Program Guide*
- **Recruiting Members:** <https://www.jwv.org/membership/for-members/recruitment/>

All guides are available for free download at www.jwv.org:

- *The Constitution and ByLaws:* <https://www.jwv.org/wp-content/uploads/2019/09/Constitution-and-Bylaws-for-web-August-2019.pdf>
- *The Manual of Ceremonies:* <https://www.jwv.org/wp-content/uploads/2020/01/Manual-of-Ceremonies-for-Web-2020.pdf>
- *The Program Guide:* <https://www.jwv.org/membership/for-members/program-guide/>

Purchase a bound copy of all three guides through National HQ:

Contact Communications Coordinator Iryna Apple at (202) 265-6280 x103 or iapple@jwv.org to order today. Large-print editions are available.