

## GUIDELINES FOR EVALUATORS

The purpose of the annual on-site review between the evaluator and Post/District leadership is to provide guidance and advice; thereby ensuring they are operating pursuant to the provisions of the VFW Bylaws and our Congressional Charter. By collecting data, assessing operations, and lending best practices, the evaluator acts as a diligent instructor who imparts knowledge and guidance to Post officers and members. The findings and recommendations will be discussed with the Leadership in order to create a standard for the Post or District and to ensure a strong foundation for the future. Every effort will be made to conduct an in-person visit. However, if circumstances prevent this, assessments may be conducted virtually.

Many areas can be reviewed in advance of your scheduled visit. *For example:* by visiting the post, district or department website or Facebook page you may be able to determine if;

- Commemorative Dates are being observed.
- View their Bylaws.
- View the minutes to regular and special meetings.
- Listing of Officers.
- By visiting the DPA website you can also see if the post is submitting monthly Community Service Reports. And if you visit the dashboard, you can see if the Post or District have supported the various programs. If they purchased Buddy Poppies, if they have a submitted an Election Report, purchased a QM Bond, if they have submitted their Trustee's Report of Audits etc.

There are certain other areas that are important and must be looked at. If you review the duties and obligations of the Post and District officers (Sec. 218 and Sec. 418) you can select several items that you would like to include during your visit.

*Some Examples may include:*

Under the Commander, it states: **Approve all disbursements of funds properly authorized by the Post by use of voucher or payment order.** *You can verify this by asking to see copies of the VFW Form 4211 which was designed for this purpose.*

Under the Quartermaster, it states: **Collect all monies due the Post, giving receipt therefore.** *You can verify this by asking to see copies of the VFW Form 4200 which was designed for this purpose.*

Under the Adjutant, it states: **The Post Adjutant shall maintain a copy of the original application of every member admitted to the Post.** *You can verify this by asking to look at several applications. At the same time, you can verify that it was approved by the membership committee and signed by the Quartermaster.*

Under the Adjutant, it states: **Maintain a file containing a copy of the proof of eligibility submitted by officers.** *It is not your duty to review these files to ensure the eligibility of the officers. You are only to verify that a file is being maintained.*

Post Minutes: The post minutes should include information on approval to disburse fund, payment of bills etc. If you look at the post minutes for the month of April you should also be able to validate the elections of officers and election of post delegates.

**Of all areas to be looked at, the one that requires the most attention and perhaps the most important, is that of the Quartermaster and the Trustees Reports of Audit.**

To ensure compliance with established VFW Policy and Procedures every assessment shall include a review of the two (2) most recent Audit Reports covering a period of six (6) months with all supporting documents. (Quartermaster ledger, copy of voucher or payment orders, copy of receipts for all monies collected, bank statements, and the Trustees Report of Audit).

- Report illegal activities when seen, before they get out of hand.
- Immediately notify Department when fraud is expected.
- After addressing any issue, it is important to submit a detailed report to your leadership for review. With copies provided to the Post, District or Department as applicable.
- For noted deficiencies and after discussing them with the leadership, include in your report a recommendation to correct noted deficiencies.
- Make sure a follow-up is conducted to ensure a Positive Corrective Action has been implemented.

**NOTE:** A copy of the evaluation will be provided to the Post/District Commander and an additional copy forwarded to the Department Inspector. In accordance with the Department Document Retention Policy, Evaluation Forms are required to be kept on file for a period of three (3) Years.

**VETERANS OF FOREIGN WARS OF THE UNITED STATES**  
ANNUAL DISTRICT EVALUATION FORM (Department of Pacific Area)

DISTRICT No.	DEPARTMENT	EVALUATION DATE
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- 1) Has the DISTRICT adopted Bylaws in accordance with Sec. 402 of the National Bylaws? .....
- 2) Is the amount of DISTRICT dues per member, per Post adequate to support department programs? \_\_\_\_\_
- 3) Are all officers' positions filled as prescribed in Sec.416 of the National Bylaws? .....
- 4) Does the DISTRICT maintain a file containing proof of eligibility for all elected and appointed officers? ...
- 5) Does the DISTRICT have a copy of the latest Podium Edition? .....
- 6) Does the DISTRICT meet in accordance with Sec. 403 with a quorum present? .....

  - a. Date of last school of instruction: \_\_\_\_\_
  - b. Do DISTRICT meetings follow the Rules of Order outlined in Sec. 1001? .....
  - c. Do DISTRICT meetings follow the Order of Business outlined in Sec. 1004? .....
  - d. Does voting procedures conform to Sec. 421 of the National Bylaws? .....

- 7) Have procedures been developed to conduct virtual meetings and allow for virtual attendance? .....
- 8) Are the DISTRICT Adjutant duties performed in accordance with Article IV, Sec. 418? .....
- 9) Are Quartermaster Duties performed in accordance with Article IV, Sec. 418? .....

  - a. Is each officer accountable for funds bonded in accordance with Article VII, Sec. 703? .....
  - b. Name of Bonding Company: \_\_\_\_\_
  - c. Amount of Bond: \_\_\_\_\_, Expiration date of bond: \_\_\_\_\_

- 10) Do the DISTRICT Trustee's perform their duties as outlined in Article IV, Sec. 418? .....

  - a. Date of last Audit: \_\_\_\_\_

- 11) Do all account ledger balances match the balance of reconciled bank statements? .....
- 12) **DISTRICT funds:** Is the Bond greater than the total of all accounts?.....

  - a. Balance of all Checking accounts: \_\_\_\_\_
  - b. Balance of all Savings accounts: \_\_\_\_\_
  - c. Balance of all CD and Bond accounts: \_\_\_\_\_ Federal Employee Identification No.
  - d. Balance of all other account types: \_\_\_\_\_ (EIN): \_\_\_\_\_
  - e. Total of all accounts: \_\_\_\_\_

- 13) Does the DISTRICT retain documents in accordance with the Department's Document Retention Policy?

**COMPLETE THE FOLLOWING ONLY IF APPLICABLE**

- 1) Does the DISTRICT have an Auxiliary? .....

  - a. Has the Auxiliary been organized and in compliance with Article XI?.....

- 2) Does the DISTRICT own real Property? .....

  - a. Appraised Value: \_\_\_\_\_, Monthly Payments: \_\_\_\_\_, Amount Owed: \_\_\_\_\_
  - b. Title Holder: \_\_\_\_\_

- 3) Does the DISTRICT carry all proper types of insurance? .....

  - a. Are both VFW National and the Department Head Quarters named as additional insureds?.....

Comments and Recommendations:

COMMANDER: \_\_\_\_\_ EVALUATOR: \_\_\_\_\_  
NAME and SIGNATURE NAME and SIGNATURE