

# STRENGTHENING OUR ORGANIZATION DURING COVID-19

## AMVETS LADIES AUXILIARY DEPARTMENT OF FL LOCAL OFFICER'S TRAINING MATERIAL

October, 2020



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**By PNP/PDP Charlene D. Kee, Training Chair**

What a year! COVID-19 changed the way we work and think on just about everything. I don't think any of us ever imagined we'd be in the midst of a Global Pandemic and the many challenges that it would bring. This year we are unable to meet due to CDC Guidelines of this pandemic. But, we can't stop supporting our organization because we are unstoppable leaders.

I would like to thank PDP Karen Powers, Gaviliers President for appointing me to chair the local officers training and for the following PDP's for assisting, Karen Powers, Sherry Marecek and Donnajeanne Hakler. We hope the material we have prepared will assist you in strengthening your local auxiliary during this pandemic.

We, as members of the AMVETS Ladies Auxiliary, shall be govern by one Constitution on all levels. National, Departments, Districts and Local Auxiliaries shall have their own Bylaws to govern their membership.

You may purchase a copy of the Department Bylaws, National Bylaws, and National Constitution from the Department Quartermaster. The Quartermaster contact information can be found on the website: [www.amvetsauxfl.org](http://www.amvetsauxfl.org). You can also order the National Bylaws,

National Constitution and Auxiliary Manual through the AMVETS Ladies Auxiliary National Headquarters website: amvetsaux.org, listed under forms, Quartermaster Item order.

Every Auxiliary should have a copy of their current bylaws. If not, contact the Department Parliamentarian for a copy. I will email you a copy.

The Parliamentarian can be an appointed or elected. It would be to your best interest to appoint/elect a Parliamentarian to work closely with the President and advises the President when asked.

A Parliamentarian is a consultant who advises the presiding officer and other officers, committees, and members on matters of parliamentary procedure. The Parliamentarian is the chair of the bylaws committee. The bylaws committee job is to ensure that the bylaws are in good standing at all times.

Whenever you have questions regarding the auxiliary, first read your local bylaws. If you cannot find the answer contact the Department President or Department Parliamentarian.

Auxiliary officers may find your duties listed in your local bylaws, department bylaws, national constitution, and the auxiliary manual. The Department Officers are always available to assist you at any time by telephone, email, or you can schedule a meeting at the Department Meetings.



***Listed below are answers to some questions that are often asked:***

There are three (3) forms of membership:

- Annual
- Life
- Member at Large

Honorary Membership is NOT a form of membership. Honorary members are not eligible for regular membership. Honorary members do not have a vote but can be appointed to a position. They cannot be appointed to the offices of President, 1<sup>st</sup> Vice President, 2<sup>nd</sup> Vice President, 3<sup>rd</sup> Vice President or Treasurer.

Local nominations shall take place in April and/or May; elections shall be held at Annual Meeting in May; oath of office prior to June 1.

Any member or guest can attend the AMVETS Ladies Auxiliary Department Meetings provided that they pay their registration.

In the event the office of President is vacated, and the 1<sup>st</sup> Vice President, 2<sup>nd</sup> Vice President and 3<sup>rd</sup> Vice President refuse to assume the office, the highest-ranking officer may call a special meeting or at the next general membership meeting for nominations and election to fill the office of President.

Auxiliary installation shall not be done by an AMVET or Sons of AMVETS.

The SEC Woman shall distribute any information to the respective officers from mail or department meetings.

All auxiliary members should stay out of AMVETS business.

Anything that happens in the canteen is an AMVETS issue.

Existing auxiliaries shall submit revised bylaws no later than thirty (30) days before the Department Convention. Bylaws shall be studied for revision every three (3) years. Auxiliaries shall submit their bylaws and any amendments, typed in triplicate, to the Department Parliamentarian for approval before becoming effective. Bylaws that are updated to conform to Department/National Bylaw changes need not be submitted for approval.

When a local auxiliary submits bylaws or amendments to the Department Parliamentarian for approval, one (1) copy of the minutes shall include the amendments. A separate sheet of the amendments indicating where the membership voted to adopt or a copy of the bylaws highlighted where changed, will be acceptable. Also, three (3) signed copies of the bylaws signed and dated by the President and Parliamentarian (if appointed) must be submitted to the Department Parliamentarian.

***Suggestions when reviewing bylaws:***

In the absence of the President, the 1<sup>st</sup> Vice President shall chair the meeting, then the 2<sup>nd</sup> Vice President and then the 3<sup>rd</sup> Vice President. Should the occasion arise when all four are absent, the Parliamentarian will be the presiding officer at meetings or functions.

Annual dues of this Auxiliary shall be \_\_\_\_\_, of which \$24.00 shall be sent to AMVETS Ladies Auxiliary Department of FL. The amount of \_\_\_\_\_ shall be retained in the local treasury.

Life membership dues of this Auxiliary shall be \_\_\_\_\_, of which \$350.00 shall be sent to AMVETS Ladies Auxiliary Department of FL. The amount of \_\_\_\_\_ shall be retained in the local treasury.

## Local Bylaws Procedures

The local bylaws can be reviewed at any time. The bylaws committee must meet for the following purpose: The 3 year review or changes that are needed before reviewed deadline

A committee must meet chaired by the Parliamentarian with an uneven number of members. Example: The parliamentarian and 3, 5 or etc. members.

The Bylaws Committee shall discuss the recommendation(s) from the members from a meeting or suggestions the committee may have and the parliamentarian gives a report of the recommendations for the members to vote on for approval.

### ***The process of the local bylaws:***

#### **Local Members**

The bylaws must be read at one meeting and read again and voted on at the next meeting



The bylaws are copied into (3) sets  
(The President and Parliamentarian must date and sign all copies)  
(1) copy of the minutes which includes the approval of the bylaws  
must be sent with copies of the bylaws.



Mail to the Department Parliamentarian (Please do not request signature when mailing bylaws)



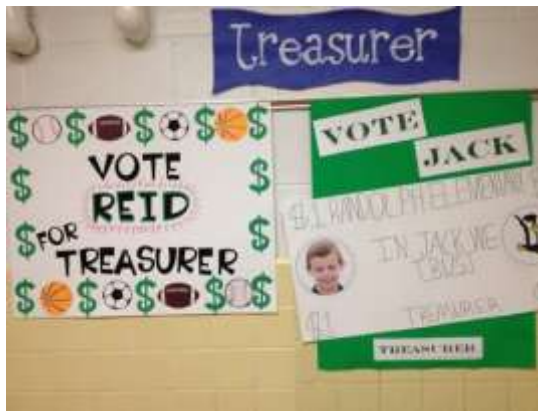
Once the Parliamentarian receives the bylaws she shall review the documents. Afterwards, she will date and sign the bylaws and mail to the Department President for her approval.



The Department President will review and sign the bylaws and mail (1) copy of the bylaws to local auxiliary contact person and (1) copy to the Parliamentarian.

**Please note that the bylaws are not approved until you received them from the Department President with both signatures of the Department President and Parliamentarian.**

**Standing Rules can be changed at any meeting but cannot conflict with your bylaws. Please do not send copies of your Standing Rules to Department.**



## Auxiliary Finances

By PDP Karen Powers

### What makes a good Treasurer?

- The Treasurer should have a good working knowledge of the AMVETS Ladies Auxiliary and its policies and procedures.
- She should be able & willing to devote time to the position to carry out her duties.
- One that is prompt and timely in carrying out her duties.
- One that has the ability to take a quick, brief not of motions concerning finances (checks to be written, monies to be transferred, bills to be paid, etc.)
- Have good math skills
- Have understanding of sound financial business procedures & financial reporting techniques.
- Have the ability to interpret & project the financial position of the local Auxiliary.
- Have an understanding of current policies of the banking institution with which the local Auxiliary does business.



## Treasurer Duties of Office

**The Treasurer** is the officer who is in charge of the receipts, care, and disbursement of money. She should be capable of sound financial judgment and be the Watchdog of the organization's treasury.

The Treasurer should:

- (a) Make sure that accurate financial records are kept and maintained on file.
  - Give complete financial reports at all meetings or upon request.
  - Check to see that your President, Secretary a& Treasurer are bonded
  - **File IRS Form 990**, it is required by IRS regulations, annually at the close of the fiscal year, with copies forwarded to Department HQ immediately. (Your fiscal year according to Dept By-Laws is June 1-May 31<sup>st</sup>, which means **990's are due to be filed on June 1 and to Dept HQ no later than September 15<sup>th</sup> or your local will not be in good standing**)
  - See that an annual audit is conducted.
  - Establish an annual budget to guide the Auxiliary's expenditures and to indicate what funds are needed in order to operate.
  - Make checks to Department Headquarters payable to: AMVETS Ladies Auxiliary, Dept. of Florida.
  - Issue no checks without proper authorization.
  - Make sure the **Department/Auxiliary procedure for the issuing of checks REQUIRE TWO (2) SIGNATURES**
  - Receive all the Auxiliary's income and keep proper records of such income. Deposit all funds in a timely manner.
  - Never pay expenses out of the receipts from projects. Make sure all funds are turned in to Treasurer; pay vouchers for expenses by Auxiliary check. Check should be written to expenses occurred.
  - Establish a systematic plan for collection of funds from officers, chairmen, committees or members, best to do at General Membership in front of membership. Keep transparent.
  - Obtain bank signature cards and execute same for proper signatures on checks.

Remember, these are not the personal funds of the Treasurer. All money belongs to the Auxiliary and should be handled as such. All expenses should be with the approval of the membership prior to checks being written.

Motion was made and passed that the Local Auxiliaries and Department Auxiliaries do not have to send a copy of tax-exempt organizations filing for the 990, 990-EZ, or e Postcard to National. (Nat'l Convention 2019)

**BUT, everyone must file!!!**

- All Local Auxiliaries
- All Departments Auxiliaries
- Exempt organizations are required to file annual returns
- If an organization does not file a required return or files late, the IRS may assess penalties

### **Missed filings**

- Tax form is due every year by the 15th of the 5th month after the close of your tax year
- If an organization does not file as required for three consecutive years, it automatically loses its tax-exempt status
- Revocation of the organization's tax-exempt status will happen on the filing due date of the third consecutively-missed year.

### **Local Revalidation Form**

- \*BLOCK #2 "Most small tax-exempt organizations whose annual gross receipts are normally \$50,000 or less (\$25,000 for tax years ending after December 31, 2007 and before December 31, 2010) are required to electronically submit Form 990-N, also known as thee-Postcard, unless they choose to file a complete Form 990 or Form 990-EZ instead." (This is taken directly from the [irs.gov\leo990n](http://irs.gov/leo990n)) This is to certify that our Fiscal Year ends \_\_\_\_\_ and the Internal Revenue Form 990, Form 990-EZ or Form 990-N (e-postcard) has been submitted to the **Director of Internal Revenue and a copy sent to Department Headquarters**. Federal ID# income is over \$50,000, you MUST attach copy of the 990 (a CPA is recommended) and submit to Department Headquarters. If gross income is less than \$50,000, you MUST file with the IRS Form 990-N (e-postcard), Form 990 or Form 990-EZ and attach a copy of thee-postcard or 990 to this form and submit to Department Headquarters if required. If the Federal ID # is NOT provided, the Local Auxiliary will NOT be revalidated.
- Certified by and signed of Local President and Local Secretary
  - This is a legal document **Department Revalidation Form**
- \*BLOCK #2 "Most small tax-exempt organizations whose annual gross receipts are normally \$50,000 or less (\$25,000 for tax years ending after December 31, 2007 and before December 31, 2010) are required to electronically submit Form 990-N, also known as thee-Postcard, unless they choose to file a complete Form 990 or Form 990-EZ instead." (This is taken directly from the [irs.gov\leo990n](http://irs.gov/leo990n)) This is to certify that our Fiscal Year ends \_\_\_\_\_ **and the Internal Revenue Form 990, Form 990-EZ or Form 990-N (e-postcard) has been submitted to the Director of Internal Revenue**. Federal ID# \_\_\_\_\_ income is over \$50,000, you MUST attach copy of the 990 (a CPA is recommended) and submit to Department Headquarters. If gross income is less than \$50,000, you MUST file with the IRS Form 990-N (e-postcard), Form 990 or Form 990-EZ and attach a copy of thee-postcard or 990 to this form and submit to Department Headquarters if required. If the Federal ID # is NOT provided, the Local Auxiliary will NOT be revalidated.

- Certified by and signed of Local President and Local Secretary
- This is a legal document.

### **Did not file for three consecutive years**

- Organization will receive revocation letter (CP-120A)
- Need to complete and submit application for Recognition of Exemption Under section 501(a) Form 1024. This form is 19 pages.
- Must complete all parts and schedules.
- Must attach User Fee for Exempt Organization Determination Letter Request Form 8718. Fee is \$600.00  
Did not complete all applicable parts or did not provide all required attachments.
- IRS will return the incomplete application and the organization will have to resubmit.
- This will delay the processing of the application and effective of exempt status.
- May incur additional user fees.
- During the technical review of a completed application
- May be necessary to contact the organization for more specific or additional information.
- If the IRS determines that the organization meets the requirements for tax-exempt status
- IRS will issue a new determination letter

### **Recommendation**

- When the Treasurer files Form 990, Form 00 EZ, or e-Postcard give a copy to the President, Secretary and/or Parliamentarian.
- Locals will need to send a copy to the Department Executive Secretary.

**PURCHASE AN  
AMVETS LADIES AUXILIARY MANUAL  
AND LEARN ALL THERE IS TO KNOW  
ABOUT YOUR POSITION  
AND THE ORGANIZATION**



A For the 20XX Calendar year, or tax year beginning 20XX-06-01 and ending 20XX-05-31

B Check if available  
 Terminated for Business  
 Gross receipts are normally \$50,000 or less

C Name of Organization: AMVETS  
0000 Any Street - SUITE X,  
Somewhere, FL, USA, 33333

D Employee Identification  
Number XX-XXXXXXX

E Website:

F Name of Principal Officer: Minnie Mouse  
0000 Any Street - SUITE X  
Somewhere, FL, USA, 33333

**Privacy Act and Paperwork Reduction Act Notice:** We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

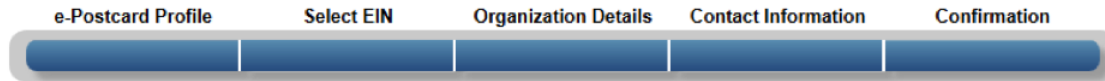
The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

**Note:** This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

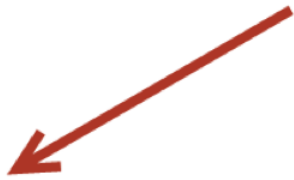
Confirmation

[Home](#) | [Security Profile](#) | [Logout](#)



Your Form 990-N(e-Postcard) has been submitted to the IRS

- Organization Name: XXXXXXXXXXX
- EIN: XX-XXXXXXX
- Tax Year: XXXXXXXXXXX
- Tax Year Start Date: XXXXXXXXXXX
- Tax Year End Date: XXXXXXXXXXX
- Submission ID: XXXXXXXXXXX
- Filing Status Date: XXXXXXXXXXX
- Filing Status: Pending



**Note:** Print a copy of this filing for your records. Once you leave this page, you will not be able to do so.

[MANAGE FORM 990-N SUBMISSIONS](#)

To whoever files the 990 for your Auxiliary, this is what the 990 form looks like; (above the line) you must print this before you leave the Confirmation page. You cannot go back and print once you have left the Confirmation page.

Deadline is September 15, (IRS deadline, so if you have May 31, August 31, or December 31 for your fiscal year end date you are filing for the previous year so you can file the day after your end date and still meet the deadline. Headquarters requests that you send your copies in as soon as you have filed, that way it is less likely that you will forget to send in.

There is a booklet that IRS puts out and it is on our website, read it before you start. Website address is [www.amvetsauxfl.org](http://www.amvetsauxfl.org)

The last step is to make sure you mail two (2) copies of the "Electronic Notice (e-Postcard)" to headquarters before the deadline. This is printed portrait style not landscape or screen shot.

# SERVICE REPORTS

By  
NEC/PDP Sherry Marecek

During this time of the unknown, we all must think outside the box to maintain service to our Organization. Here are just a few ideas:

- Round-up your change at McDonald's. All change goes to Ronald McDonald House and is reportable.
- Clean closets, sheds, garages, etc. Donate all your slightly used material. It's reportable.
- Donate used books and puzzles to a Fisher House, Ronald McDonald House or VA domiciliary. They would be enjoyed and it's reportable.

The AMVETS Ladies Auxiliary National Manual provides extremely detailed information and guidelines regarding Service Reporting. This information is found on pages 97 – 103 of the Manual. Also remember, your Department Service Officers are here to answer any questions and help you in any way they can.

Listed below are some common questions asked by members:

## **Why is reporting so important?**

- Reporting validates our Organization's Charter
- Reporting provides Local Auxiliary members to review and be proud of the wonderful job they are doing
- Reporting shows that across the Nation all Auxiliary's are accomplishing great things together
- Reporting means belonging to an Organization that cares, shares and is concerned about those in need
- Reporting means belonging and proud of being a member of AMVETS Ladies Auxiliary

## **When do you report donations?**

- Donations are reported when the check has been written from the treasury

**Our Auxiliary adopted a child from ABC Elementary. We furnished fixings for Christmas dinner and bought gifts for the family. Why can't we report this in Child Welfare?**

- The magic word is "family". Child Welfare is for children ONLY under the age of 18. This would be a Community Service project.

## **Can we report hours we spend helping out at the Post?**

- No – the word "Auxiliary" means to provide supplementary or additional help and support. Therefore, we are to assist and aid our parent AMVETS by definition.

# IMPORTANCE OF AN AGENDA

By  
PDP Donnajeanne Hakler

What is an agenda: The definition of agenda is a list of items to be discussed at a formal meeting.

Reason for using an agenda:

1. Sets out how the meeting will progress – it is like a map giving directions
2. Lets you know the times and places that you will need to be
3. Lets you know what to expect from the meeting and the order in which items are to be presented or discussed.
4. Gives you information on when certain “events” are to be presented that may be of particular interest to you.
5. Helps to keep the President on point.

For local auxiliary meetings: The agenda should be posted or available for the members so that they can refer to it and know when something they might want to discuss will come up. This also helps make your members feel that they know exactly what is going on.

Remember: All meetings, including committee meetings, are open meetings except those of the Appeal Board and Grievance Committee or unless specified that the meeting is in “executive session”

Sample local auxiliary agenda is attached for information (this is only a suggestion as each auxiliary is different but these elements should be included during your business meeting.

Actions outside of a meeting:

As an officer you need to stay professional and available to your members. Be sociable and approachable – don't just run off when your meeting is over giving the impression that you don't want to be there. You should never make any member feel that any question she may have is not important or that you don't have time for the member.

Remember without your members you would not have an auxiliary and without the auxiliaries we would not have a Department.

Be proud to be a member of your AMVETS Ladies Auxiliary. Never do anything that would make your members or the public think any less of the AMVETS organization.

Get out in your community and volunteer. We are the greatest Veterans organization around and we must always remember that and keep our Veterans at the forefront of what we do, but also remember our children (our future) and our communities.

Member not in good standing: You must have paid your dues in full. In order to hold an office on the Department level (elected) you must also have been a member in good standing for 2 years and for an appointed office for 6 months. You must also attend 1/3 of your local auxiliary's meetings.

For the local Auxiliaries besides having your dues paid in full your local by-laws would determine other criteria is required to be in good standing.

You can become a member not in good standing if you owe your Auxiliary, the Department, or National money and do not repay it.

What could happen if you become a member not in good standing?

1. You cannot hold an office on any level, local, department or national
2. You cannot vote at any meeting
3. You can only be a guest at any meeting
4. You cannot transfer to another auxiliary
5. You may have to become a "new member" in the future (depending on how long you were not in good standing)

NOTE: If for any reason your local auxiliary becomes not in good standing, maybe because they did not comply with Department requirements such as current By Laws or not filing a 990 or doing a revalidation form none of the members could attend a meeting other than as guests and could not vote at any meeting. If you happen to be holding a Department Office you would need to remove yourself from that auxiliary.

It is important that every member as well as your officers know how to remain a member in good standing as well as an auxiliary in good standing.

WE ALL NEED TO COMMUNICATE AND WORK TOGETHER AND WE WILL STAY STRONG!

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### A Short Course in Human Relations

The six most important words: *"I admit I made a mistake"*

The five most important words: *"You did a good job"*

The four most important words: *"What is your opinion?"*

The three most important words: *"If you please"*

The two most important words: *"Thank you"*

The one most important word: *"We"*

The least important word: *"I"*

**(Sample Agenda)**  
**There is also a sample agenda in the Auxiliary Manual**

**AGENDA FOR MEMBERSHIP MEETINGS**  
**AUXILIARY # \_\_\_\_\_**

Call to Order (Date and time)

Prayer, Pledge & preamble (Chaplain and Sgt. at Arms)

Roll call of officers (by secretary)  
Establish that you have a Quorum (secretary)

Minutes (by secretary)

Communications (by secretary)

E-Board Recommendations (by secretary) these need to be moved, seconded & voted on by the membership

Treasurer's Report (file for audit)

Bills (someone make motion to pay)

**OFFICER'S REPORTS:**

1<sup>st</sup> Vice President - Membership  
2<sup>nd</sup> Vice President - Child welfare  
3<sup>rd</sup> Vice President - Community service  
SEC woman  
Americanism  
Hospital  
Scholarship  
Chaplain  
Other Committees:

Unfinished Business:

New Business:

Announcements:

Prayer & respect to the Colors (Chaplain and Sgt. at Arms)

Announcements:

Adjourn