



## 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 your Department Commander and National HQ annually to remain in good standing.**

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

<b>Description</b>	List of Officers and their <b>contact information</b> , as well as your monthly meeting location/time and the designated address for mailing checks and rosters.
<b>Purpose</b>	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.
<b>Submitting</b>	Elections are held between January and April. The Installation must occur within 60 days of the election. Therefore, all <b>Installation Forms should be sent to both your Department Commander and <a href="mailto:membership@jwv.org">membership@jwv.org</a> by June 15<sup>th</sup> ANNUALLY.</b>
<b>Constitution &amp; ByLaws Reference</b>	<a href="#">Bylaws, Articles IX, Section - VI</a>
<b>Staff Contact</b>	Melody Harrison, Membership Director <a href="mailto:membership@jwv.org">membership@jwv.org</a> or 202-448-5411

Download the form: <https://www.jwv.org/membership/for-members/post-management/>

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

<b>Description</b>	More or less a financial checklist, the FB Report outlines an echelon's income, expenses, donations, fundraising and taxes.
<b>Purpose</b>	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.
<b>Submitting</b>	The Report is sent to QM/Cmdrs by February. It must be completed and returned to both your <b>Department Commander and National HQ at <a href="mailto:membership@jwv.org">membership@jwv.org</a> no later than March 15.</b>
<b>Constitution &amp; ByLaws Reference</b>	<a href="#">ByLaws, Article II, Sections 4 - 5</a>
<b>Staff Contact</b>	Melody Harrison, Membership Director <a href="mailto:membership@jwv.org">membership@jwv.org</a> or 202-448-5411

Download the form (scroll to Financial Administration): <https://www.jwv.org/membership/for-members/post-management/>



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

<b>Description</b>	Proof that your echelon filed its 990, 990EZ, or 990N for the most recent tax year.
<b>Purpose</b>	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.
<b>Submitting</b>	A copy of the 990N confirmation email or copy of the 990/990EZ paper submission must accompany your completed FB Report and must be <b>sent to both your Department Commander and <a href="mailto:membership@jwv.org">membership@jwv.org</a> no later than March 15.</b>
<b>Constitution &amp; ByLaws Reference</b>	<i>ByLaws</i> , Article II, Sections 4 – 5
<b>Staff Contact</b>	Melody Harrison, Membership Director <a href="mailto:membership@jwv.org">membership@jwv.org</a> 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:

<b>Description</b>	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.
<b>Purpose</b>	The Bond's purpose is to protect and cover the funds collected, held and disbursed by every echelon.
<b>Submitting</b>	A bill is generally mailed in October and <b>payment is due by November 15</b> . If payment is not received, the amount will be deducted from the echelon's Per Capita Refund Checks.
<b>Constitution &amp; ByLaws Reference</b>	<a href="#"><i>ByLaws</i>, Article XIV</a>
<b>Staff Contact</b>	Administrative Assistant /Office Manager, <a href="mailto:insurance@jwv.org">insurance@jwv.org</a> or 202-265-6280 x417



## 5. Proof of Liability Insurance:

<b>Description</b>	The Insurance Committee recommends that every echelon insure itself for accidents and damages.
<b>Purpose</b>	Liability insurance helps your echelon stand strong through challenging situations such as accidents, injuries or damages.
<b>Submitting</b>	A bill is generally mailed in October and <b>proof of insurance is due by November 15.</b>
<b>Constitution &amp; ByLaws Reference</b>	<a href="#">ByLaws, Article XIV</a>
<b>Staff Contact</b>	Administrative Assistant/Office Manager, <a href="mailto:insurance@jwv.org">insurance@jwv.org</a> 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:**

<b>Description</b>	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)
<b>Purpose</b>	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.
<b>Submitting</b>	The form is sent to CMDR/QMs between April and June, to be completed by July. <b>All dues for the next fiscal year are set and final as of July 1.</b>
<b>Constitution &amp; ByLaws Reference</b>	<a href="#">ByLaws, Article II, Section 1 – 2</a>
<b>Staff Contact</b>	Melody Harrison, Membership Director <a href="mailto:membership@jwv.org">membership@jwv.org</a> or 202-448-5411

**7. Roster Updates:**

<b>Description</b>	Send roster updates and changes to the Membership Department. Common changes include: <ul style="list-style-type: none"> <li>○ Address, phone number and email updates</li> <li>○ Deaths</li> <li>○ Transfers</li> <li>○ Post contact information</li> </ul>
<b>Purpose</b>	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.
<b>Submitting</b>	Send updates as needed, at least twice per year.
<b>Constitution &amp; ByLaws Reference</b>	<i>Constitution</i> , Article IV, Sec. 1
<b>Staff Contact</b>	Send updates via email or mail, Attn: Membership Department: <b>1811 R St NW, Washington, DC 20009</b> <a href="mailto:membership@jwv.org">membership@jwv.org</a>

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



8. Delegate Form:

<b>Description</b>	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.
<b>Purpose</b>	To identify who from your Post will represent the Post at the National Convention.
<b>Submitting</b>	National HQ sends the Form to Post Cmdrs in May/June. The Post must return the Form at least 15 days before National Convention.
<b>Constitution &amp; ByLaws Reference</b>	<a href="#">Constitution, Article VI</a>
<b>Staff Contact</b>	Send via mail or email, Attn: Membership Department to: <b>1811 R St NW, Washington, DC 20009</b> or <a href="mailto:mmembership@jwv.org">mailto:mmembership@jwv.org</a>

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](http://www.jwv.org):

- *The Constitution and ByLaws:* <https://www.jwv.org/wp-content/uploads/2023/09/2023-Constitution-Bylaws-web.pdf>
- *The Manual of Ceremonies:* <https://www.jwv.org/wp-content/uploads/2022/04/Manual-of-Ceremonies-large-print-January-2022.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 Director Iryna Apple at (202) 265-6280 x103 or <mailto:iapple@jwv.org> to order today.