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.

Additional information can be accessed online at davmembers.org. Page 16 offers instructions on accessing this site.

We believe this guide will assist our chapter officers in doing a better job conducting DAV business and fulfilling our mission of service to ill and injured veterans and their families. As DAV leaders excel at the local level, the organization, veterans and their families will reap the rewards.

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,

J. MARC BURGESS
National Adjutant
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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 in
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 Chapter Officer Report 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. A copy should be sent to National and Department Headquarters, as well as the National Service Office.

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.

Order your official DAV membership protection forms at www.DAV.org.

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**Figure 1**

Officer Election Report

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Mailing Address</th>
<th>City/State/ZIP</th>
<th>Phone</th>
<th>Email</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commander</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sr. Vice Commander</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Jr. Vice Commander</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjutant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Treasurer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefits Protection Team Leader</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Chairman</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Judge Advocate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Officer Authorized to Receive Mail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** For Service Officer recommendations, use the Service Officer Nominations form and follow the submission instructions on that form. In compliance with Art. 8, Sec. 8.1, Art. 9, Sec. 9.2 and Art. 10, Sec. 10.1, of the DAV National Bylaws.
The following are some of the membership transactions that will appear from time to time on the report shown in Figure 2.

<table>
<thead>
<tr>
<th>Transfer Out</th>
<th>New Life</th>
<th>Unclaimed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer In</td>
<td>Full Paid Life</td>
<td>Deceased</td>
</tr>
<tr>
<td>Change of Address</td>
<td>Restore</td>
<td>Canceled</td>
</tr>
</tbody>
</table>

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 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 membership website.

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. Departments/chapters having gross incomes below $10,000, excluding membership per capita, are no longer required to submit a report to National Headquarters.
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 on the bank statement. (Be sure to include
any checks still outstanding from last month.)
Deduct outstanding checks from the bank balance.

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.

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<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance per bank (a)</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>(1) Add deposit in transit</td>
<td>200.00</td>
</tr>
<tr>
<td>(2) Less outstanding checks</td>
<td></td>
</tr>
<tr>
<td>No. 51</td>
<td>180.00</td>
</tr>
<tr>
<td>No. 56</td>
<td>203.00</td>
</tr>
<tr>
<td>No. 600</td>
<td>650.00</td>
</tr>
<tr>
<td>Adjusted cash balance</td>
<td>3,200.00</td>
</tr>
<tr>
<td>Balance per books (b)</td>
<td>3,400.00</td>
</tr>
<tr>
<td>(3) Add</td>
<td></td>
</tr>
<tr>
<td>Interest earned</td>
<td>25.00</td>
</tr>
<tr>
<td>Loss</td>
<td></td>
</tr>
<tr>
<td>(4a) Non-sufficient funds of FALSE</td>
<td>125.00</td>
</tr>
<tr>
<td>(4b) Service charge</td>
<td>10.00</td>
</tr>
<tr>
<td>(5) Overstated deposit</td>
<td>9.00</td>
</tr>
<tr>
<td>Adjusted book balance</td>
<td>3,225.00</td>
</tr>
</tbody>
</table>

(a) Beginning balance must be for the same day of the month
(b) These balances must agree.

Figure 5
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.

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.
CHAPTER MEETING AGENDA

ORDER OF BUSINESS
1. Opening ceremony
2. Roll call of officers
3. Introduction of visitors
4. Reading of last meeting’s minutes
5. Treasurer’s report
6. Bills against the Chapter
7. Sickness and distress
8. Applications for membership transfers (and action thereon)
9. Introduction of new members
10. Reading of communications
11. Committee reports
12. Unfinished business
13. New business
14. Good of the order
15. Memorial ceremony
16. Adjournment, with closing ceremonies

OPENING PRAYER
“God, be merciful unto us, and bless us. Cause Thy face to shine upon us that Thy way may be known upon earth, and Thy saving strength among all people. Let the people be glad and sing for joy, for Thou shalt judge them righteously, and govern the nations upon Earth. Especially do we pray that we may have Thy guidance to the end that we may each of us firmly uphold the great principles of this organization. Amen.”

MEMORIAL CEREMONY

COMMANDER:
“At this time, one minute of silence will be devoted in honor of our departed Comrades.

Comrades, you will rise and stand at attention.”
(Raps gavel three times.)

“By the numbers, hand SALUTE!”
(DAV caps are not removed.)

“May they rest in peace. TWO!”
(Raps gavel once, to seat assembly)

CLOSING PRAYER
“May the peace of God, which passeth all understand- ing, keep our hearts and minds in knowledge and love of God, and now unto the Eternal and All-Wise Creator of the Universe, and Preserver of our nation, be honor and glory forever and ever. Amen.”
In everything we do, DAV has one goal—provide all injured and ill veterans and their dependents the best service and most professional claims representation available from any source. Keeping this in mind, it is imperative for us to reach out to those who need our assistance. Chapter service officers (CSOs) are an integral part of this goal, as specifically outlined in Goal 1 of our Strategic Plan.

Any DAV member is eligible for certification when recommended by the appropriate chapter. The Service Officer Nomination Form (Figure 6) must be used by chapters to nominate members to attend. DAV has a required training program for CSOs, which is designed to enhance the knowledge and professionalism of the CSOs and help us provide the best service possible to our clients. The training consists of classroom instruction by a national service officer.

<table>
<thead>
<tr>
<th>Nominee #1</th>
<th>Nominee #2</th>
<th>Nominee #3</th>
<th>Nominee #4</th>
<th>Nominee #5</th>
<th>Nominee #6</th>
<th>Nominee #7</th>
<th>Nominee #8</th>
<th>Nominee #9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
<td>Mailing Address</td>
</tr>
<tr>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
<td>City/State/ZIP</td>
</tr>
<tr>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
<td>Phone/Email/Fax</td>
</tr>
</tbody>
</table>

The Preceding Names and Positions Are Hereby Certified By:
Commander: [Name] Date: [Date]
Adjutant: [Name] Date: [Date]

NOTE: MEMBERS CANNOT CONDUCT SERVICE WORK PRIOR TO COMPLETING DEPARTMENT/CHAPTER SERVICE OFFICER TRAINING AND BECOMING CERTIFIED.

Do not return this form to DAV National Headquarters. Mail to your local national service office coordinating the certification training.

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**Multiple nominations are not necessary.**
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
MEMBER LOGIN
To access the Membership System, go to the website davmembers.org. When the login screen displays, type in your membership number and password. For new members, the default password is your birthdate (MM/DD/YYYY). Once you enter your birthdate, you will be prompted to change your password.

CHANGE PASSWORD
You will be routed automatically to this screen the first time you log in so you can change your default password. You may also access this screen from the “Maintain Information” menu if you decide to change your password again.

To change your password, type your current and new passwords in the required fields and press “Submit.” Note: Passwords must be at least six characters long and can contain letters and numbers but not special characters. Passwords are case-sensitive.

WELCOME
Once you have successfully logged in, the welcome screen will be displayed. On the left, in the blue area, you will be able to access additional menu items.

The menu items will allow you to navigate through the system. You may also download the “User Manual” for complete instructions and views of sample reports.

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 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. Log onto dav.org/membership/members.
2. Enter your DAV or Auxiliary membership number.
3. Click on the link for DAV Logos.
4. Download the DAV Brand Stylebook and DAV Language Guide, then check the box indicating that you will comply with the standards.
5. Download the logo(s) that you need from the versions available.

BRAND ASSISTANCE
For additional help, email the national communications department at feedback@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.