



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 For Posts

Items that must be sent to your Department Staff (DC, DSVC, and DQM) and National HQ ANNUALLY to remain in good standing. If you are determined not to be in Good Standing your Post shall not be allowed to vote in any election of National Officers.

Items that must be sent to your Department Commander and National HQ annually to remain in good standing.

1. Installation Form (AKA The Warrant):
2. Financial Board Report (AKA FB Report):
3. 990-N Receipt/Copy of 990 Submission:
4. Fidelity Bond:
5. Proof of Liability Insurance:

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

Description	List all the Elected and Appointed Officers and their contact information, as well as your monthly meeting location/time. Failure to submit an annual Installation Form will result in National withholding any dues remittances to the Post. Membership rosters will be sent to the Post Commander (PC); Post Junior Vice Commander (PJVC) for membership purposes (membership renewal notification and member data verification); and the Post Quartermaster (PQM) for dues remittances purposes.
Purpose	Communication! The Membership Director uses your Installation Form for all contact needs: who to direct a new member to for information on meeting location and time or general information on your Post; where to send rosters and remittance checks. Departments use the Installation Form for communication and organization purposes.
Submitting	All Posts will conduct elections which are to be held between January 1 and April 30th. The Installation must occur within 60 days of the election. Therefore, all Installation Forms must be sent to both your Department Commander <i>and</i> membership@jvw.org no later than June 15 th ANNUALLY . Use the current on-line fillable form.
Constitution & Bylaws Reference	Bylaws, Articles IX, Section - VI
Staff Contact	Membership Director membership@jvw.org

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



2. Financial Board Report (AKA FB Report):

Description	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 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 echelon and ensure its compliance with IRS and Federal laws.
Submitting	The Report is sent to PC and PQM by February. It must be completed and returned to both your Department Commander <i>and</i> National HQ at membership@jwv.org no later than March 16.
Constitution & Bylaws Reference	Bylaws, Article II, Sections 4 – 5
Staff Contact	Membership Director membership@jwv.org

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

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 (VSO). 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 and must be sent to both your Department Commander <i>and</i> membership@jwv.org no later than March 16.
Constitution & Bylaws Reference	Bylaws, Article II, Sections 4-5 . To include “Submitting an Annual Financial Report”: Government Relations: Procedures of The JWV National Finance Board.
Staff Contact	Membership Director membership@jwv.org . Download the form (scroll to Financial Administration):

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	Proof of insurance is due by November 15. Email proof of Liability Insurance to membership@jwv.org .
Constitution & Bylaws Reference	Bylaws, Article XIV , Section 1a.
Staff Contact	Membership Director membership@jwv.org

5. Proof of Liability Insurance:

Description	The Insurance Committee <i>recommends</i> that every echelon insure itself for accidents and damages.
Purpose	Liability insurance helps your echelon cover the costs associated with member accidents, injuries or damages.
Submitting	Proof of insurance is due by November 15. Email proof of Liability Insurance to membership@jwv.org .
Constitution & Bylaws Reference	Bylaws, Article XIV
Staff Contact	Membership Director membership@jwv.org



THE SHOULD DO's For Posts

6. Dues Structure Update:

Description	Update the amount your echelon is refunded per member for the next member year.
Purpose	Membership dues are divided between National, Departments, and Posts. If a Post 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 will be emailed to CMDRS and QMs in April. This form shall be submitted to National Membership no later than June 30. All dues for the next fiscal year are set and final as of June 30. For more information about the Dues Structure visit: Understanding-the-JWV-Dues-Structure-1062021.pdf .
Constitution & Bylaws Reference	Bylaws, Article II, Section 1 – 2
Staff Contact	Membership Director membership@jwv.org

7. Roster Updates:

Description	It is critical that updates and changes to the member data be sent to National Membership as you are notified. Common changes include: <ul style="list-style-type: none"> ○ Address, phone number (Preferred Cell or home) and email address corrections ○ Change/correction of Membership Category (example: "Active" to "Active Life" membership) ○ Deaths -submit a "TAPS" form ○ Transfers-submit a "Post Dual Membership/Transfer" form ○ Member in more than one Post (submit a "Dual Membership/Transfer form").Primary and Secondary Post MUST be identified.
Purpose	It is the duty and responsibility of the Post Officers (particularly the PJVC (Membership) and the PQM to send timely and accurate updates on their members to the National Membership Director. They will make a reasonable effort to contact the member by email; phone; or personal visit to the members' residential address as listed on the membership roster to ascertain whether the member is alive, and that contact data is correct. Failure to locate the member or upon verification that the member is deceased appropriate forms/notification will be provided to the National Membership Director.
Submitting	Send updates as needed, at least twice per year.
Constitution & Bylaws Reference	<i>Constitution, Article IV, Sec. 1</i>



Staff Contact	Send updates via email or mail, Attn: Membership Department: 1811 R St NW, Washington, DC 20009 membership@jwv.org
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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 the Post Delegate(s). If more than one delegate, then the total votes each delegate may vote shall be annotated. Do not elect more delegates than you have votes for, i.e., 5 votes then 1-5 delegates. Votes will not be split, i.e., 5 votes, 2 delegates Delegate "A" 2 votes, Delegate "B" 3 votes.
Purpose	To identify who from your Post cast votes for the Post at the National Convention.
Submitting	The form is posted on the website. The Post staff will submit the form to National Membership no later than the end of May.
Constitution & Bylaws Reference	Constitution & Bylaws Reference Constitution, Article VI
Staff Contact	Send via mail or email, Attn: Membership Department to: 1811 R St NW, Washington, DC 20009 or membership@jwv.org

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](#)
- [The Manual of Ceremonies](#)
- [The Program Guide](#)