

NATIONAL ASSOCIATION OF COUNTY
VETERANS SERVICE OFFICERS

MEMBERS MANUAL OF POLICIES
AND PROCEDURES

(Revised October 11, 2023)



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1) INTRODUCTION

This manual is designed to help you better understand your rights and responsibilities as a member of the NATIONAL ASSOCIATION OF COUNTY VETERANS SERVICE OFFICERS (NACVSO).

Questions about “what to do in unusual situations” are always present in an organization. Your knowledge of these procedures should keep small problems from becoming big ones. At the same time, you can be assured your rights, as a member will be respected.

Since administrative rules and procedures are subject to change over time, this manual is designed to allow quick and easy updating. Should you have questions about specific, please contact your state delegate, the appropriate committee chairperson, or member of the Executive Board for clarification.

The National Association of County Veterans Service Officers will continue to promote and protect the rights of veterans and their dependents through education, communication, and technology.

2) NACVSO HISTORY – HOW IT ALL BEGAN

On September 21, 1989, County Veterans Service Officers from eight states, California, South Dakota, Minnesota, Wisconsin, Nebraska, Indiana, Iowa, and Colorado, met at the Department of Veterans Affairs Regional Office at Fort Snelling, Minnesota; these CVSO’s discussed the need to form a “National Association”. Those present elected Jack Stewart, President, Pee Wee Douthat, Secretary, Harold Novotny, Treasurer, and Dea Thorton, Marty Durray, and Lew Schulz as Executive Board members and charged them with forming the association. These officers went to work on formalizing the National Association of County Veterans Service Officers and scheduled the inaugural organizational conference for the following June.

On June 27, 1990, 14 states, California, Florida, North Carolina, Illinois, Indiana, Iowa, Michigan, Minnesota, Nebraska, New York, Ohio, South Dakota, Wisconsin, and Oregon, were represented at the conference. Twenty-Three Service Officers met at the VA Medical Center in Minneapolis, Minnesota and wrote the association’s Constitution and Bylaws thus creating the National Association of County Veterans Service Officers. At this meeting, goals and objectives emphasizing professional development of County Veterans Service Officers were written. With this objective in mind, a National Training and Business Conference was scheduled for the following year.

The 1st Annual NACVSO Training Conference and Business Meeting was held on June 26- 28, 1991, in Springfield, Ohio. It was here that professional development and continuing education became a reality. County Veterans Service Officers from 14 states were present and over 60 individuals took part in the training. The wide variations in state-to-state training levels quickly became apparent so the membership moved to create a National Education Committee to establish a training agenda equitable for all. Cohesiveness in the association began to blossom while membership nationwide increased dramatically.

With a firm education program in hand, the association directed itself to become fully accredited in the eyes of the U.S. Department of Veteran Affairs. To accomplish this goal, an Accreditation Committee was formed; committee members distinguished themselves during many presentations to the VA Central Office Staff and gained National Accreditation in time for the next annual conference. This became a major turning point for NACVSO which now was recognized nationally as a truly professional and accredited organization.

At the 3rd Annual Training Conference, held in Peoria, Illinois in June 1993, with an established training program and approved accreditation tests, the association was honored by the attendance of U.S. Department of Veterans Affairs Deputy Secretary Hershel Gober who personally congratulated attendees and distributed accreditation certificates. NACVSO's three- year struggle to gain national accreditation had

been realized. At the end of the year, NACVSO had 605 members.

Three years later, in 1996 at San Diego, California, we were honored by the presence of Department of Veterans Affairs Secretary Jesse Brown, Deputy Secretary Hershel Gober, and General Counsel Mary Lou Keener. Secretary Brown taught a class on Special Monthly Compensation; we would come a long way.

3) CVSO JOB DESCRIPTION

Summary of Principle Responsibilities - Tasks - Knowledge

Advises and provides technical assistance for the filing of claims under Title 38 United States Code and 38 Code of Federal Regulations as well as county and state benefits, where applicable. Interviews, counsels, and assists in obtaining benefits for veterans, dependents, widows and orphans of war or peacetime veterans, as well as retired and active-duty military personnel and their dependents. Has a thorough knowledge of federal and state laws, statutes, rules, and regulations. Develops working relationships with applicable federal, state and county departments and agencies. Performs research and investigation of the prior claim decisions made by the agency of primary responsibility and reviews the findings and decisions for possible appeal. May maintain benefit projections of county recipients of federal and state veterans' programs and estimate annual receipts into the county from all federal and state agencies in relation to veterans' programs. Maintains a working relationship with veterans' organizations (at county, district, and state levels), staff, volunteers, and news media; provides information regarding department (federal and state) programs and services and performs field informational and claim visits to clients. Requires considerable public speaking ability to address veterans advocate groups and the media concerning current rules, regulations, changes, and trends in the veterans' benefit domain.

4) MISSION

A National Association of County Veterans Service Officers, which aggressively pursues all, benefits for veterans and eligible family members through education, training, and our advocacy programs.

5) PURPOSE

Train & educate CVSOs and veterans advocates in preparation, submission, and representation of claims with Department of Veterans Affairs. Also, to advocate on behalf of veterans and eligible family members to receive the benefits in which they are rightfully earned.

6) VISION

To have NACVSO trained CVSOs, veteran's advocates in all 50 states.

7) OBJECTIVES

- a) To seek diverse sources of funding for NACVSO.
- b) Reliable source of communication with all members to disseminate association data.
- c) Maintain communication efforts to identify veteran-related legislative issues.
- d) Recruit and hire staffing to manage claims and administrative tasks.
- e) Rewrite CVA and update education program.

8) GOALS

- a) Provide appeal representation at the Board of Veterans Appeals (BVA), pending cases & beyond.
- b) Create a sustainable Model for efficient operations.
- c) Continue to grow education opportunities.
- d) Continue to grow and collaboration efforts with VA and legislative efforts at all levels.
- e) Create and publish a short and long-term strategic plan.
 - i) SHORT TERM GOALS

- (1) Continue promoting a progressive legislative platform.
 - (2) Complete an education assessment of member states to tailor progressive training for the membership.
 - (3) Use the member states' DVA offices as an on-going training resource.
 - (4) Provide outreach to states from NACVSO when requested
 - (5) Continue the accreditation training program.
 - (6) Develop a National Association "Education and Training Pamphlet".
 - (7) Develop MOU's and cross-accreditation agreements with the various Veterans Service Organizations.
- ii) LONG TERM GOALS
- (1) Identify progressive steps taken by member states on behalf of veterans and their dependents and mirror those steps nationally when appropriate.
 - (2) Identify job openings for County Veterans Service Officers through its newsletter.
 - (3) Undertake a study to rate VA Regional Offices and VA Medical Centers with an emphasis on performance and services provided.
 - (4) Continue work to expand the interactive computer network with the VA's current computer system.
 - (5) Periodically assess member states' education programs to keep the NACVSO education program up to date.
 - (6) Continue cross-accreditation agreements with the various Veterans Service Organizations.

9) GENERAL POLICIES AND PROCEDURES

It is the policy of the National Association of County Veterans Service Officers to prohibit discrimination on basis of race, color, religion, national origin, political affiliation, disability, marital status, personal lifestyles, creed, sex, or age in all aspects of association practices. All conferences and committee meetings shall be conducted in facilities accessible to persons with disabilities. Should this not be possible, notice must be given when information is sent out to the membership regarding time and place.

10) CODE OF ETHICS

All members of this association must be committed to the highest standards of conduct in the performance of his or her duties. Individual and collective adherence to the highest ethical standards is essential to the maintenance of public trust and confidence.

While members must agree on the need for proper professional conduct, they may experience personal conflict or differing views of values and loyalties. In such cases, the principles contained in this Code of Ethics provide valuable guidance in reaching decisions that are governed, ultimately, by the dictates of the individual conscience of each member and his or her commitment to the public good.

The National Association of County Veterans Service Officers recognizes that all its members should strictly adhere to this Code of Ethics. Each member freely and enthusiastically accepts the responsibility that his or her mission is that of steward to the needs of the veterans, widows, and orphans that he or she serves.

- a) These principles are best expressed as positive statements, actions that should be taken, courses, which should be followed, and goals, which should permeate both public and private conduct. These principles apply to the day-to-day conduct of all association members. All members should:
 - i) Properly administer the affairs of his or her office.
 - ii) Promote only those decisions that will benefit the public trust and encourage the confidence of all veterans in the integrity of the office.
 - iii) Maintain a positive image that will always pass constant public scrutiny.
 - iv) Evaluate all decisions so that the best service and assistance is constantly available to claimants.

- Inject the prestige of the office into everyday dealings with the public and associates.
- v) Maintain a respectful attitude toward all veterans, the public, employees, and other public officials, colleagues, and associates.
 - vi) Effectively and efficiently work with governmental agencies, political subdivisions, and other organizations to further the interests of the veterans being served.
 - vii) Faithfully comply with all applicable laws and regulations and impartially apply them to everyone equally.

11) CODE OF CONDUCT

- a) All members of the association are bound by the following Code of Conduct:
 - i) Always maintain a high professional standard of conduct.
 - ii) Avoid any activity which will bring discredit upon you and/or other members and/or the association.
 - iii) Respect the rights of every member in all deliberations of the association or its subordinate components.

12) DUES

- a) Member State annual Individual membership dues, as defined in the Bylaws under Article II, shall be
- b) \$50.00 and are due in the association Treasurer's office by January 1st of each year. Payments received after April 1st are considered delinquent and shall be increased to \$60 dollars.
- c) Non-member State annual Individual membership dues, as defined in the Bylaws under Article II, shall
- d) be \$65.00 and are due in the association Treasurer's office by January 1st of each year. Payments received after April 1st are considered delinquent and shall be increased to \$75 dollars.
- e) Annual membership dues for states, territories, and Native American Nations shall be \$200.00. Dues shall
- f) be paid to NACVSO and delivered to the association's Treasurer's office by January 1st of each year. Payments received after April 1st are considered delinquent.
- g) Membership dues will be considered delinquent (member not in good standing) as of April 1st of each year,
- h) and if the annual due payment is not received within 30 days the Office of General Counsel will be notified
- i) by the National Service Director to revoke accreditation and all cross-accreditation organizations will be
- j) notified.
- k) Honorary members shall pay no dues.

13) MEETINGS

The presiding officer of any association meeting shall be the President. In the absence of the President the presiding officer shall be one of the following, in the order shown: First Vice President, Second Vice President, and Immediate Past President. (All meeting is conducted IAW NACVSO Bylaws Article VII) The association shall hold at least one general membership meeting and training conference annually. The time and place will be decided by the majority of the membership voting at the general meeting at least two years prior based on the recommendation of the Executive Board.

- a) Teleconferencing/E-Meeting

In order to fulfill its duties economically and efficiently it is appropriate and necessary that the Executive Board conduct business meetings when it is not assembled at one location utilizing teleconferencing or web-based software. Monthly meetings may be held as needed and when requested by the President by using either teleconferencing or web-based meeting software. When conducting business meetings via the NACVSO web page using the Executive Board forum or

during teleconferencing, the Board will continue to use Robert's Rule of Order, (latest edition) as a basic reference; however, some compensation will be made.

The Secretary shall record and report official minutes of all discussions and actions taken by the Executive Board during teleconference calls and internet messaging/E-Meeting. These minutes shall be approved by the Executive Board during the next regularly scheduled Executive Board meeting and shall be made available to the association members through the State Delegates at the next regularly scheduled meeting of the general membership.

- b) Members are reminded that the Secretary is manually recording the minutes of the discussion and should limit the length of their comments accordingly.
 - i) The President may convene a meeting via teleconferencing/E-Meeting. after first announcing a scheduled meeting no less than 72 hours in advance of the meeting.
 - ii) Each member of the Executive Board shall be contacted personally by telephone, facsimile message, or e-mail by the President or his/her designated representative advising the date and time of the teleconference/E-Meeting.
 - iii) Teleconferences will be conducted on a date and at a time that is considered to be reasonable and convenient for all members of the Executive Board. (Normally between 11:00 AM and 5:00 PM EST or EDT, as the season dictates.)
 - iv) These meetings or discussions are not open to the general membership. However, when comments or participation from a specific member of the association, other than a member of the Executive Board, is determined by the President to be necessary and appropriate, they may be included in the conference call.

- c) Internet Meeting/Voting
 - i) When conducting business using internet messaging:
 - (1) All official Executive Board discussions shall be conducted utilizing the internet with the "Executive Board Forum" on the NACVSO web page.
 - (2) These discussions shall not be open to the General Membership. Persons who shall have access other than Executive Board members shall include: Past Presidents who remain members in good standing, any consultant paid by the association, and any member in good standing invited by the President to participate in discussion of any given issue.
 - (3) When the President determines that comments or participation from a member of the association other than a member of the Executive Board is necessary and appropriate, access to the Executive forums shall be granted for the duration of the discussion.
 - (4) Discussions may take place without a motion and/or second.
 - (5) Discussions that are held without a motion and second are not required to be recorded by the Secretary.
 - (6) More than one discussion may be ongoing at any time, and more than one motion may be taken under consideration at the same time.
 - (7) Members of the discussion group are to ensure that their comments are posted to the appropriate discussion string so that the Secretary can accurately record the discussion for the minutes.
 - (8) The President shall recognize, by comment in the discussion string, that a motion and second have been made.
 - (9) Once a motion has made and seconded, the entire discussion string will become part of the official recording by the Secretary including those comments made prior to the motion.
 - (10) When a motion and second are made, only the President may ask if there is more discussion or call for a vote. A member may call for the "question"; however, no vote is required, nor will a vote be taken to end discussion. It is the sole responsibility of the President to end discussion and call for a vote.

- (11) Once the President calls for a vote, no further comment or discussion is appropriate.
- (12) When the President ends discussion, and calls for a vote, each member shall record his or her vote individually.
- (13) All voting entries from the members must be recorded in the appropriate discussion string within 72 hours of the President's call for a vote. Members who fail to respond with the 72-hour time limit shall be considered to be absent.
- (14) Members will vote "yes" when in favor of the motion, "no" when opposed to the motion or "abstain" when deciding not to vote but wanting to be counted as a participant. Variations shall be allowed if the voter's intent is clearly understood (e.g., "aye" instead of "yes").
- (15) When a member of the Executive Board does not submit a vote within three business days, the Secretary shall officially record that member as absent, regardless of their participation during the discussion phase.
- (16) To establish a quorum the Secretary shall use the final vote tally to determine if a quorum is present. A vote yes, no, or abstain shall count towards establishing a quorum. A member recorded as absent shall not count toward establishment of a quorum.

14) MEMBERSHIP

- a) Voting Membership
 - i) Voting membership is open to County Veterans Service Officers and Service Officers as described in Article II of the association's bylaws. Membership will be issued in the individual's name. Should employment terminate, except to move to a different county as CVSO or Service Officer, the "Voting Member" status will change to "Non-Voting Member" with the status corrected at renewal time. A CVSO or Service Officer not belonging to an available state organization will hold a "non-member state" membership at the higher membership rate.
 - ii) The general membership shall exercise final approval authority at the annual meeting for:
 - (1) The proposed annual budget and changes thereto.
 - (2) Changes in organizational structure. See Attachment D.
- b) State Membership
 - i) Yearly member state dues must be received by the Treasurer by October 1. Renewal invoices will be mailed by the Treasurer to the state associations by September 1. Any dues not received by December 31 will be considered delinquent and all privileges revoked, i.e., lower individual membership dues, charter status and all voting privileges. Should a state become delinquent, current individual members will be billed at the higher non-member state rate for the following year.
- c) Non-Voting Membership
 - i) Associate Membership, Honorary Membership, Retired Membership, and Affiliate Membership is open to those persons described in Article II of the association's bylaws who are not eligible for Voting Membership. A member active as a CVSO or Service Office at the time of retirement will retain their membership number with an "R" added in the number sequence replacing the first zero; e.g., 92000001 will change to 92R00001 with the membership card reading "Non-Voting Retired". Retired members may not serve in an elected office but may serve in an appointed position.

15) ELIGIBILITY TO RUN FOR OFFICE

- a) Eligibility to run for elected office shall be open to persons who are Voting Members. The prospective officer must be a member in good standing and meet the following prerequisites.

Position	Prerequisite	Or/and Prerequisite	Prerequisite
President	Served at least one year as 1 st or 2 nd vice year prior to running	Served on E-board for at least 4 years	Member in good standing for at least 5 consecutive years
1 st Vice	Served at least one elected position on e-board	Served on E-board for at least 2 years	Member in good standing for at least 3 consecutive years
2 nd Vice	Served at least one elected position on e-board	Served on E-board for at least 2 years	Member in good standing for at least 3 consecutive years
JA	Past Experience	Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Treasurer	Past Experience	Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Secretary	Past Experience	Attended at least one prior conference	Member in good standing for at least 2 consecutive years
E-Board		Attended at least one prior conference	Member in good standing for at least 2 consecutive years
E-Board		Attended at least one prior conference	Member in good standing for at least 2 consecutive years
E-Board		Attended at least one prior conference	Member in good standing for at least 2 consecutive years
E-Board		Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Women's Advocate	Past Experience	Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Immediate President	Past Last person as president not removed from office for cause	Must be eligible for full voting membership	

16) TIME COMMITMENTS FOR ELECTED OFFICERS AND APPOINTED POSITIONS

The following is presented to give members interested in running for elected office an idea of what time commitment they face in serving the association.

All elected positions need to plan for approximately two and one-half weeks for the Conference Planning meetings and the Conference itself. Additional time may be required.

Additionally, there may be a lot of business conducted via email and in virtual meetings; these should not

add significant extra time to normal office work.

- a) The President needs to plan to attend The National Association of State Veteran Directors Conferences, which take place twice a year, make five or six trips a year to Washington D.C. to meet with VA personnel and legislators, and attend special functions on behalf of the organization. The President can assign other members of the Executive Board to attend in his/her place, a common practice in organizations. These activities will require the President to plan to be out of his/her office an additional 28 to 32 days per year.
- b) The 1st and 2nd Vice Presidents should plan two to four trips to Washington D.C. per year and be prepared to attend functions that the president requests they attend. These activities could require these officers to be out of the office an additional seven to 15 days per year.
- c) The Treasurer averages three to four hours per week on association business. However, this time increases significantly after the conference registration packets are distributed.
- d) The Secretary averages two to three hours per week.
- e) The National Service Director averages about 4 hours per week. The NSD could travel up to 30 days per year for meetings with VA leaders.
- f) The Conference Director spends an average of six hours a week plus two hours a week for the Education Committee. The Conference Director/Time and Place Chair should plan to travel about 20 days per year for site visits, the Leadership Summit and advance planning for the conference.
- g) The Chair of the Education Committee averages ten to fifteen hours per week.
- h) The Chair of the Legislative Committee is out of the office 12 to 15 days a year depending on the current legislative activities.
- i) Washington Liaison is out of the office 12 to 15 days a year depending on the current Department of Veterans Affairs (VA) activities.
- j) The remaining elected officials and appointed positions do not necessarily need to plan significant time out of the office, but it is still possible the President could make a special request of them. See the chart below for clarification.

Position	Time Allocation per Week	Travel
President	20 hours	Conference Planning Board Meeting; Annual Conf.; 2 NASVA Conf.; 1 NACo Conf., Leadership Conference; 3-4 trips to DC; other associated travel
1 st Vice	20 hours	Conference Planning Education and Board Meeting; Annual Conf.; Leadership Summit; 2 NASDVA conf. other associated travel
2 nd Vice	15 Hours	Conference Planning Board Meeting; Annual Conf.; 2 NASDVA conf. other associated travel; Leadership Summit;
JA	2 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit
Treasurer	3-4 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit
Secretary	2-3 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit Leadership Summit;
E-Board	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.;
E-Board	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit
E-Board	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.;
E-Board	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit
Women's Advocate	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.; 2 Women's Conf.; Leadership Summit
Immediate Past President	2-4 Hours	Conference Planning & Board Meeting; Annual Conf.; Conference; 3 NACo Conferences; Leadership Summit;
NSD	4 Hours	Conference Planning & Board Meeting; Annual Conf.; Leadership Summit;
Conference Director	6 Hours	Conference Planning & Board Meeting; Annual Conf.; Legislative Summit; Leadership

		Summit; Site Visits; 20 days per year
Education Chair	10-15 Hours	Conference Planning & Education and Board Meeting; Annual Conf.; Leadership Summit
Washington Liaison	2-4 Hours	Leadership Summit; 12 -15 Days in DC per year
Legislative Representative	2-4 Hours	Conference Planning & Board Meeting; Leadership Summit; 12 - 15 Days in DC per year
Education Team Members	2-3 week-long virtual trainings per year	Conference Planning Education and Board Meeting; Annual Conf.; Leadership Summit; 2 weeks per year

17) EXECUTIVE BOARD

- a) The Executive Board is comprised of all elected officers and the Executive Director. The Executive Board will assume their duties upon being duly sworn and will meet at least twice per year.

18) BYLAWS AND POLICY MANUAL CHANGES

- a) The procedure for submitting proposed changes to the bylaws is described in Article XV of the bylaws.
- b) The Secretary shall ensure that the proposed amendment is on the agenda for the next annual meeting.
- c) The general membership shall vote, by delegate roll-call, as to whether or not to approve the proposed amendment. The proposed amendment must receive a two-thirds majority vote for approval.
- d) This rule may be suspended by a two-thirds majority vote of members present without prior notice for consideration of amendments provided it is such immediate necessity that if it were not considered the purposes, goals, or objective of this association may be harmed, and provided that at least two-thirds of the state delegates are present.
- e) Policy manual changes may be proposed at any Executive Board Meeting where a quorum is met and changed by the Executive Board.

19) NOMINATING COMMITTEE

- a) The nominating committee shall be appointed by the President during the annual meeting. Chaired by the Immediate Past President, this committee is charged with seeking nominations for all pertinent elected offices. The Nominations Committee is responsible for the recruitment and presentation of those eligible members who desire to run for elective office within the association.

20) DELEGATE VOTING

- a) The duly appointed State Delegate will be the only member to be recognized by the chair during all voting proceedings. The delegate will cast votes and present views on behalf of his/her state during business meetings. As far as practical, State Delegations will be seated in one group to allow immediate caucus by the delegation prior to a vote. It is strongly recommended the State Delegate not be a member of the NACVSO Executive Board. Any state member on the NACVSO Executive

- Board will be allowed to vote.
- b) Each Member State Association in good standing shall have three votes at any general or special membership meeting. Each Member State Association shall gain one additional vote for each 15 individual voting memberships paid from that state.
 - c) The Executive Board will communicate to state members through the Delegate and/or Alternate Delegate. Any communication from the association should be presented in a timely manner to the state membership by the delegate.
 - d) Should a state association have a problem with receiving information from the delegate, it is the responsibility of that association to replace the Delegate/Alternate and notify NACVSO.
 - e) For states without associations one to fifteen paid individual memberships will be granted one vote with the person casting that vote selected by the group.
 - f) Additional votes will be granted according to the following formula:
 - i) 16-30 - one additional vote,
 - ii) 31-45 - one additional vote,
 - iii) 46-60 - one additional vote, etc.

21) GENERAL ELECTION PROCEDURES

- a) Method. Contested offices shall be filled by written ballot with the term of office as described in Article IV Officers, Section 1, paragraphs A through H. Each term of office shall begin following the officer's installation.
- b) Who Conducts. Elections shall be conducted by the Immediate Past President. Should the Immediate Past President be unable to fulfill this duty, the Judge Advocate will conduct the election.
- c) Tellers Committee. A "Tellers Committee" shall be appointed by the President at the first business meeting at the Annual Conference. The members of the Tellers Committee should be as "neutral" as possible. The Immediate Past President, or Judge Advocate if applicable, shall chair the committee. The Tellers Committee shall prepare, distribute, collect, tally, report the results to the Immediate Past President, or Judge Advocate if applicable, and retain the ballots.
- d) Written Ballots. The Immediate Past President, or Judge Advocate if applicable, with the assistance of the Tellers Committee, shall prepare written ballots for each office. Each ballot form shall contain the names of the known candidates for the open position and shall have at least two blank lines allowing for write-in candidates' names.
- e) Procedure. Upon closing of nominations for each office, the Tellers Committee shall prepare the written ballots for distribution to the various delegates adding any additional candidates.
- f) Casting Votes. The duly appointed delegate or designee shall obtain the ballot from the Tellers Committee and return to the delegation for discussion and voting. The delegate or designee shall return the ballot to the Tellers Committee in a timely fashion.
- g) Tallying the Votes. The Tellers Committee shall tally the votes, confirm the vote, and report the results to the Immediate Past President, or Judge Advocate if applicable.
- h) Announcing the Result. The Immediate Past President, or Judge Advocate if applicable, shall announce as "winner" the candidate that received the majority vote and shall report the votes cast.
- i) Executive Board Positions. The Executive Board positions that become open at the end of the described two-year term, are hereby "exempted" from the previously described "majority vote" requirement. These Executive Board positions will be selected on a "most votes, and second-most votes" basis.
- j) Should a third Executive Board position come open, separate ballots will be cast and a majority vote will be required to fill this position.
- k) Ballots. Ballots will be retained by the Tellers Committee. Ballots may be destroyed following proper motion and vote.
- l) Voice Vote. Should any position have but a single candidate, the written ballot procedure may be forgone and a simple voice vote, i.e., a vote cast verbally by the delegate or designee, may be used.

- m) Tie Vote. Should the ballot vote result in a tie, a ballot run-off vote will be taken. Should the run-off vote result in another tie, the winner will be determined by a "coin toss" which will be conducted immediately. The "coin toss", using a standard U.S. Quarter, will be by the Immediate Past President, or Judge Advocate if applicable.

22) FISCAL POLICY

All expenses and expenditures of NACVSO shall be approved by the Executive Board through its approval of the NACVSO Annual Budget. Any material variation from the approved budget requires concurrence of the Treasurer, Executive Director and President and written notification and explanation to the Executive Board of such variance.

Limits of Authority

All expenditures approved by the Executive Board of Directors are subject to the following Limits of Authority to enter into any single contract transaction:

Treasurer	\$ 2,500
Executive Director	\$15,000
President	\$25,000

Over \$25,000 requires approval of the Executive Board of Directors except for previously identified contracts for conference related hotel and support contracts. Additionally, all contracts over \$15,000, including those related to conferences, require review by NACVSO General Counsel.

The following persons are authorized to have NACVSO credit cards listed with the authorized credit limit:

President	\$11,000
First Vice President	\$11,000
Executive Director	\$ 9,000
Treasurer	\$50,000
Conference Director	\$ 2,500
Education Director	\$ 3,000
Legislative Director	\$ 2,000
National Service Director	\$ 5,000
Immediate Past President	\$ 5,000

Any misuse will result in disciplinary and/or legal means necessary

Budget

- a) The annual budget for the upcoming fiscal year will be submitted during the annual meeting for the approval of the general membership.
- b) Committee Chairs/ Directors must present their budgetary needs to the Treasurer Executive Director and the Budget Finance Committee by December October 1st for the upcoming fiscal year. The Budget Finance Committee will submit the proposed budget for the coming year to the Executive Board for approval no later than the March board meeting before the annual meeting for distribution to the State Delegates.
- c) The majority vote of the Executive Board will rule in decisions relative to financial matters when a vote from the membership is not required or possible.

Internal Audit

- a) The Audit Committee will meet prior to the annual meeting to audit the association's finances and financial records.
- b) Any irregularities/discrepancies found shall be reported to the President and subsequently reviewed by the Executive Board. The Executive Board shall deal with any discrepancy prior to the report of the audit to the general membership.
- c) A written audit report will be presented at the last business meeting of the annual conference. Audit reports will be available to any member in good standing upon request.
- d) The duties of the Audit Committee are:
 - i. Verify that all checks written and ACH transactions during the year are accounted for, approved, signed, substantiated, not defaced, and that they have been posted to the proper budget category.
 - ii. Verify that all deposits made during the year have been logged accurately and assigned to the proper budget category.
 - iii. Review the bank statements for any unusual fees or withdrawals (check printing fees, for example). Verify proper recordkeeping for these items. Ensure the account was reconciled each month.
 - iv. Verify that IRS Form 990 and any state forms (incorporation renewal or state tax forms, for example) have been filed as necessary.
 - v. Complete a worksheet that summarizes the year's financial activity, including beginning cash balance, total receipts during the audit period, disbursements, and ending cash balance, among others. This is often called the financial review worksheet.
 - vi. Ensure the Treasurer and President are bonded or insured.
 - vii. Ensure the E-Board is insured.
 - viii. Suggest improvements to internal controls such as record-keeping and cash-handling, if needed

External Audit

- a) On years of an external audit, the Audit committee will be responsible for reviewing the findings of the CPA audit and make recommendations to the President and the Board. At the Annual Conference, the Chair of the Committee will report the findings to the full membership during the Treasurer's Report.
- b) An outside CPA firm will be engaged to do an external audit every two years.
- c) This should be on a cash basis and consist of but not limited to:
- d) Complete audit of financial statements in accordance with applicable Generally accepted Accounting Principles
- e) Obtain reasonable assurances that the financial statements are free from material misstatement.
- f) Evaluate appropriate accounting for NACVSO assets.
- g) Review of Tax reporting

A full report of the findings should be given to the Audit Committee upon completion. Audit reports will be available to any member in good standing upon request.

23) TRAVEL POLICY

It is NACVSO's policy to reimburse Executive Board members, trainers, and officials/employees for reasonable out of pocket expenses made while traveling for or engaging in NACVSO official business – subject to the rules and procedures set forth below. This policy applies to any travel directly related to

specific NACVSO business matters, training, administrative, or legislative business. All request for travel reimbursement should be accompanied by legible receipts and the travel expense voucher claim form found on the NACVSO website under the Administrative tab – Documents and Forms:

https://www.nacvso.org/images/company_assets/ca5e4709-02f5-4f0b-a1d7-317e0aaf5cac/files/Expense%20Voucher%20BLANK%20Fillable%20June%207%2c%202017.pdf

- a) Authority to Travel
 - i) Individuals traveling on business for NACVSO must ensure compliance with these regulations.
 - ii) All travel requests will be logged in the travel request section of the website at least 5 days in advance of first day of travel.
<https://www.nacvso.org/form/travel-committee-board>
 - iii) Travel shall be restricted to essential trips for the conduct of NACVSO business and will only be approved within the adopted annual budget. Reimbursement for travel identified within the NACVSO Budget or approved by the President in accordance with the Executive Board's policies shall be made upon submittal of appropriate documentation to the Treasurer without additional approval.
 - iv) The President may waive portions of these regulations where special circumstances warrant if it is in the best interest of the Association. A written request for waiver must be received by the President identifying the reasons for requesting the waiver when unusually expensive travel is anticipated.
- b) Definitions
 - i) "Travel" shall be a trip made by an Executive Board Member, Trainer, or official/employee of NACVSO when it is deemed essential for performing the duties required by the position.
 - ii) "Essential" shall include a minimum of the following criteria:
 - (1) Considered necessary when performing the duties assigned
 - (2) The individual attending is the closest geographically to the location where the required information can be obtained
 - (3) Economically feasible and within the Association's adopted budget
 - (4) Determined to be in the Association's best interest
 - (5) Conformity to the above criteria shall be determined by the President or Treasurer with the approval of the Executive Board
- c) Degree of Care
 - i) All Executive Board Members, Trainers, officials/employees traveling on official NACVSO business shall be expected to exercise the same care in incurring expenses that any prudent person would exercise if traveling on person business.
 - ii) Routing of Travel - All travel shall be by usually traveled route. When a person travels by an indirect route for his/her own convenience, any extra costs shall be borne by the traveler and reimbursement for expenses shall be made only on charges that would have been incurred within the normally traveled route.
 - iii) The most cost-effective way of travel must be used unless otherwise approved by the President.
 - iv) Allowable expenses:
 - (1) Hotel - Lodging - Overnight lodging shall be reimbursed if the individual needs to embark before 6:30 am to attend an approved function in a timely fashion. Additional overnight lodging is also approved if the travel would prevent the individual from returning to their home prior to 8:30 pm. Individuals must choose the most economical rate for lodging. Receipts to the Treasurer shall show a single occupancy rate certified by the hotel, motel, or rooming house.

Lodging Charges for Multiple-Occupancy - When travelers on NACVSO business share a hotel room or lodging facility, reimbursement to the travelers shall be proportionate to of the bill based on the number of individuals occupying the room. In no instance will a suite be afforded if there are multiple-occupancy rooms available at a lesser rate.

- (2) Transportation - rail, bus, airplane, boat, taxi, Uber/Lyft - The expense for traveling by public carrier shall be allowed on the basis of actual expense. All travelers shall be expected to travel by the most economical mode of transportation. However, airfare reimbursement more than coach shall not be authorized unless justified by unusual circumstances. Receipts for public carried travel must be provided to the Treasurer. Private Automobiles - If travel is by private automobile, the maximum allowance shall be established by federal mileage rate by the Internal Revenue Service at the time of travel. <https://www.irs.gov/newsroom/irs-issues-standard-mileage-rates-for-2022> Charges for gasoline, lubrication, repairs, antifreeze, towing, and other similar expenditures for private automobiles shall not be reimbursed. Individuals traveling on NACVSO business shall be properly licensed and adequately protected by personal liability insurance at their own expense. At no time shall personal driving mileage be charged to the Association. The request for mileage reimbursement must include a "MapQuest" of printout showing trip sent to the Treasurer.
- (3) Parking - reasonable reimbursement for parking charges will be allowed with receipts. NACVSO will not reimburse for any parking or traffic violations
- (4) Registration Fees - Fees for conventions and meetings will be allowed for individuals attending as official representatives of NACVSO. These should be approved in advance by the President or Committee Chairperson.
- (5) Auto Rental - When several individuals travel together, the rental of a vehicle through NACVSO's approved carrier, when available, if less expensive than using taxi service may be allowed if an explanation is attached justifying the request.
- (6) Telephone and Facsimile - Charges will be allowed when necessary for official business when letters, emails, etc. will not suffice. Discretion will be utilized as to the number and duration of each transmission or call. One call per day of a limited duration will also be allowed to a traveler's family.
- (7) Executive Board Travel for Conference - When the President along with the Board determine that it is necessary that certain board members be present ahead of regular schedule events in order to facilitate board business, the Association will pay for the expenses incurred, to include lodging and per diem equal to the time required ahead of the regular schedule (excluding travel expenses, as the board members travel would have been required as a regular member). This should typically not extend beyond 48 hours in advance of the regular schedule.
- (8) Miscellaneous -
- (a) Hotel tipping - maximum daily tip at each hotel - check-in and check-out \$3.00
 - (b) Charges for transferring baggage at depots and terminals will be allowable but not more than \$1.00 a bag
 - (c) Airline baggage fees - paid at rate per bag on receipts

24) MEAL POLICY

A per diem rate will be paid based on the location of the hotel at which the traveler is staying at. The GSA link below can be used ahead of time so that each person knows how much they will receive. The first and last day of travel are paid at 75% of the meal and incidentals per the GSA chart. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

- a) Meal Gratuities - in instances where meal expenses are being claimed, the maximum allowable daily tips for meals shall be 18%
- b) Guest Meals
 - i) Travelers are advised that the cost of guest meals will not be allowed unless it can be shown that it was necessary for the official association business

- ii) The Executive Board authorizes the President and Executive Director, or his or her designee, the cost of guest meals when the President determines that it is in the best interest of NACVSO
- iii) These meals will be subject to review by the Executive Board for reasonableness and necessity
- iv) A full explanation must be given when requesting reimbursement including the name and position held by the guest or guests
- c) Alcoholic Beverages
 - i) Under no circumstances will the cost of alcoholic beverages be considered a reimbursable expense
 - ii) The President and the Executive Director may utilize a portion of his/her personal expense budget for beverages if it is felt to be in the best interest of the Association. A great deal of thought should be given prior to utilizing any funds for this purpose and expenses should not exceed a minimum socially accepted amount.

25) PUBLIC RELATIONS POLICY

This public relations policy has been developed to ensure that the public, news media and other external stakeholders receive timely, consistent, accurate, and positive information about NACVSO services, activities, policies, and positions.

- a) Media Contact
 - i) Media relations are managed by the Public Relations Coordinator. The Public Relations Coordinator is responsible for:
 - (1) Arranging media coverage of NACVSO news and events
 - (2) Responding to media inquiries
 - (3) Writing and distributing media releases, letters to the editor, and other official communications, which must be approved in advance as described below.

NACVSO personnel, volunteers, and members should direct all media inquiries to the Public Relations Coordinator except routine requests such as for the date and time of an event or NACVSO's website address. They should contact the Public Relations Coordinator in order to arrange media coverage of NACVSO events and activities. Those who are asked to participate in media interviews on behalf of the organization should be careful to present NACVSO policies and positions accurately and professionally and to avoid giving personal opinions.

26) EDUCATION COMMITTEE POLICY

A comprehensive training program is important in the development of knowledgeable members and should establish objectives that will meet the initial training needs of new members as well as continuing training requirements for accredited members.

Education Committee: The Education Committee is responsible for the formulation and arrangement of all training and educational programs and sessions for the association. The committee shall write a training manual, a training syllabus, provide instructors, and monitor all training programs as necessary.

- a) Definitions:
 - i) Positions:
 - (1) Education Chair:
 - (a) All duties and responsibilities to carry out the educational goals of NACVSO.
 - (b) Represent the Committee to the NACVSO Board
 - (c) Key Host of Educational Events
 - (d) Liaison between Guest Speakers/Trainers for Conferences
 - (e) Responsible for overall training team recruitment
 - (f) Authority to schedule trainings
 - (g) Appoint Senior Trainer
 - (h) Lead Peer Evaluations at the winter board meeting
 - (2) Content Manager:

- (a) Appointed by the President
 - (b) In charge of all slide deck masters and tests
 - (c) Making sure all content is up to date before each Basic Benefits class
 - (d) Updating test and creating new test as needed
 - (e) Developing new educational classes
 - (f) Developing CEU education standards and re-certification testing
 - (g) Being the stand in for the Education Chair in his/her absences
- (3) Senior Trainer:
- (a) Requirements:
 - (i) Appointed by the Education Chair
 - (b) Responsibilities:
 - (i) Responsible for coordination of all NACVSO Trainers.
 - (ii) Main custodian for all accreditation proprietary training materials and tests.
 - (iii) Appoints Trainers for all NACVSO contract training events.
- (4) Lead Trainer:
- (a) The Lead Trainer is appointed by the Senior Trainer.
 - (b) The Lead Trainer is responsible for the administrative tasks. Lead Trainers will be identified for each training event by the Senior Trainer. In the absence of the Senior Trainer the Education Chair will identify the Lead Trainer.
 - (c) Must be a subject matter expert in all NACVSO accreditation proprietary training materials and tests.
 - (d) Must be able to facilitate all questions during an accreditation course.
 - (e) Shall adhere to all administrative guidelines for contract training.
 - (f) If applicable, Lead Trainer will ensure that all Trainers submit their travel expenses within 72 hours following completion of the course.
 - (g) If the Lead Trainer has any questions regarding contract training or any problems arise, the Senior Trainer or Education Chair should be contacted immediately.
- (5) CVA Coordinator:
- (a) A. Appointed by the Education Chair
 - (b) Develop and instruct all CVA course material.
 - (c) Develop and implement all testing material.
 - (d) Conduct all CVA candidate interviews with the Education Chair and 2nd Vice President of NACVSO.
- ii) Classes: *for costs see addendum*
- (1) Basic Benefits:
- (a) Basic Benefits is open to any interested party and covers basic veteran and survivor benefit entitlements. (This class is designed for the new or inexperienced CVSO or those seeking NACVSO accreditation).
 - (b) Mandatory 32-hour course with a required test for those seeking NACVSO accreditation (See accreditation section ##).
- (2) Continuing Education Units / Annual Conference:
- (a) Continuing Education Units
 - (i) 16 hours of defined course work
 - (b) Annual Conference
 - (i) CEU requirements are met by attending the annual conference.
- (3) Advanced Appeals
- (a) Provides an advanced level understanding of the appeals process.
- (4) Certified Veterans Advocate:
- (a) Advanced training certification course designed for NACVSO Accredited CVSOs.
 - (b) Will provide a high-level skill set.
- (5) Supplemental Training:

- (a) Evaluated on a case-by-case basis by Education Chair.
 - (b) Tailored training may be developed based on your state's / organization's individual needs (i.e. Basic Benefits, Continuing Education Units, Advanced Appeals, other)
 - (c) Cost is based on several factors (i.e. number of participants, type of training needed, virtual vs. in-person, organizational relationship with NACVSO).
- b) The Education Committee will also ensure the following:
 - i) Members who successfully complete Basic Benefits Training are properly issued a Certificate of Completion and upon proper application, may be accredited by the Department of Veteran Affairs in accordance with the Policies and Procedures manual.
 - ii) CVSO's who attend annual conference will satisfy their required annual CEU's, which will be reflected on the NACVSO website.
 - iii) Maintain appropriate records concerning the training of all course attendees. The Education Committee will meet on a quarterly basis.
 - c) All education materials, including tests, will be stored on the NACVSO Dropbox with viewing rights for the education team, including the NACVSO 2nd Vice President, and editor rights to the Education Chair, Content Manager, and the Senior Trainer.
 - d) No changes to the master slides will be made or authorized without approval by the Education Chair.
 - e) All CVA proprietary training materials and tests will be stored on the NACVSO Dropbox with viewing rights to the Executive Director and the CVA Coordinator.
 - f) Only the approved NACVSO proprietary training materials and tests will be used to conduct training. All materials will be checked to ensure they reflect the most current information prior to each class.
 - g) Education committee responsibilities for annual conference:
 - i) Will contribute to identifying topics and presenters for the annual conference.
 - ii) Shall contribute to the preparation of a training schedule for the annual conference.
 - iii) Conduct trainer Auditions during each Annual Conference. Only NACVSO members that have applied on the NACVSO Website and meet the prerequisites will be auditioned.
 - iv) Conduct a review of Trainer Peer to Peer Evaluation during each mid-winter meeting. Recommendations for Trainers and Committee will be made after review of the Peer-to-Peer Evaluations.
 - v) If appropriate, will identify four designated trainers for the conference Basic Benefits course.
 - (1) Only the designated trainers that are scheduled to instruct at the annual conference will receive CEU credits and have conference fees waived. They will not be eligible to receive per diem.

27) CERTIFIED VETERANS ADVOCATE

- a) Certified Veterans Advocate (CVA) is an advanced training certification course designed for NACVSO-Accredited Veteran Service Officers. The CVA Program will provide a high-level skill set unique to a CVSO to assist a claimant beyond the point of filing claims and/or Supplemental Claims or Higher-Level Reviews. The CVA training will also cover more complex and comprehensive claims. The goal of the CVA certification is to enable NACVSO-Accredited CVSOs to analyze VA Benefit Decisions and strategize the best course of action for the claimant. To qualify as a Certified Veterans Advocate, CVSOs must pass a rigorous final exam and have a strong working knowledge of the subject matter in the NVLSP Veterans Benefits Manual. Quite simply, CVA graduates are elite County Veteran Service Officers.
- b) Pre-requisites:
 - i) Must have 5 years' experience in Veterans Benefits.
 - ii) Must hold NACVSO accreditation for a minimum of three years.
 - iii) Must have a PIV Card for VA Systems Access. To get your PIV card, please contact your local Regional Office. If you are having difficulty getting your PIV card, please email NACVSO

- through the 'Contact Us'.
- iv) Complete NACVSO Advanced Appeals course prior to CVA examination (December 2021 CVA candidates eligible to take the examination that have not yet taken the Advanced Appeals course may take the first available course in 2022).
 - c) CVA Course Requirements:
 - i) Complete a total of 27 hours of formal training which will be offered twice a year - virtually December and at the NACVSO Annual Conference. In-person attendance is strongly encouraged.
 - (1) 9 hours of CVA training will be offered at each CVA Course.
 - (2) Attendees will be granted CEU credit.
 - (3) CVA Candidates must attend three (3) CVA courses within a 5-year period.
 - ii) Exhibit thorough knowledge of VA claims representation in all entitlement areas by:
 - (1) Completing an examination with a minimum score of 80%.
 - (2) CVA candidates that are eligible to take the final exam need a copy of the NVLSP Veterans Benefits Manual, either print or electronic. A practice exam/study guide will be made available 2 weeks prior to the CVA session. It is highly recommended that candidates utilize that time to study for the exam.
 - (3) Completing an interview conducted by the CVA Coordinator, and/or the Education Chair, and/or the Executive Board Education Liaison.
 - d) Essay
 - i) Briefly explain in essay format your reasons for seeking the professional designation of "Certified Veterans Advocate (CVA)". Please include how your completion of this program will benefit your claimants. Essay should be 500 to 750 words long; you may attach an additional page if this space is not sufficient to concisely express your thoughts. Please include your Essay with this application.
 - ii) Please provide a minimum of two Letters of Recommendation describing why you are an ideal candidate for the advanced CVA program.

28) NACVSO TRAINERS

Trainers will be approved by the Education Chair only after they have been auditioned and approved by the Education Committee. Trainers must be knowledgeable of the material they will present.

- a) Requirements for NACVSO Trainers
 - i) Each should have at least five years of veterans service experience and two years as an NACVSO accredited member.
 - (1) Candidates will only be auditioned upon submission of the Trainer Application and Employer Approval Letter through the NACVSO website.
 - (2) New Trainers will be auditioned at the NACVSO Annual Conference.
 - (3) If selected for further evaluation, the prospective instructor will be scheduled, at NACVSO expense, to present before a live class.
 - (a) Immediately following the class, the Lead Trainer will evaluate and make recommendations to the Education Chair.
 - (4) Inability to meet availability requirements will prevent selection as an NACVSO Trainer.
 - ii) Trainers will be expected to be available for at least one training event (one week) per year in addition to the annual conference.
 - (1) Scheduling will be at the discretion of the Senior Trainer.
 - iii) All trainers will sign and abide by the NACVSO Trainer Standards of Conduct.
- b) Professional Development TBD

29) ACCREDITATION

Accreditation with NACVSO is one of the most important benefits our members have. Accreditation with NACVSO is a privilege offered to its member in good standing and who meet the requirements under the

1. Who will NACVSO Accredite?

Any voting member or non-voting member as described in Article II (2.1) category 1,2, 3, 4 and 7 of the NACVSO Bylaws, in good standing that has completed the Basic Benefits Course or equivalent (determined by the Education Chair) may apply for NACVSO accreditation.

- a) Is a member in good standing (category 1, 2, 3 or 7) and,
- b) A paid employee working not less than 1,000 hours annually for one of the following and,
- c) County government or similar municipality (i.e Parrish, Burrough, etc.) and
 - 1. City government
 - 2. State government
 - 3. Tribal government
 - 4. Territory government
- d) Attend and pass test of NACVSO Basic Benefits Training Course (BBTC) and,
- e) Is of good character and reputation and has demonstrated an ability to represent claimants before VA.

or,

- a) Is a member in good standing (category 1, 2, 3, 7 or 4) and,
- b) Is a paid employee of NACVSO working not less than 1,000 hours annually for the organization and,
- c) Attend and pass test of NACVSO Basic Benefits Training Course (BBTC) and,
- d) Is of good character and reputation and has demonstrated an ability to represent claimants before VA.

NOTE:

- o NACVSO will not accredit claims agents and if you apply to be a claims agent while accredited NACVSO will revoke accreditation.
- o NACVSO will not accredit attorneys unless working in the capacity of a CVSO or other government entity and is willing to sign the NACVSO Attorney Agreement.
- o NACVSO is the primary accreditor for the majority of its members. If NACVSO revokes accreditation, in most circumstances all other accreditations will be revoked.

2. How do members get accredited?

Formal training is required for accreditation applicants from NACVSO. The NACVSO Basic Benefits Course consisting of 30-hours of classroom/virtual training is required for all applicants to be accredited by NACVSO. Accreditation packets will only be accepted through the NACVSO, NSD website.

2a. Member/applicant responsibility for accreditation:

A. NACVSO:

- a) Member/applicant who attend the required NACVSO Basic Benefits Course and pass the end of course exam may apply for accreditation by submitting the necessary documents to the office of the National Service Director (NSD) as per NACVSO Website instructions.
- b) Member/applicant must meet the requirements in Section 1.
- c) Packets must be completed in full and free of errors.
- d) Packets must be signed within 30 days from NACVSO receiving it.
- e) All packets must have only the requested supporting documents.

B. Cross Accreditation:

- a) Cross accreditation will be given per the MOU/Agreement signed with the cross accredited organization and will not be afforded to State Service Officers or other organizational VSO's

2b. NSD responsibility for accreditation:

- A. NACVSO:
 - a) The National Service Director shall review all applications for accreditation submitted by the members to ensure compliance with the 38 CFR § 14, NACVSO By-laws and NACVSO Policies and Procedures.
 - b) Packets will be processed in a manner that the applicant should be accredited with the Department of Veterans Affairs within 90-days.
 - c) Applicants who submit incomplete or packets with errors will be notified of the errors within 90-days of submission (newly submitted packets starts the 90-day process over).
 - d) Packets are processed on a first come, first serve basis.
 - e) The National Service Director shall review all applications for accreditation to ensure completeness and correctness and attest to the applicant's qualifications by affixing his/her signature on the accreditation application and forwarding the required documents accordingly in order to meet the 90-day requirement.
- B. Cross Accreditation:
 - a) The NSD will ensure that all requirements are met per the MOU/Agreement signed by NACVSO and the cross accredited organization.
 - b) All other requirements will be followed by the NSD per Section A above.

3. Maintaining/Recertification of accreditation:

- A. NACVSO
 - a) Qualification for membership must be maintained per NACVSO By-laws.
 - b) Membership dues must not be in arrears.
 - c) CEU's
 - i. Attendance at the NACVSO annual conference counts for all required CEU's and submission to the website is not required.
 - ii. The annual CEU form must be completed and submitted with required course syllabus/agenda through the NACVSO website NLT January 31st.
 - Any training whose syllabus has been approved in advance by the Education Committee.
 - iii. Continuing Education Units (CEUs) will consist of at least 16 hours of classroom instruction annually
 - d) The recertification test must be completed on the NACVSO website as required with a passing score.
- B. Cross Accreditation:
 - o Cross accreditation will be recertified per each MOU/Agreement with said organization.

4. Revocation Of Accreditation:

- A. Accreditation may be revoked by the NSD for violations of the 38 CFR § 14, NACVSO By-laws and NACVSO Policies and Procedures.
 - a) Non-renewal of a member's membership or for membership no longer in good standing can be revoked by the National Service Director, without Executive Board approval.
 - b) If your membership is delinquent or accreditation is pulled due to job loss or other circumstances for a period of more than 36 months, you must retake the Basic Benefits Course to reapply for accreditation
- B. Accreditation and membership may be revoked by the Executive Board for any "Just Cause" act that violates the NACVSO Code of Ethics, Section 10 in the NACVSO Policy and Procedures.
- C. Cross accreditation may be revoked by the cross-accrediting organization for reasons determined by that organization that are not in accordance with (IAW) the MOU/Agreement.

NOTE:

If your accreditation is revoked or inadvertently falls off the OGC list the only recourse is to file a completed new packet for that accreditation. It is important to maintain all your required documents needed for accreditation for this reason.

Dates:

- Annual NACVSO Recertification test is due on January 31st each year (available online from November 1st through January 31st).
- CEU's are due on January 31st each year through the NACVSO website.
- DAV Accreditation Agreement is due for cross accreditation on August 31st of each year.

30) NATIONAL SERVICE DIRECTOR

1. The National Service Director (NSD) must meet all the qualifications of an NACVSO member and accreditation with the VA IAW the CFR 38.
2. The NSD shall serve as a member of the Education Committee and as an ex-officio member of the Executive Board.
3. The NSD shall review all applications for accreditation submitted by the members to ensure compliance with 38 CFR § 14, NACVSO By-laws and NACVSO Policies and Procedures as well as completeness and correctness. They shall attest to the applicant's qualifications by affixing his/her signature on the accreditation application and processing the application for accreditation.
4. The National Service Director shall countersign all "Certificates of Accreditation" and forward them to accredited members together with the VA General Counsel's letter, and any other document or information.
5. The National Service Director shall submit a semi-annual NACVSO Accreditation List and Pending Accreditation List to the Executive Board at the February Executive Board meeting and submit an annual report to the Executive Board and the general membership at the annual meeting.
6. The National Service Director shall interact with the VA on behalf of the association on all matters pertaining to accreditation

31) LEGISLATIVE POLICY GUIDELINES

The Legislative Committee shall have the responsibility of reviewing specific legislation introduced in the House of Representatives and the Senate.

After review, the Committee shall adopt positions on legislation based on the current NACVSO Legislative Platform.

The Legislative Committee shall have the authority to act on any legislative bill or series of bills, as the bills are forwarded, that have majority vote of the committee members until such time as the Executive Board and/or the general membership have reviewed and acted on the committee's recommendation.

After review by the Executive Board and/or the general membership, if in the opinion of the Legislative Committee a specific bill or series of bills has been amended to such a degree that it is contrary to the best interests of veterans or their dependents, the Legislative Committee, after majority vote, may modify the position of the Association and so notify the author and House or Senate Committees.

The Legislative Committee shall notify the Executive Board, the State Legislative Coordinators, and the general membership of any changes to the association's legislative positions at the next available opportunity.

32) LEGISLATIVE CONTACT POLICY

The Washington Liaison and the Legislative Representative Along with the President and 1st and 2nd Vice is NACVSO's official legislative interface. However, all members are encouraged to contact their

Congressional representatives and urge them to vote for the bills on NACVSO's legislative platform.

Every member of NACVSO is encouraged to participate in the annual NACVSO Legislative Day in Washington, D.C., when scheduled.

viii. Approval Process

- a) All testimony, oral and written, prepared for presentation to Congress, position papers designed to officially 'speak' for NACVSO, and all promotional and informational materials, for example, handouts and brochures, must be approved in advance by the Washington Liaison, the Legislative Committee Chair (when appropriate), the Executive Director (when appointed), and the President. A copy of all such material will be

33) LEGISLATIVE COMMITTEE TIMELINE OF ACTIVITIES

JANUARY-FEBRUARY: Review legislation and adopt recommended positions for Executive Board review and approval.

MARCH-MAY: Monitor legislative activity and send letters of support or opposition to the authors of bills and to the House and Senate committees as necessary, consistent with association approved guidelines of positions.

MAY-JUNE: Submit a status report of all legislative activities at association general membership meeting. Have association adopt legislative report and Executive Board- approved positions.

JULY-SEPTEMBER: Monitor legislative activity and send letters of support or opposition to the House and Senate committees as necessary, consistent with the association-approved guideline of position.

OCTOBER-DECEMBER: Review legislative accomplishments, begin drafting legislative platform and prepare legislative recommendations for coming legislative session.

LEGISLATIVE COMMITTEE POSITION DEFINITIONS SUPPORT NACVSO has reviewed the proposal and determined that it has a beneficial effect on the veteran community. On SUPPORT positions, the NACVSO Legislative Committee will draft association letters to legislators who introduce the measures, indicating NACVSO positions. Copies of letters will be sent to other addresses, as deemed appropriate.

ix. Active Support

- a) NACVSO is very interested in the proposal because it has either a major beneficial effect on veterans or a positive financial impact on CVSO's. On ACTIVE SUPPORT positions, the NACVSO Legislative Committee will also monitor the bill through the legislative process and draft appropriate additional correspondence.

x. Oppose

- a) NACVSO is very interested in opposing this measure because it has either a negative effect on the veteran community or a negative financial impact on CVSO's.

xi. Active Oppose

- a) NACVSO has reviewed the proposal and determined that it has a significantly negative effect on the veteran community. On ACTIVE OPPOSE positions, the Legislative Committee will also monitor the bill through the legislative process and draft appropriate additional correspondence.

xii. Information Item

- a) The measure is reviewed or explained for informational purposes only.

xiii. Await Further Study

- a) More information is needed for NACVSO to formulate a position.

xiv. No Position

- a) NACVSO takes a neutral position on the measure but may monitor its progress for future reconsideration.

34) HOSTING THE ANNUAL CONFERENCE

States are encouraged to prepare a proposal to host the annual conference. These guidelines are provided

to assist a prospective host state in preparing a proposal. Prospective host states must understand that final contract negotiations will be done by the NACVSO Conference Director and/or members of Conference Committee. If no proposals are received, the Conference Director and members of the Conference Committee will plan for and execute the annual conference alternating geographical locations.

Guidelines:

c) The Proposal

- 33) Submit a proposal at least four years in advance.
- 34) The conference must be scheduled between May 15 and July 15. However, the conference should not conflict with the Memorial Day weekend and the 4th of July holiday.
- 35) The Executive Board and the Education Committee will meet at the conference site in January of the conference year.
- 36) Demonstrate the ability to fund the President's Reception and other activities your state proposes during the conference.
- 37) Demonstrate that your state can support the various duties and responsibilities needed to run a conference, e.g., business office and storage room security, clerical support, and transportation.
- 38) Demonstrate the support of your state's membership.
- 39) Select a hotel/convention center that can accommodate a large group for both the education and business portions of the conference and the banquet. Accommodations to include family members. This means approximately 500 rooms.
- 40) If a convention center is utilized, confirm that transportation will be arranged by your state's membership or that the hotels are within walking distance to the convention center.
- 41) Ensure that the hotel(s) will be able to accommodate early arrivals a few days prior to the conference and late departures a few days after the conference.
- 42) Ensure that the hotel's dining facilities can accommodate a large group in a timely manner. This is particularly important for the lunch hour. Nearby restaurants should be known as well.
- 43) Ensure that meeting rooms are large enough to accommodate the membership.

d) Business Meeting Room - The Business Meeting room must be set up "classroom" style as follows:

- 33) Aisles in the middle and on each side.
- 34) b. A raised two-tier head table large enough to accommodate 12 persons on each level. Handicap accessible.
- 35) Barrier-free facilities throughout.
- 36) Our national flag must be displayed in each meeting room.
- 37) A microphone/sound system must be available.
- 38) Three 8' tables at the rear of the meeting room for AV.
- 39) Water should be available during all meetings. In the morning, coffee breaks; in the afternoon, iced tea and soft drinks or lemonade.

e) Classrooms - Classrooms should be set up "classroom" style as follows:

- 33) Aisles in the middle and on each side. A three-to-a-table arrangement works best, giving each student ample room.
- 34) Barrier-free facilities throughout.
- 35) A microphone/sound system must be available.
- 36) Appropriate tables for projectors, screens, computers, etc. must be available as needed.
- 37) Power for electronic devices must be available.

- 38) An 8' table at the rear of the room for instructors.
- 39) Water should be available during all classes. In the morning, coffee breaks; in the afternoon iced tea and soft drinks or lemonade.
- f) Banquet Room - The Banquet Room must be set up "banquet" style as follows:
 - 33) Raised two-tier head tables large enough to accommodate the Executive Board and Guests.
 - 34) Consideration must be given to the space needed for opening ceremonies.
 - 35) A Social Hour typically precedes the banquet. The area for this must be of sufficient size to accommodate the membership. A cash bar must be available.
- g) President's Reception
 - 33) When held at the conference site, a space is required for the Monday evening President's Reception. The reception theme varies significantly from year-to-year so needed accommodations vary as well.
 - 34) When held on site the following, as a minimum, should be available:
 - 1. A room or open space of sufficient size.
 - 2. Appetizers.
 - 3. A cash bar.
 - 4. Additional Rooms
- h) Sponsor/vendor space
 - 33) There should be a secure room large enough to host approx. 25 sponsors/vendors, tables and pipe and drape.
 - 34) Ample electric and/or Wi-Fi for this room or area
- i) Additional meeting space
 - 33) Several committees typically meet during the week in addition to the planned Executive Board and Education Committee meetings; the Conference Director will be able to coordinate such requests and make 'already available' rooms open for such meetings.
- j) The Site Selection Team - Conference Director & Conference Committee
 - 33) A Site Selection Team will travel to the proposed site and/or sites to determine adequacy of the site and negotiate the contract for the conference with the hotel/convention center. This will occur as soon as practical after the proposed site has been approved by the Executive Board.
 - 34) In consultation with NACVSO legal counsel, the Conference Director will negotiate the contract with the site hotel/convention center.
 - 35) NACVSO President and Conference Director will sign the contract with the site hotel on behalf of NACVSO, Inc.
 - 36) Assist the host state in developing activities for the conference attendees and other actions as required.
 - 37) The Conference Director will report to the Education Committee and Executive Board all arrangements that are made with the host state and conference site hotel.
 - 38) The Conference Director will act as the sole point of contact (POC) for the conference on behalf of NACVSO, Inc. during the January pre-conference meetings and the annual conference.

NOTE: The purchase and/or sale of any commemorative items by the host state is solely the responsibility of the host state and requires written NACVSO Executive Board approval. Such requests should be submitted at least one year prior to the conference to give the Executive Board time to review and approve the request. Any interaction with members of the hosting state association will always be welcome. This requirement is simply for conference coordination purposes.

Helpful Hints:

- k) Contact members who have previously hosted a conference
- l) Contact local Convention Bureau, some offer grants to bring business into their city.
- m) Work closely with the Conference Director, that person is available to you for your questions during this process.
- n) Added events or activities - Have written information available for distribution on activities that may be enjoyed by members and their families during their stay at the conference. If possible, include transportation information. This should be included when the proposal is submitted.

C. SCHOLARSHIP PROGRAM

a) The Program

- 33) NACVSO maintains a "Scholarship Program" to help members attend the Annual Training Conference.
- 34) Each year the Scholarship Committee accepts applications and forwards them to the Scholarship Selection Committee comprised of all available Past Association Presidents. The Selection Committee reviews applications and selects at least three applicants who each may receive a \$500.00 scholarship. When funds are available, as explained below, more than three scholarships may be awarded.
- 35) Scholarship recipients will be recognized and awarded their scholarship at the annual training Conference for that year

b) Application

- 33) Each year applications must be received by the Chairman of the Scholarship Committee by March 1. Although mailed applications are accepted, the committee highly recommends faxing or e-mailing the application as early as possible. (Both FAX and e-mail provide the sender with proof of transmission.)

c) Funding

- 33) Each year, the association will appropriate \$1500.00 as part of the annual budget to provide for three scholarships. The Committee however has been authorized to hold several fund-raising activities during the Annual Conference. Typically, these fund-raising activities will include solicitation of donations, a 50/50 Raffle, and "special auction items" donated specifically to raise money for the Scholarship Program. Additionally, in the spirit of comradeship, a \$1.00 "Fine" will be levied upon those whose cell phone or pager 'rings' during a class session; the 'fine' is doubled to \$2.00 for the association's officers. Money raised by these 'fines' will be applied to the next conference year's Scholarship Fund.

D. STATE SERVICE OFFICER COORDINATOR

Each member-state association shall recommend to the Executive Board a person to serve as that state's State Service Officer Coordinator. The coordinator shall monitor NACVSO- related training activities in his/her state and shall record each member's completed training. This information shall be recorded on the "NACVSO CEU Report Form" and forwarded to the CEU Coordinator not later than February 15 of each year.

ATTACHMENTS:

- NACVSO Expense Reporting Form
- NACVSO Accreditation Forms – five Pages
- NACVSO CEU Reporting Form – two pages
- Certified Veterans Advocate Application – six pages
- Scholarship Application

