



## Checklist to Keep Your Department in Good Standing and Thriving

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

### THE MUST DO's For Departments

***The Items listed below must be sent to the National Membership Director ANNUALLY in the period indicated to be in Good Standing. If your Department is determined not to be in Good Standing by the National Credentials & Registration Committee, your Department Officers (Elected/Appointed – DC, NEC members will not be recognized or be allowed to vote in any election or meeting. Your Policy, C&B, and Resolution Committee members shall not be recognized and shall not participate in those committee meetings.***

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

<b>Description</b>	List all the Elected and Appointed officers and their contact information, as well as your monthly meeting location/time. <b>Failure to submit an annual <a href="#">Department Installation Form</a> will result in National withholding any dues remittances to the Department.</b> Membership rosters will be sent to the Department Commander (DC); Department Junior Vice Commander (DJVC) for membership purposes (membership renewal notification and member data verification); and the Department Quartermaster (DQM) for dues remittances purposes.
<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 <a href="#">Installation Forms</a> should be sent to the National Membership Director at <a href="mailto:membership@jwv.org">membership@jwv.org</a> by June 15 <sup>th</sup> ANNUALLY.
<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 202-265-6280

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.



# Jewish War Veterans of the United States of America

www.jwv.org | membership@jwv.org

Membership Matters

<b>Submitting</b>	The <a href="#">Finance Board Report</a> must be completed and returned to <b>National HQ at <a href="mailto:membership@jwv.org">membership@jwv.org</a> no later than March 14.</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 202-265-6280

**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 sent to National HQ at <a href="mailto:membership@jwv.org">membership@jwv.org</a> <b>no later than March 14.</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 202-265-6280

**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="#">ByLaws, Article XIV</a>
<b>Staff Contact</b>	Melody Harrison <a href="mailto:membership@jwv.org">membership@jwv.org</a> or 202-265-6280



**THE SHOULD-DO's**

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

**5. 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 will be emailed to CMDRS and QMs in April. This form shall be submitted to National Membership no later than June 30. <b>All dues for the next fiscal year are set and final as of June 30.</b> For more information about the Dues Structure visit: <a href="#">Understanding-the-JWV-Dues-Structure-1062021.pdf</a> .
<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

**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/2024/11/Constitution-and-Bylaws-September-2024-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/>