

NATIONAL ASSOCIATION OF COUNTY  
VETERANS SERVICE OFFICERS

MEMBERS MANUAL OF POLICIES  
AND PROCEDURES  
(Revised January 8, 2025)



## Table of Contents

<b>Section</b>	<b>Title</b>	<b>Page Number</b>
1	Introduction	3
2	General Policies and Procedures	3
3	Code of Ethics	3
4	Code of Conduct	3
5	Dues	4
6	Meetings	4
7	Membership	5
8	Eligibility to run for office	6
9	Time commitments for Elected Officers and Appointed Positions	6
10	Executive Board	6
11	Bylaws and Policy & Procedure Manual Changes	6
12	Nominating Committee	7
13	Delegate Voting	7
14	General Election Procedures	7
15	Fiscal Policy	8
16	Travel Policy	9
17	Meal Policy	10
18	Public Relations Policy	10
19	Education Committee Policy	11
20	Certified Veterans Advocate	13
21	Accreditation	14
22	National Service Director	16
23	Legislative Policy Guidelines	16
24	Legislative Contact Policy	17
25	Hosting the Annual Conference	17
26	Scholarship Program	17
27	Partner Policy	18
<b>Enclosures</b>		
I	NACVSO Position Descriptions and Committee Descriptions	i-xxxv
II	NACVSO Expense Reporting Form	xxxvi
III	Scholarship Application	xxxvii
IV	Delegate Information Sheet	xxxviii
V	Strategic Plan	xxxix

## **1) INTRODUCTION**

This Policies and Procedures Manual Serves as the codified document that outlines the necessary policies, procedures, SOPs, best practices, and rules the NACVSO Executive Board, NACVSO members, appointed positions, and employed positions are required to follow.

## **2) 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.

## **3) 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.

## **4) 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.

## **5) DUES**

- a) Member State annual Individual membership dues, as defined in the Bylaws under Article II, shall be \$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.
- b) Non-member State annual Individual membership dues, as defined in the Bylaws under Article II, shall 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.
- c) Annual membership dues for states, territories, and Native American Nations shall be \$200.00. Dues shall 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.
- d) Membership dues will be considered delinquent (member not in good standing) as of April 1st of each year, and if the annual due payment is not received within 30 days the Office of General Counsel will be notified by the National Service Director to revoke accreditation and all cross-accreditation organizations will be notified.
- e) Honorary members shall pay no dues.

## **6) MEETINGS**

The presiding officer of any association meeting shall be the President. In the absence of the President the presiding officer shall be the First Vice President. (All meetings are conducted IAW NACVSO Bylaws Article VII)

The association shall hold at least one general membership meeting and training conference annually.

### **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 during teleconferencing, the Board will continue to use Robert's Rule of Order, (latest edition).

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 on the Executive Board Meetings tab on the NACVSO official website.

- 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. (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) Virtual Meeting Platform
  - i) When conducting business using a Virtual Meeting Platform:

- (1) All official Executive Board discussions shall be conducted utilizing a virtual meeting platform.
- (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 ex officio member, 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 Virtual Meeting Platform 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 required to be recorded by the Secretary.
- (6) \
- (7) When a motion is made and seconded, 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.
- (8) Once the President calls for a vote, no further comment or discussion is appropriate.
- (9) When the President ends discussion, and calls for a vote, votes may be recorded by either roster vote or tabulation.
- (10) 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").

## 7) MEMBERSHIP

- a) Voting Membership
  - i) Voting membership is open to County Veterans Service Officers and Service Officers as described in Article II, Categories 1 and 2 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) Bylaw Changes.
    - (3) Elections of Officers standing for Elections.
- b) State Membership
  - i) Yearly member state dues must be received by the Treasurer by April 1. Renewal invoices will be mailed by the Treasurer to the state associations beginning November 1. Any dues not received by April 1 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) Auxiliary Membership, Honorary Membership, State Membership, and Grandfather Provision Membership is open to those persons described in Article II of the association's bylaws who are not eligible for Voting Membership.

## 8) 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 <sup>st</sup> or 2 <sup>nd</sup> 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 <sup>st</sup> 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 <sup>nd</sup> 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
Executive Board Member (4)		Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Women's Veterans Representative	Past Experience	Attended at least one prior conference	Member in good standing for at least 2 consecutive years
Immediate Past President	Last person as president not removed from office for cause	Must be eligible for full voting membership	

## 9) TIME COMMITMENTS FOR ELECTED OFFICERS AND APPOINTED POSITIONS

See Enclosure XXX (NACVSO Position Descriptions and Committee Descriptions)

## 10) EXECUTIVE BOARD

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

## 11) BYLAWS AND POLICY MANUAL CHANGES

- a) The procedure for submitting proposed changes to the bylaws is described in Article IX of the bylaws. Any voting member, as described in Article II, 2.1, Category 1-2, may submit a proposed Bylaws amendment to the Judge Advocate. Upon review by the Bylaws and Policy and Procedures Committee, the amendment shall be forwarded to the Executive Board for recommendations.
- b) Upon approval by the Executive Board, 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) The Policies and Procedures Manual changes are reviewed by the Bylaws and Policies and Procedures Committee who shall forward the recommendations to the Executive Board for approval.

## **12) NOMINATING COMMITTEE**

The nominating committee shall be appointed by the President at the annual conference. . Chaired by the Immediate Past President, this committee is comprised of the four (4) NACVSO Executive Board members. They are charged with seeking nominations for all pertinent elected positions. The Nominations Committee is responsible for the recruitment and presentation of those eligible members who desire to run for elective office within the association.

## **13) 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.

## **14) GENERAL ELECTION PROCEDURES**

- a) Method. Contested offices shall be determined via contracted electronic voting platform. 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) Procedure. Upon closing of nominations for each office, the contracted electronic voting company shall prepare digital voting clickers for distribution to the State Delegates.
- d) Proxy Voting. Proxy voting is not allowed in the Association elections or Bylaw amendments. The delegate, designee, or State Association President must be present, either in person or virtual, as per the contracted electronic voting company's capabilities and procedures.
- e) Tallying the Votes and Announcing Results. The vote tallying shall be via electronic vote. Upon completion of the voting, the results will be displayed on screen in the Business Meeting. The candidate with the majority of the vote tally will be deemed the winning candidate.
- f) 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.

- g) Should a third Executive Board position come open, separate ballots will be cast and a majority vote will be required to fill this position.
- h) Voice Vote. Should any position have but a single candidate, the electronic voting procedure may be forgone and a simple voice vote, i.e., a vote cast verbally by the delegate or designee, may be used.
- i) 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.

## 15) 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 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	\$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	\$15,000
First Vice President	\$15,000
Second Vice President	\$10,000
Treasurer	\$50,000
Conference Director	\$ 5,000
Education Director	\$ 5,000
Legislative Director	\$ 5,000
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 and the Finance Committee by December 1st for the upcoming fiscal year. The 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.

#### External Audit

- a) 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 year.

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.

### **16) TRAVEL POLICY**

- a) 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. Authority to Travel
  - i) Individuals traveling on business for NACVSO must ensure compliance with these regulations.
  - ii) 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.
  - iii) 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
- c) Degree of Care
  - i) The most cost-effective way of travel must be used unless otherwise approved by the President.
  - ii) 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.
    - (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.

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.

- (3) Parking - reasonable reimbursement for parking charges will be allowed with receipts. NACVSO will not reimburse for any parking or traffic violations
- (4) Airline Baggage Fees – NACVSO will reimburse for baggage fees up to \$30 per bag, not to exceed \$60, each way.
- (5) 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.
- (6) Auto Rental - When several individuals travel together, the rental of a vehicle, when available, if less expensive than using taxi service may be allowed if an explanation is attached justifying the request.
- (7) 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.

## **17) 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.

- 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, 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

From time to time, NACVSO will host members and dignitaries at events and cocktail hours where alcohol may be provided. However, under no circumstances will the cost of alcoholic beverages be considered a reimbursable expense for individuals

## **18) 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 contracted entities who are 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.
- (4) Social Media

## **19) 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) Director of Education:**

- (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) Lead Peer Evaluations
- (h) Reports to the President
- (i) Coordinates communications to the Executive Board with the Second Vice President

#### **(2) Content Manager:**

- (a) Appointed by the Director of Education
- (b) In charge of all slide deck masters and tests
- (c) Content is up to date before each Basic Benefits class
- (d) Update 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 Director of Education
- (b) Responsibilities:
  - (i) Responsible for coordination of all NACVSO Trainers.
  - (ii) Main custodian for all accreditation proprietary training materials and tests.

#### **(4) Lead Trainer:**

- (a) The Lead Trainer is appointed by the Director of Education.
- (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 Director of Education 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) Appointed by the Director of Education
    - (b) Develop and instruct all CVA course material.
    - (c) Develop and implement all testing material.
    - (d) Conduct all CVA candidate interviews with the Director of Education and Second Vice President.
  - b) NACVSO TRAINERS
    - i) Trainers will be approved by the Director of Education only after they have auditioned and are approved by the Education Committee. Trainers must be knowledgeable of the material they will present.
    - ii) Requirements for NACVSO Trainers
      - (1) Each should have at least five years of veterans service experience and two years as an NACVSO accredited member.
      - (2) Candidates will only audition upon submission of the Trainer Application and Employer Approval Letter through the NACVSO website.
      - (3) New Trainers will audition at the NACVSO Annual Conference.
      - (4) If selected for further evaluation, the prospective instructor will be scheduled, at NACVSO expense, to present before a live class.
      - (5) Immediately following the class, the Lead Trainer will evaluate and make recommendations to the Director of Education .
      - (6) Inability to meet availability requirements will prevent selection as an NACVSO Trainer.
      - (7) Trainers will be expected to be available for at least one training event (one week) per year in addition to the annual conference.
      - (8) Scheduling will be at the discretion of the Senior Trainer.
      - (9) All trainers will sign and abide by the NACVSO Trainer Standards of Conduct.
      - (10) Professional Development TBD
  - c) Classes:
    - i) Intro to VA Benefits
      - (1) Intro to VA Benefits is open to any interested party interested in learning about veterans benefits
      - (2) The course is 8-16 hours of information regarding Federal Benefits
    - ii) Basic Benefits:
      - (1) Basic Benefits is open to any individuals who meet the requirements under Article II Section 2.1, Category 1, Category 2, Category 3, and Category 5 and covers basic veteran and survivor benefit entitlements. (This class is designed for the new or inexperienced CVSO or those seeking NACVSO accreditation).
      - (2) Mandatory 32-hour course with a required test for those seeking NACVSO accreditation.
    - iii) Continuing Education Units / Annual Conference:
      - (1) Continuing Education Units - 16 hours of defined course work
      - (2) Annual Conference - CEU requirements are met by attending the annual conference.
      - (3) Advanced Appeals - 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 claims and administrative appeal advocacy.
        - (c) Understanding and knowledge on reading and comprehending Laws, Regulations, and Caselaw
        - (d) Education on legal writing and written arguments
      - (5) Any other courses or areas of study determined beneficial by the Director of Education and as approved by the Executive Board

- d) The Education Committee will also ensure the following:
  - i) Members who successfully complete Basic Benefits Training are properly issued a Certificate of Completion.
  - 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 at a minimum.
- e) All education materials, including tests, will be stored on the NACVSO Dropbox with viewing rights for the education team, including the NACVSO Second Vice President, and editor rights to the Director of Education, Content Manager, and the Senior Trainer.
- f) No changes to the master slides will be made or authorized without approval by the Director of Education.
- g) All CVA proprietary training materials and tests will be stored on the NACVSO Dropbox with viewing rights to the President, First Vice President, Second Vice President, Director of Education, and the CVA Coordinator.
- h) 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.

## **20) 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
- 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.

## **21) 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 38 CFR § 14, NACVSO By-laws and NACVSO Policies and Procedures.

### **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:**

- 1. 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.
- 2. 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.

#### **22) NATIONAL SERVICE DIRECTOR**

- a) The National Service Director (NSD) must meet all the qualifications of an NACVSO member and accreditation with the VA IAW 38 CFR.
- b) The NSD shall serve as a member of the Education Committee and as an ex-officio member of the Executive Board.
- c) 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.
- d) 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.
- e) 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.
- f) The National Service Director shall interact with the VA on behalf of the association on all matters pertaining to accreditation
- g) The National Service Director may recommend to the President a member to serve as Assistant National Service Director
- h) Links to Forms:
  - a. CEU Reporting: <https://www.nacvso.org/accreditations>
  - b. Accreditation Forms: <https://www.nacvso.org/applying-for-nacvso-accreditation>

#### **23) LEGISLATIVE POLICY GUIDELINES**

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

Director, National Policy Director, President, First Vice President, and Second Vice President.

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.

#### **24) LEGISLATIVE CONTACT POLICY**

The Legislative Director, National Policy Director, the President, First Vice President, and Second Vice President are 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.

#### **25) HOSTING THE ANNUAL CONFERENCE**

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.

- a) Site Selection Team shall be comprised of the Conference Director and Conference Committee
- b) In consultation with NACVSO General Counsel, the Conference Director will negotiate the contract with the site hotel/convention center
- c) NACVSO President and Conference Director will sign the contract with the site hotel
- d) If a conference location has a State CVSO Association, the Conference Committee will assist the host state in developing activities for the conference attendees
- e) The Conference Director will report to the Education Committee and Executive Board all arrangements are made with the host state and conference site or hotel
- f) The Conference Director will act as the sole point of contact (POC) for the conference on behalf of NACVSO during the annual conference.

#### **26) SCHOLARSHIP PROGRAM**

- a) The Program
  1. NACVSO maintains a "Scholarship Program" to help members attend the Annual Training Conference, Leadership Summit, and Basic Benefits.
  2. The Scholarship Committee is comprised one Executive Board member, serving as Chair, and four members in good standing appointed by the President. The Scholarship Committee reviews applications and selects at least three applicants. When funds are available, as explained below, more than three scholarships may be awarded.
    - a. Scholarships awarded to the Annual Conference will be for the Conference Registration
    - b. Scholarships awarded to the Leadership Summit shall be for the payment of the member's lodging expenses
    - c. Scholarships awarded for the Basic Benefits Course shall be the course fees

- b) Application
  - a. Applications for the Annual Conference must be received sixty (60) days before the Annual Conference
  - b. Applications for the Leadership Summit must be received sixty (60) days before the Leadership Summit
  - c. Applications for the Basic Benefits Course must be received sixty (60) days before the start of the Basic Benefits Course in which the member is applying.
- c) Funding
  - a. Each year, the association will appropriate \$1500.00 as part of the annual budget to provide for three scholarships.
  - b. The Committee however has been authorized to hold several fund-raising activities during the Annual Conference.
  - c. Typically, these fund-raising activities will include solicitation of donations, a 50/50

## 27. PARTNER POLICY

- a) Provide transparent language easily understood by the organization, its members, partners, and potential partners, concerning the expectations of partners and their ability to engage with the organization beyond the annual conference.
- b) Communications with partners: All forms of contact and discussions as to levels of partnership shall be directed to the representatives assigned and or contracted to provide conference fundraising services to NACVSO, if there is no representative assigned or contracted, this duty shall be that of the President of the organization or their designee. Each year the parties responsible shall distribute to partners and potential partners a listing of contribution levels ranging from exhibitor to Platinum level sponsorships, within this listing it shall be defined what partners can expect with their level of commitment to the conference. In order for NACVSO to provide added value to its partners, they would like to assure that our partners can engage with members throughout the year. This policy will provide “annual partners” with additional opportunities. These additional deliverables shall be provided from the date of contract received for the conference until the end of the conference year. Ensuring the partners receive these additional features for their commitment will be the primary responsibility of the Operations Manager with the cooperation of the executive board, the Membership Committee, the Social Media Manager and the Website Manager.
- c) Annual Partners
  - i. **Gold-** Website logo with hyperlink to the partners website. Physical address mailing list to offices of members, email list of members, social media mentions 3 times that year. Link on website tailored to benefit the Veteran advocate. Logo placement with visibility during all virtually hosted events.
  - ii. **Platinum-** Website logo with hyperlink to the partners website. Physical address mailing list to offices of members, email list of members, social media mentions 3 times that year, with a Feature story, also direct emailed to members. Link on website tailored to benefit the Veteran advocate, virtual survey of membership concerning product or services of the partner. Logo placement with visibility during all virtually hosted events.
- d) Benefit Allocations:

Benefit	Gold	Platinum
Hyperlink on website	X	X
Physical mailing list	X	X
Email list	X	X

Three social media mentions	X	X
CVSO specific website message	X	X
Logo placement during virtual events	X	X
Feature story with NACVSO social media & email to members		X
Direct survey to members for data concerning product for services		X

## **President**

The President shall preside over all general meetings and meetings of the Executive Board. The President, or the President's designated representative, shall represent the association at all functions requiring representation. The President shall also perform such other duties as may be directed by the Executive Board. The President shall be bonded. Bylaws Article III, Section 3.1(A)

## **Terms of Service**

The President's term of office shall be for two years.

## **Duties**

The President shall act as the Chief Executive of NACVSO

The President shall direct and supervise day-to-day activities of the appointed and employed positions

The President shall call and chair all meetings of the Executive Board

The President shall be a member of the Finance Committee

The President shall act as NACVSO's primary public facing individual who will interact and coordinate both short and long-term partnerships, sponsorships, and interactions between individuals, businesses, and government agencies

The President shall be NACVSO's liaison to National Association of State Directors of Veterans Affairs (NASDVA)

The President shall be NACVSO's liaison for legislative affairs

The President shall appoint Directors and Chairs of committees, appointed positions, and special assignments

The President shall call and conduct the Annual General Business Meetings

The President shall create, communicate, and implement NACVSO's overall direction

The President is empowered to expend Association funds up to their limit of authority

The President shall cause to be amended the NACVSO Strategic Plan upon determination of new endeavors, legal requirements, legislative changes, and changing direction

The President shall have authority on NACVSO legislative prerogatives

The President shall be responsible for preparing and mentoring the 1<sup>st</sup> Vice President and/or 2<sup>nd</sup> Vice President to assume leadership and Presidential duties

## **Time Commitment**

The President should be prepared to dedicate 30 hours per week

The President should be prepared to spend fifty-five to sixty (55-60) days away from local office

The President shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit, and one (1) NACo Conference; two (2) NASDVA; seven (7) trips to Washington, DC; other associated travel as may be required.

### **First Vice President**

The First Vice President shall perform such duties as may be assigned by the President and shall perform the duties of the President in the absence of the President. In the event of the permanent removal or death of the President, the First Vice President shall assume the full duties, power, and authority of the President until the end of the existing term. The First Vice President shall serve as an ad-hoc member of the Legislative Committee. Bylaws Article III, Section 3.1(B)

### **Term of Service**

The First Vice President's term of office shall be one year, as elected.

### **Duties**

First Vice President shall perform such duties as may be assigned by the President and shall perform the duties of the President in the absence of the President

In the event of the permanent removal or death of the President, the First Vice President shall assume the full duties, power, and authority of the President until the end of the existing term

The First Vice President shall assist the President in designing, creating, and achieving the mission, values, and strategic plan of NACVSO

The First Vice President shall be an ad-hoc member of the Legislative Committee

The First Vice President shall be NACVSO's liaison for legislative affairs

The First Vice President shall be a member of the Finance Committee

The First Vice President shall attend all Executive Board Meetings and be prepared to Chair the Executive Board Meetings in the absence of the President

The First Vice President shall facilitate speakers and presenters at the Annual Conference are appropriately staged

The First Vice President shall assist appointed and employed positions in ensuring sponsors and vendors are appropriately tended to at the Annual Conference

The First Vice President shall present the annual internal audit to the Association membership at the Annual Conference

The First Vice President shall attend all NASDVA Conferences to support the President and interfacing with State Directors and Strategic Partners

The First Vice President shall attend, as determined by the President, any meetings

The First Vice President shall attend NACVSO Annual Conference, Leadership Summit, and other associated travel as may be required

The First Vice President shall provide mentorship to all Officers and Executive Board Members

The First Vice President shall provide guidance to Directors and Committee Chairs

### **Time Commitment**

The First Vice President should be prepared to dedicate 30 hours per week

The First Vice President should be prepared to spend forty-five to fifty (45-50) days away from local office

The First Vice President shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; two (2) NASDVA Conferences; four (4) trips to Washington, DC; other associated travel as may be required.

## **Second Vice President**

Second Vice President shall perform such duties as may be assigned by the President and shall perform the duties of the President in the absence of the President and First Vice President. In the event of the permanent removal or death of the First Vice President or upon the assumption of the Presidency by the First Vice President, the Second Vice President shall assume the full duties, powers, and authority of the First Vice President until the end of the existing term. The Second Vice President shall serve as an ad-hoc member of the Education Committee. Bylaws Article III, Section 3.1(C)

### **Term of Service**

The Second Vice President's term of office shall be one year, as elected.

### **Duties**

The Second Vice President shall perform such duties as may be assigned by the President and shall perform the duties of the President in the absence of the President and First Vice President

In the event of the permanent removal or death of the First Vice President or upon the assumption of the Presidency by the First Vice President, the Second Vice President shall assume the full duties, powers, and authority of the First Vice President until the end of the existing term

The Second Vice President shall serve as an ad-hoc member of the Education Committee

The Second Vice President shall be NACVSO's liaison for the Education Committee

The Second Vice President shall serve as a member of the Finance Committee

The Second Vice President shall serve as the Awards Committee Chair

The Second Vice President shall attend all NASDVA Conferences to support the President and First Vice President in interfacing with State Directors and Strategic Partners

The Second Vice President shall be NACVSO's liaison for legislative affairs

The Second Vice President shall assist the appointed and employed positions at the Annual Conference with the operations of the Conference

The Second Vice President shall provide mentorship to junior Officers and Executive Board Members

The Second Vice President shall provide guidance to Directors and Committee Chairs

### **Time Commitment**

The Second Vice President should be prepared to dedicate 15 hours per week

The Second Vice President should be prepared to spend twenty to twenty-five (20-25) days away from local office

The Second Vice President shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; two (2) NASDVA Conferences; two (2) trips to Washington, DC; other associated travel as may be required.

## **Secretary**

The Secretary shall prepare and maintain minutes of all general business meetings and meetings of the Executive Board. The Secretary shall maintain the association's records and correspondence files, both incoming and outgoing, be responsible for maintaining current copies of the Bylaws and the Policies and Procedures Manual, and all other documents and publications promulgated by the association or its members. Bylaws Article III, Section 3.1(D)

## **Terms of Service**

The Secretary's term of office shall be three years

## **Duties**

The Secretary shall maintain the association's records and correspondence files, both incoming and outgoing, be responsible for maintaining current copies of the Bylaws and the Policies and Procedures Manual, and all other documents and publications promulgated by the association or its members.

The Secretary shall prepare and maintain minutes of all general business meetings and meetings of the Executive Board.

The Secretary shall ensure the most recently approved Bylaws and Policy and Procedures are uploaded to the Association Website

The Secretary shall ensure the approved meeting agendas and meeting minutes of the Executive Board and the Association Conferences are uploaded to the Association Website

The Secretary shall take roll call at Executive Board Meetings and the Association Conferences

The Secretary shall report whether quorum is achieved at both Executive Board Meetings and the Association Conferences

## **Time Commitment**

The Secretary should be prepared to dedicate 2-3 hours per week

The Secretary should be prepared to spend eight to ten (8-10) days away from local office

The Secretary shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit.

## **Treasurer**

Treasurer shall maintain the records of all financial transactions conducted by the association, the association's budget, and the records of all assets (financial, real, and planned assets) of the association. The Treasurer shall be empowered to open any necessary accounts, at any financial institution, in the name of the National Association of County Veterans Service Officers, Inc. The Treasurer with the President are empowered to expend association funds. The Treasurer will ensure the necessary authorization documents are available for the President signature at the annual conference. The Treasurer shall be bonded. The Treasurer's term of office shall be three years. The Treasurer shall be the association's Chief Financial Officer. Bylaws Article III, Section 3.1(D)

## **Terms of Service**

The Treasurer's term of office shall be three years.

## **Duties**

The Treasurer shall be the association's Chief Financial Officer

Treasurer shall maintain the records of all financial transactions conducted by the association, the association's budget, and the records of all assets (financial, real, and planned assets) of the association

The Treasurer shall be empowered to open any necessary accounts, at any financial institution

The Treasurer is empowered to expend Association funds up to their limit of authority

The Treasurer will ensure the necessary authorization documents are available for the President signature at the annual conference

The Treasurer shall serve as the Chair of the Finance Committee

The Treasurer shall attend all Executive Board Meetings

The Treasurer shall create the annual budget of NACVSO

The Treasurer shall present NACVSO's annual budget at the Annual Conference for consideration and approval by membership

The Treasurer shall be responsible for adjudicating NACVSO Officer and Executive Board Members travel vouchers

The Treasurer shall be responsible for issuing and monitoring credit card limits of those Officers and Executive Board Members who require same

The Treasurer shall be responsible for coordinating and facilitating an external audit be conducted every two (2) years

The Treasurer shall ensure the Audit Committee and external Auditors are provided with all documentation and budgetary analysis required to properly conduct audits

## **Time Commitment**

The Treasurer should be prepared to dedicate 8-10 hours per week

The Treasurer should be prepared to spend eight to ten (8-10) days away from local office

The Treasurer shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit.

## **Judge Advocate**

Judge Advocate shall advise the President and presiding officers on questions of parliamentary procedure for the conduct of business and be responsible for reviewing any perspective changes to the bylaws. The Judge Advocate shall interpret the Bylaws when called upon by the President. The Judge Advocate's term of office shall be three years. The Judge Advocate shall be the association's Chief Parliamentarian. Bylaws Article III, Section 3.1(F)

### **Terms of Service**

The Judge Advocate's term of office shall be three years

### **Duties**

The Judge Advocate shall be the Association's Chief Parliamentarian

Judge Advocate shall advise the President and presiding officers on questions of parliamentary procedure for the conduct of business and be responsible for reviewing any perspective changes to the bylaws

The Judge Advocate shall interpret the Bylaws when called upon by the President

The Judge Advocate shall Chair the Bylaws and Policy & Procedures Committee

The Judge Advocate shall assume the role of the IPP in the event the IPP cannot perform the duties of running the Election for Officers and Executive Board Members

The Judge Advocate shall attend the Annual Conference

The Judge Advocate shall present to the Association any proposed bylaw changes at the Annual Conference

### **Time Commitment**

The Judge Advocate should be prepared to dedicate 4-6 hours per week

The Judge Advocate should be prepared to spend eight to ten (8-10) days away from local office

The Judge Advocate shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit.

## **Women Veterans Representative**

The Women Veterans Representative shall be responsible for ensuring that all proceedings entered by this association shall meet the need of women veterans. The Women Veterans Representative shall coordinate the representation of the Association in all its dealings with federal, state, and local government regarding women veterans' issues. The Women Veterans Representative's term of office shall be two years. The Women Veterans Representative shall chair the Women Veterans Issues Committee. Bylaws Article III, Section 3.1(G)

### **Terms of Service**

The Women Veterans Representative's term of office shall be two years.

### **Duties**

The Women Veterans Representative shall be responsible for ensuring that all proceedings entered by this association shall meet the need of women veterans

The Women Veterans Representative shall coordinate the representation of the Association in all its dealings with federal, state, and local government regarding women veterans' issues

The Women Veterans Representative shall chair the Women Veterans Issues Committee

The Women Veterans Representative shall plan, coordinate, and host the Women Veterans Luncheon at the NACVSO Annual Conference

The Women Veterans Representative shall be responsible for scheduling one hour training at the NACVSO Annual Conference

The Women Veterans Representative shall provide a brief to the NACVSO Membership on Women Veterans Issues

The Women Veterans Representative shall form and maintain a support network as a liaison to NACVSO and all women veteran programming

The Women Veteran Representative shall create and maintain all professional relations and development with regard to all women veteran programming and entities

### **Time Commitment**

The Women Veterans Representative should be prepared to dedicate 4-6 hours per week

The Women Veterans Representative should be prepared to spend fifteen to seventeen (15-17) days away from local office

The Women Veterans Representative shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; two (2) Women Veterans Conferences; NACVSO Leadership Summit.

### **Executive Board Members**

The Executive Board Members shall perform duties assigned by the President. The Executive Board Members' term of office shall be two years, with two members elected in even number years and two members elected in odd number years. They will serve as chairpersons of standing committees as appointed by the President. Bylaws Article III, Section 3.1(H)

### **Terms of Service**

The Executive Board Members' term of office shall be two years, with two members elected in even number years and two members elected in odd number years

### **Duties**

The Executive Board Members shall perform duties assigned by the President

The Executive Board Members shall serve as chairpersons of standing committees as appointed by the President

The Executive Board Members shall attend all called Executive Board Meetings

The Executive Board Members shall appoint one (1) member of the Audit Committee per Executive Board Member

### **Time Commitment**

The Executive Board Members should be prepared to dedicate 2-4 hours per week

The Executive Board Members should be prepared to spend eight to ten (8-10) days away from local office

The Executive Board Members shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit.

### **Immediate Past President**

The Immediate Past President (IPP) shall be the preceding duly elected President who was not removed for cause.

### **Terms of Service**

The IPP shall serve during the term of their immediate successor

In the event of the death or removal of the current President, the IPP will remain for the duration of the term of the next President

In the event of the death or removal of the IPP, the preceding IPP will assume the duties of the IPP

### **Duties**

The IPP shall maintain their vote for the pendency of their successor to the Executive Board

The IPP shall advise the President and the Executive Board

The IPP shall attend three NACo Conferences and serve on the NACo Veterans Affairs Committee as Vice Chair

The IPP shall serve as the Nominations Committee Chair and run elections of officers

The IPP shall solicit members as potential candidates for Executive Board

### **Time Commitment**

The IPP should be prepared to dedicate 2-4 hours per week

The IPP shall attend NACVSO Board Meetings, the Annual Conference, NACVSO Leadership Summit, and three (3) NACo Conferences

Any other Conferences or Commitments at the discretion of the President

## **National Service Director**

The National Service Director (NSD) administers the NACVSO accreditation program. The term of office for the National Service Director is three years. The NSD shall not be removed without the concurrence of the Executive Board. Bylaws Article IV, Section 4.1(C)

### **Terms of Service**

The term of office for the NSD is three years. The NSD shall not be removed without the concurrence of the Executive Board

### **Duties**

The NSD administers the NACVSO accreditation program

The NSD shall review all applications for accreditation submitted by the members to ensure compliance with the NACVSO Policies and Procedures Manual.

The NSD shall receive Continuing Education Units (CEU) from members not attending the annual training conference showing membership compliance with US Department of Veterans Affairs Office of General Counsel (VA OGC) accreditation requirements

The NSD must meet all the qualifications of an NACVSO State Service Officer Coordinator.

The NSD shall serve as a member of the Education Committee and as an ex officio member of the Executive Board.

The NSD shall countersign all "Certificates of Accreditation" and forward them to accredited members together with the VA OGC's letter, and any other document or information.

The NSD 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.

The NSD shall interact with the VA on behalf of the association on all matters pertaining to accreditation.

The NSD shall be responsible for ensuring the annual recertification examination of members have been completed and will report the results to the VA Office of General Counsel

### **Time Commitment**

The NSD should be prepared to dedicate 20-25 hours per week

The NSD should be prepared to spend twenty-five to thirty (25-30) days away from local office

The NSD shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; four (4) trips to Washington, DC; other associated travel as may be required.

### **Assistant National Service Director**

The Assistant National Service Director (ANSD) assists the NSD in administering the NACVSO accreditation program.

#### **Terms of Service**

No specific Term of Service

#### **Duties**

The ANSD assists the NSD with all duties and responsibilities.

The ANSD shall be prepared to assume duties of NSD in the event of death, retirement, or removal of NSD

#### **Time Commitment**

Time Commitment should be prepared to dedicate 15-20 hours per week and contingent upon NSD availability and direction of the President

The ANSD shall attend the Annual Conference, NACVSO Leadership Summit, and other associated travel as may be required.

## **Legislative Director**

The Legislative Director shall be NACVSO's lead legislative representative, who will interface with Members of Congress. Further, the Legislative Director shall be responsible for the drafting and presenting of all testimony, oral and written, position papers, and all promotional and informational materials, to include, handouts and brochures. Bylaws Article IV, Section 4.1

### **Term of Service**

The Legislative Director's term of office shall be at the discretion of the President.

### **Duties**

The Legislative Director shall be NACVSO's lead legislative representative

The Legislative Director shall be the main interface with Members of Congress

The Legislative Director shall be responsible for the drafting and presenting of all testimony, both oral and written

The Legislative Director shall be responsible for drafting and presenting all position papers

The Legislative Director shall be responsible for drafting and presenting all promotional and informational materials, handouts, and brochures

The Legislative Director shall plan, organize, and lead the annual Leadership Summit

The Legislative Director shall present NACVSO legislative policy, as approved by the Executive Board, at the Annual General Meeting

The Legislative Director shall present NACVSO legislative priorities at the NASDVA Fall Meeting

The Legislative Director shall work with the President, First Vice President, and Second Vice President as the joint legislative liaisons for NACVSO

The Legislative Director shall be the point of contact between NACVSO and all other Congressionally Chartered Veteran Service Organizations

The Legislative Director shall monitor all veteran related legislation proposed and submitted by Members of Congress

The Legislative Director shall give input, as approved by the President, on NACVSO's official position to Members of Congress

The Legislative Director shall provide updates at Executive Board Meetings, as required

The Legislative Director shall serve on and work with the NACo Military and Veterans Services Committee

### **Time Commitment**

The Legislative Director should be prepared to dedicate 25 hours per week

The Legislative Director should be prepared to spend thirty-five to forty (35-40) days away from local office

The Legislative Director shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; one (1) NASDVA Conferences; ten (10) trips to Washington, DC; other associated travel as may be required.

## **National Policy Director**

The National Policy Director shall be NACVSO's lead governmental agency liaison, who will interface with Executive Departments and Agencies. Further, the National Policy Director shall be responsible for assisting the Legislative Director in the drafting and presenting of all testimony, oral and written, position papers, and all promotional and informational materials, to include, handouts and brochures.

### **Term of Service**

The National Policy Director's term of office shall be at the discretion of the President.

### **Duties**

The National Policy Director shall be NACVSO's lead governmental agency liaison, who will interface with Executive Departments and Agencies

The National Policy Director shall be responsible for assisting the Legislative Director in the drafting and presenting of all testimony, both oral and written

The National Policy Director shall be responsible for assisting the Legislative Director in the drafting and presenting all position papers

The National Policy Director shall be responsible for assisting the Legislative Director in the drafting and presenting all promotional and informational materials, handouts, and brochures

The National Policy Director shall assist in the planning, organizing, and leading of the annual Leadership Summit

The National Policy Director shall give input, as approved by the President, on NACVSO's official position to Cabinet Secretaries and Undersecretaries

The National Policy Director shall present NACVSO goals, issues, and proposals presented to the Cabinet Secretaries and Undersecretaries, as approved by the Executive Board, at the Annual General Meeting

The National Policy Director shall work with the President, First Vice President, and Second Vice President on the development of NACVSO policy goals and proposals

The National Policy Director shall monitor the Federal Register for all proposed Policy and Regulation Changes impacting veterans

The National Policy Director shall provide updates at Executive Board Meetings, as required

The National Policy Director shall have oversight and delegable authority over the Washington Liaison positions

### **Time Commitment**

The National Policy Director should be prepared to dedicate 20-25 hours per week

The National Policy Director should be prepared to spend twenty-five to thirty (25-30) days away from local office

The National Policy Director shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; five (5) trips to Washington, DC; other associated travel as may be required.

## **Director of Education**

The Director of Education shall be NACVSO's lead educator. The Director of Education shall oversee all educational activities of NACVSO. The Director of Education shall be in charge of and direct the creation of all educational materials. The Director of Education shall plan, organize, and lead all educational endeavors, to include NACVSO Annual Conference. The Director of Education shall work with outside entities on increasing training opportunities for existing, new, and developing County Veteran Service Officer members.

### **Term of Service**

The Director of Education's term of office shall be an employed position at the direction of the President.

The employment and/or termination of the Director of Education shall be with the concurrence of the Executive Board

### **Duties**

The Director of Education shall be NACVSO's lead educator

The Director of Education shall oversee all educational activities of NACVSO

The Director of Education shall be in charge of and direct the creation of all educational materials

The Director of Education shall Chair the Education Committee

The Director of Education shall work with outside entities on increasing training opportunities for existing, new, and developing County Veteran Service Officer members

The Director of Education shall seek out current and emerging best practices to facilitate further development and expansion of NACVSO education opportunities

The Director of Education shall moderate the education classes, to include virtual and in person options

The Director of Education shall interface with Cabinet Departments to ensure Cabinet employees attend and present at NACVSO Annual Conference

The Director of Education shall periodically review and evaluate NACVSO training to ensure membership is receiving the most up-to-date and inclusive training

The Director of Education shall produce and evaluate education course critiques and implement appropriate changes based on member feedback

The Director of Education shall work with the NSD on the implementation and creation of the annual recertification examination

The Director of Education shall be responsible for recruitment, retention, and training of NACVSO Trainers

The Director of Education shall work with the Second Vice President in the development of training requirements

The Director of Education shall attend Executive Board Meetings and provide Educational Updates as required

**Time Commitment**

The Director of Education should be prepared to dedicate 30-40 hours per week

The Director of Education should be prepared to dedicate 20 days of travel time

The Director of Education shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; other associated travel as may be required.

## **Chaplain**

Chaplain shall be responsible for conducting the invocation and benediction during each session of the associations general business meeting. Bylaws Article IV, Section 4.1(A)

### **Terms of Service**

The Chaplain shall serve at the Discretion of the President

### **Duties**

The Chaplain shall be responsible for conducting the invocation and benediction during each session of the associations general business meeting

The Chaplain shall host a Prayer Breakfast at the Annual Conference

The Chaplain may provide ministry to membership, of all religious faiths, as required

The Chaplain shall help membership navigate difficult situations by offering encouragement and wise counsel

The Chaplain may provide reports and insights to the Executive Board as required

### **Time Commitment**

Time Commitment is contingent upon Chaplain availability and direction of the President

The Chaplain shall attend the Annual Conference, NACVSO Leadership Summit, and other associated travel as may be required.

### **Sergeant at Arms**

The Sergeant-at-Arms is responsible for maintaining order during the annual conference. The Sergeant-at-Arms and staff will monitor attendance at business meetings, help with such things as passing out and/or collecting materials, handling microphones, and other duties as assigned by the President. Bylaws Article IV, Section 4.1(G)

### **Terms of Service**

The Sergeant-at-Arms shall Serve at the Discretion of the President

### **Duties**

The Sergeant-at-Arms is responsible for maintaining order during the Leadership Summit and Annual Conference

The Sergeant-at-Arms and staff will monitor attendance at business meetings, help with such things as passing out and/or collecting materials, handling microphones, and other duties as assigned by the President

The Sergeant-at-Arms shall serve as the Flag Etiquette Individual, possessing the knowledge of flag display and procedures

The Sergeant-at-Arms shall ensure professional conduct of members and guests during the Leadership Summit and Annual Conference

The Sergeant-at-Arms shall work with the Director of Education, Legislative Director, and Executive Board Members on maintaining schedule of events

The Sergeant-at-Arms shall maintain security and ensure silence is maintained during the Legislative Summit and Annual Conference

### **Time Commitment**

The Sergeant-at-Arms should be prepared to dedicate 1-5 hours per week

The Sergeant-at-Arms should be prepared to spend five to ten (5-10) days away from local office

The Sergeant-at-Arms shall attend NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit.

## **Historian**

The Historian shall maintain a written and photographic record of the association and its works, functions, and meetings. This record may include any form of documentation deemed important by the Historian and may include pictures, videos, and/or audio recordings. Bylaws Article IV, Section 4.1(B)

### **Terms of Service**

The Historian shall Serve at the Discretion of the President

### **Duties**

The Historian shall maintain a written and photographic record of the association and its works, functions, and meetings. This record may include any form of documentation deemed important by the Historian and may include pictures, videos, and/or audio recordings

### **Time Commitment**

The Historian should be prepared to dedicate 1-2 hours per week

The Historian should be prepared to spend three to seven (3-7) days away from local office

The Historian may attend NACVSO Board Meetings and shall attend the Annual Conference.

## **Conference Director**

The Conference Director shall be an ex-officio member of the Executive Board. The duties of the Conference Director shall be: assist the host state in developing activities for the conference attendees and other actions required; act as the sole point of contact on behalf of NACVSO during the Leadership Summit and Annual Conference. Bylaws Article IV, Section 4.1(E)

## **Terms of Service**

The Conference Director shall be a 1099 Employee, reporting to the President and Executive Board

## **Duties**

The Conference Director shall be an ex-officio member of the Executive Board.

The Conference Director shall: assist the host state in developing activities for the conference attendees and other actions required; act as the sole point of contact on behalf of NACVSO during the Leadership Summit and Annual Conference

The Conference Director shall assist the President, First Vice President, Second Vice President, Legislative Director, National Policy Director, and any other Executive Board Members required to travel with lodging and accommodations if not being provided by the location or event travel is required for

The Conference Director shall interface with the host State and hotel of the Annual Conference to ensure membership is provided with accurate lodging and accommodations

The Conference Director shall conduct site survey visits of potential and future locations for the Leadership Summit and Annual Conference

The Conference Director shall act as NACVSO's Chief Negotiator on contracts involving locations, lodging, accommodations, and event venues

The Conference Director shall formulate a three (3) year plan for future Annual Conference locations and present the plan annually to the Executive Board

## **Time Commitment**

The Conference Director should be prepared to dedicate 20-30 hours per week

The Conference Director should be prepared to spend thirty to forty (30-40) days away from their office

The Conference Director shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; shall conduct site surveys of potential and future Annual Conference Locations; other associated travel as may be required.

## **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. Bylaws Article VI, Section 6.1

### **Terms of Service**

The Education Committee shall serve at the discretion of the President

### **Positions**

The Education Committee shall be chaired by the Director of Education

The Second Vice President shall be an ad hoc member of the Education Committee

All other members of the Education Committee shall be appointed by the President, to include the Content Manager, Senior Trainer, Lead Trainer, and CVA Coordinator

### **Duties**

Education Committee shall ensure 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.

Education Committee shall ensure CVSO's who attend annual conference are credited with satisfying their required annual CEU's, which will be reflected on the NACVSO website.

Education Committee shall maintain appropriate records concerning the training of all course attendees.

The Education Committee shall meet on a quarterly basis at a minimum

The Education Committee shall attend the annual conference and perform duties as required by the Director of Education and President

The Education Committee shall contribute to identifying topics, presenters, and the preparation of a training schedule for the annual conference.

The Education Committee shall conduct trainer Auditions during each Annual Conference. Only NACVSO members that have applied on the NACVSO Website and meet the prerequisites will be auditioned.

The Education Committee shall provide the President and their designee before the Annual Conference with adequate information and schedule to ensure Run of Show is provided in advance and in timely fashion

The Education Committee shall conduct an annual review of Trainers via a Peer to Peer Evaluation.

The Education Committee shall make recommendations for Trainers after review of the Peer-to-Peer Evaluation.

### **Time Commitment**

The Education Committee should be prepared to dedicate 1-2 hours per week

The Education Committee should be prepared to spend seven to ten (7-10) days away from local office

The Education Committee shall attend the Annual Conference.

### **Conference Committee**

The Conference Committee is responsible for organizing and planning the Annual Conference. The Committee is chaired by the Conference Director and is responsible for all bids, contract negotiations, site selections, and future site selections. The Conference Committee is answerable to the Executive Board. Bylaws Article VI, Section 6.2

### **Terms of Service**

The Conference Committee shall serve at the discretion of the President

### **Duties**

The Conference Director is the Chairperson of the Conference Committee.

The Executive Board's Delegate Liaison shall be appointed to the Committee.

The Committee shall create a place to check in delegates, distribute delegate materials, and prepare a count of states, delegates, voting members present, and the number of votes present at the conference.

The Committee shall receive all bids from states for hosting the Annual Conference.

The Committee shall review all presentations of prospective host states and provide a recommendation to the Executive Board regarding which state shall host the next and succeeding Annual Conferences

### **Time Commitment**

The Conference Committee should be prepared to dedicate 5-10 hours per week

The Conference Committee should be prepared to spend seven to fifteen (7-15) days away from their office

The Conference Committee shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; shall conduct site surveys of potential and future Annual Conference Locations as directed by the Conference Director; other associated travel as may be required.

## **Nominations Committee**

The nominating committee shall be appointed by the President in January. Chaired by the Immediate Past President, this committee is comprised of the four (4) NACVSO Executive Board members. They are charged with seeking nominations for all pertinent elected positions. The Nominations Committee is responsible for the recruitment and presentation of those eligible members who desire to run for elective office within the association. Bylaws Article VI, Section 6.3

### **Terms of Service**

The Nominations Committee shall serve the six months preceding and during the annual meeting

### **Duties**

The Chairperson of the Nominations Committee shall be the Immediate Past President. If for whatever reason, this individual is not available to serve, the Chairperson shall be the Judge Advocate.

The Nominations Committee shall be responsible for accepting nominations from membership

The Nominations Committee shall be responsible to conduct the election during the Annual Meeting

### **Time Commitment**

The Nominations Committee should be prepared to dedicate 1-2 hours per week

The Nominations Committee should be prepared to spend three to seven (3-7) days away from local office

The Nominations Committee may attend NACVSO Board Meetings and shall attend the Annual Conference.

### **Bylaws and Policy & Procedures Committee**

The Committee is chaired by the Judge Advocate and shall consist of two members appointed by the President. The Bylaws Committee shall act in accordance with the amendment procedures described in Article IX. Bylaws Article VI, Section 6.4

#### **Terms of Service**

The Judge Advocate shall Chair the Committee

#### **Duties**

The Chair shall review the proposed amendment from any voting member for form and content. Any voting member, as described in Article II, 2.1, Category 1-2, may submit a proposed Bylaws amendment to the Judge Advocate.

The Committee shall submit any proposed amendment to the Executive Board to allow the Board to attach a recommendation at the Annual Meeting.

The Judge Advocate shall cause such proposed amendments to be submitted to the general membership for review not later than 60 days prior to the next annual meeting.

The other two members of the Committee may be the First Vice President and the Immediate Past President

The Committee shall be charged with annually reviewing the Bylaws for accuracy and proper language

The Committee shall draft new Bylaw language and work with the General Counsel to ensure legal compliance

The Committee shall annually review the Policy and Procedures Manual to ensure accuracy, form, and substance

#### **Time Commitment**

The Committee should be prepared to dedicate 1-2 hours per week

The Committee shall attend NACVSO Board Meetings and the Annual Conference.

## **Finance Committee**

The Finance Committee is responsible for assisting the Treasurer in the formulation of the annual budget. It is responsible for causing an external audit of the association's financial records every year and formulating and supervising any fund-raising activities. The Treasurer is the Chairperson of the Finance Committee, and the Committee shall consist of the President, First Vice President, and Second Vice President. The Immediate Past President may serve as an advisory member to the Finance Committee. The Audit Committee will be a subcommittee of the Finance Committee. Bylaws Article VI, Section 6.5

### **Terms of Service**

The Treasurer shall serve on this Committee for the Duration of Term

### **Duties**

The Treasurer is the Chairperson of the Finance Committee

The President shall be a member of the Finance Committee

The First Vice President shall be a member of the Finance Committee

The Second Vice President shall be a member of the Finance Committee

The Immediate Past President may serve as an advisory member to the Finance Committee

The Treasurer shall present to the Finance Committee all expenditures and revenue received

The Audit Committee is a subcommittee of the Finance Committee

The Audit Committee will be composed of five appointees, four of whom will be appointed by each of the four Executive Board members with the Chairperson appointed by the President.

Each appointee will be approved by the Executive Board.

The Audit Committee will be appointed at the January Executive Board meeting.

Each term shall be for one year. Appointees may serve more than one term.

Audit Committee appointees must attend the Annual Conference

The Audit Committee Chair shall present to membership the results of the external audit at the Annual Conference

The Finance Committee is responsible for assisting the Treasurer in the formulation of the annual budget.

The Finance Committee is responsible for causing an external audit of the association's financial records every year and formulating and supervising any fund-raising activities.

The Finance Committee shall ensure that NACVSO maintains an accurate and complete financial record

The Finance Committee shall prepare and present accurate, timely, and meaningful financial statements to Executive Board

The Finance Committee shall oversee the establishment and monitoring of internal controls

The Finance Committee has a fiduciary duty to oversee all financial matters and ensure these measures are in line with NACVSO mission and vision

The Finance Committee shall review revenue and expenditures monthly

The Finance Committee shall report to the Executive Board any discrepancies or financial issues uncovered during the preceding month

The Finance Committee shall manage mission related costs and activities to ensure proper expenditures and planning for future operations

The Finance Committee shall create short- and long-term goals and strategies to achieve these goals

The Finance Committee shall establish a predetermined list of expectations to ensure employed and appointed positions have accurate time to prepare proper reports

The Finance Committee shall develop and maintain strong internal controls to mitigate risk, prevent fraud, and protect assets

The Finance Committee shall ensure internal controls for financial transactions are documented, followed, reviewed, and updated semi-annually

The Finance Committee shall be responsible for ensuring wealth management and growth of NACVSO assets and funds

The Finance Committee shall select external auditors and determine whether to use same auditors in subsequent years

The Finance Committee shall create plans and policies, oversee, and update investment policies to optimize earned revenue

The Finance Committee shall draft policies and procedures for placing excess operating cash into low-risk, short-term investments

The Audit Committee shall act in the critical role of providing oversight over and serving as a check and balance on NACVSO financial reporting

The Audit Committee shall provide oversight of the financial reporting process, the audit process, NACVSO's system of internal controls, and compliance with laws and regulations

The Audit Committee shall support the Finance Committee in fulfilling its governance and oversight responsibilities in relation to financial reporting, internal control structure, risk management systems, internal audit functions, and ethical accountability

The Audit Committee ensures that proper policies and processes are in place for the prevention and identification of fraud, such as asset misappropriation, corruption, and financial statement fraud

The Audit Committee works with the Executive Board to ensure that necessary steps are followed on the detection of fraud

The Audit Committee shall provide a written report to the membership at the Annual General Meeting

The Audit Committee shall report any discrepancies or irregularities to the President and Executive Board

The Audit Committee shall 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.

The Audit Committee shall verify that all deposits made during the year have been logged accurately and assigned to the proper budget category.

The Audit Committee shall 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.

The Audit Committee shall verify that IRS Form 990 and any state forms (incorporation renewal or state tax forms, for example) have been filed as necessary.

The Audit Committee shall 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.

The Audit Committee shall ensure the Treasurer and President are bonded or insured.

The Audit Committee shall ensure the Executive Board is insured.

### **Time Commitment**

The Finance Committee should be prepared to dedicate 1-2 hours per week

The Finance Committee shall attend NACVSO Board Meetings and shall attend the Annual Conference.

The Audit Committee shall attend the Annual Conference

## **Legislative Committee**

The Legislative Committee is responsible for bringing all legislative matters and issues to the attention of the President, Executive Board, and the general membership. These legislative matters may be either federal or state but must be relevant to the purpose of this association. Bylaws Article VI, Section 6.6

### **Terms of Service**

The Legislative Director shall serve as Chair of the Committee

The National Policy Director shall serve as a member of the Committee

The First Vice President shall serve as an ad hoc member of the Committee

The Second Vice President shall serve as an ad hoc member of the Committee

All other Committee Members shall Serve at the Discretion of the President

### **Duties**

The Legislative Director and the National Policy Director, along with the President and First Vice President and Second Vice President are NACVSO's official legislative interface

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

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 Leadership Summit and Annual Conference

The Legislative Committee shall monitor ongoing governmental operations, identify issues suitable for legislative review, gather and evaluate information, and recommend courses of action to the US House and US Senate

### **Time Commitment**

The Legislative Committee should be prepared to dedicate 6-10 hours per week

The Legislative Committee should be prepared to spend fifteen to twenty (15-20) days away from local office

The Legislative Committee shall attend NACVSO Conference Planning Board Meeting; NACVSO Board Meetings, the Annual Conference; NACVSO Leadership Summit; five (5) trips to Washington, DC; other associated travel as may be required.

## **Women's Veterans Issues Committee**

The Women Veterans Representative shall chair the Women Veterans Issues Committee. Committee Members shall be appointed by the President upon advice from the Women Veterans Representative. The Women Veterans Issues Committee shall provide specific information and assistance to Women Veterans. The Women Veterans Issues Committee shall be aware of and discuss eligibility for the wide variety of benefits through Federal, State, and Tribal agencies. Bylaws Article VI, Section 6.7

### **Terms of Service**

The Women Veterans Representative shall chair the Women Veterans Issues Committee.

Committee Members shall be appointed by the President upon advice from the Women Veterans Representative

### **Duties**

The Women Veterans Issues Committee shall be responsible for the planning of the Women Veterans Luncheon at the Annual Convention

The Women Veterans Issues Committee shall provide specific information and assistance to Women Veterans

The Women Veterans Issues Committee is the primary contact for Women Veterans within NACVSO

The Women Veterans Issues Committee shall raise awareness of the responsibility to treat Women Veterans with dignity and respect

The Women Veterans Issues Committee shall be aware of and discuss eligibility for the wide variety of benefits through Federal, State, and Tribal agencies

The Women Veterans Issues Committee shall identify and address trending issues that women veterans encounter and work with the NACVSO Legislative Committee to propose and lobby for legislative solutions

The Women Veterans Issues Committee shall have oversight and lead Women Veterans Committee and women Veterans committee meetings, frequency of the meetings at the position holder's discretion, but no less than quarterly, training, policy, membership, and budget

### **Time Commitment**

The Women Veterans Issues Committee should be prepared to dedicate 2-4 hours per week

The Women Veterans Issues Committee shall attend the Annual Conference.

## **Membership Committee**

The Membership Committee shall be chaired by a member of the Executive Board. This Committee is responsible for active membership programs and maintain membership records. Bylaws Article VI, Section 6.8

### **Terms of Service**

The Chair shall be one of the Executive Board Members and shall be appointed by the President

Members of the Committee shall be appointed by the President and serve at the discretion of the President

### **Duties**

The Membership Committee shall be chaired by a member of the Executive Board

The Membership Committee shall be responsible for active membership programs and maintain membership records

The Membership Committee shall work with the President and Executive Board on developing plans to increase membership

The Membership Committee shall be responsible for the welcoming of new member States and Tribes, facilitating onboarding, and encouraging participation of membership

The Membership Committee shall identify needs of the membership and make recommendations to the Executive Board to properly serve membership

The Membership Committee shall provide support and input on policies effecting and affecting membership

The Membership Committee shall promote understanding of NACVSO vision

### **Time Commitment**

The Membership Committee should be prepared to dedicate 4-5 hours per week

The Membership Committee shall attend the Annual Conference.

### **Scholarship Committee**

The Scholarship Committee shall oversee the annual scholarship funds and ensure the timely and fair disposition of scholarship funds. The Scholarship Committee accepts and reviews scholarship applications and selects applicants who each may receive a scholarship to the Annual Conference, Leadership Summit, or for the NACVSO Basic Benefits Course.

#### **Terms of Service**

The Chair shall be one of the Executive Board Members and shall be appointed by the President

Other Members of the Scholarship Committee shall be appointed by the President

#### **Duties**

The Scholarship Committee shall oversee the annual scholarship funds and ensure the timely and fair disposition of scholarship funds.

The Scholarship Committee accepts and reviews scholarship applications and selects at least three applicants who each may receive a scholarship to the Annual Conference.

The Scholarship Committee accepts and reviews scholarship applications and selects applicants who each may receive a scholarship to the Leadership Summit.

The Scholarship Committee accepts and reviews scholarship applications and selects applicants who may receive a scholarship to Basic Benefits.

The Scholarship Committee shall be charged with publicizing and soliciting applications and making decisions based on the applicant's responses

The Scholarship Committee is responsible for reviewing and recommending policies and guidelines to the Executive Board on the operation and funding of the scholarship program

#### **Time Commitment**

The Scholarship Committee should be prepared to dedicate 1-2 hours per week

The Scholarship Committee should be prepared to spend seven to ten (7-10) days away from local office

The Scholarship Committee shall attend the Annual Conference.

### **Delegate Liaison Committee**

The Delegate Liaison Committee shall develop the NACVSO Delegate Program to establish a single unified source of information for State Association Presidents and Delegates

#### **Terms of Service**

The Chair shall be one of the Executive Board Members who shall also serve as the Delegate Liaison. The Chair shall be appointed by the President

Other Members of the Delegate Liaison Committee shall be appointed by the President

#### **Duties**

The Delegate Liaison Committee shall develop the NACVSO Delegate Program to establish a single unified source information for State Association Presidents and Delegates

The Delegate Liaison Committee shall act as the main point of contact for State Association Presidents and Delegates for issues and suggestions

The Delegate Liaison Committee shall formulate for publication all information required to ensure maximum participation in the NACVSO Leadership Summit and Annual Conference

The Delegate Liaison Committee shall monitor all committee priorities and communicate to membership important and required updates on NACVSO activities

The Delegate Liaison Committee shall disseminate through communication on relevant information on NACVSO operations, future objectives, and important future plans

The Delegate Liaison Committee shall prepare and update listings on the NACVSO website that provide contact information for the separate State Association Presidents and Delegates

#### **Time Commitment**

The Delegate Liaison Committee should be prepared to dedicate 1-2 hours per week

The Delegate Liaison Committee should be prepared to spend three to seven (3-7) days away from local office

The Delegate Liaison Committee may attend the Leadership Summit and the Annual Conference.

### **Awards Committee**

The Awards Committee is responsible for identifying potential candidates deserving of recognition through receipt of NACVSO's Awards.

### **Terms of Service**

The Awards Committee is Chaired by the Second Vice President with four members appointed from the general membership by the President

### **Duties**

The Awards Committee is responsible for calling for nominations from the Association for the two awards presented annually by NACVSO.

The Awards Committee is responsible for reviewing the nominations for completeness, voting on the nominations, and providing the President with the awardees for both awards

Determinations on award recipients must be made by the Awards Committee no later than 60 days prior to either the Legislative Summit (LaValley Award) or Annual Conference (Knowles Award).

### **Time Commitment**

The Awards Committee should be prepared to dedicate 1-2 hours per week

# Enclosure II

National Association of County Veterans Service Officers (NACVSO)

Travel Expense Voucher

TRAVELER NAME:  
 TRAVEL PURPOSE:  
 DAYS:  
 DATES:  
 DAY OF WEEK:  
 FIRST DAY / LAST DAY:

TOTAL  
COSTS:

PER DIEM RATE:									
Per Diem %:	75%	100%	100%	100%	100%	100%	100%	100%	75%
Per Diem Location:									
GSA M&IE:									
Sub-total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
PER DIEM DEDUCTIONS:									
Breakfast:									
Lunch:									
Dinner:									
Sub-total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Net employee per diem:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

TRAVEL:									
PUBLIC TRANSPORTATION:									
Air or Rail:									
Taxi, Bus, Shuttle, or Metro:									
Rental Car:	\$ -								
Parking at Duty Location:	\$ -								
Sub-total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Paid by NACVSO Credit Card:									
Net employee cost:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

PRIVATELY OWNED VEHICLE:									
Excess* miles driven:									
Mileage payable:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Tolls:									
Parking (airport or train station):									
Sub-total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Paid by NACVSO Credit Card:									
Net employee cost:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

LODGING:									
Hotel:									
Other Lodging Expense**:									
Sub-Total:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Paid by NACVSO Credit Card:									
Net employee cost:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

OTHER:									
Other mission expense***:									\$ -
Paid by NACVSO Credit Card:									
Net employee cost:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL PAYABLE TO EMPLOYEE:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Submitted by:	Requested Payment:
	\$ -

TOTAL COST OF TRIP:
\$ -

Approved by:	Approved Payment:

NOTES:  
 \*Mileage over daily commute  
 \*\*Hotel internet fee, parking, etc.  
 \*\*\*Attach explanation or annotate receipt

# Enclosure III

NATIONAL ASSOCIATION OF COUNTY VETERAN SERVICE OFFICERS  
660 NORTH CAPITAL ST NW, SUITE 400  
WASHINGTON, DC 20001

## SCHOLARSHIP APPLICATION



Applying for: (CIRCLE ONE)

Annual Conference

or

Basic Benefits Course

Start Date \_\_\_\_\_

DATE OF APPLICATION: \_\_\_\_\_

FULL NAME (First, Last): \_\_\_\_\_

TITLE: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

WORK ADDRESS: \_\_\_\_\_

WORK PHONE (\_\_\_\_) \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

APPLICANTS' STATEMENT OF NEED – TELL US YOUR WHY?

---

---

---

---

PLEASE ANSWER THE FOLLOWING QUESTIONS TO ALLOW US TO RANK YOUR LEVEL OF NEED:

HAVE YOU EVER APPLIED FOR A SCHOLARSHIP IN THE PAST? YES OR NO

IF SO, DID YOU RECEIVE THE SCHOLARSHIP? YES OR NO

IF YES, WHAT YEAR? \_\_\_\_\_

ARE YOU A CURRENT AND PAID MEMBER: YES OR NO

HOW IS YOUR POSITION FUNDED: COUNTY OR STATE OR OTHER

IF OTHER, PLEASE EXPLAIN: \_\_\_\_\_

---

ARE YOU THE ONLY INDIVIDUAL IN YOUR AREA SERVING VETERANS? YES OR NO

ARE YOU A FULL OR PART-TIME EMPLOYEE: FULL OR PART-TIME

DO YOU HAVE A TRAINING BUDGET OR OTHER FUNDING AVAILABLE? YES OR NO

HOW MANY VETERANS DO YOU SERVE IN YOUR AREA? \_\_\_\_\_

ADDITIONAL COMMENTS YOU WOULD LIKE THE SCHOLARSHIP COMMITTEE TO KNOW:

---

---

APPLICANT'S SIGNATURE: \_\_\_\_\_

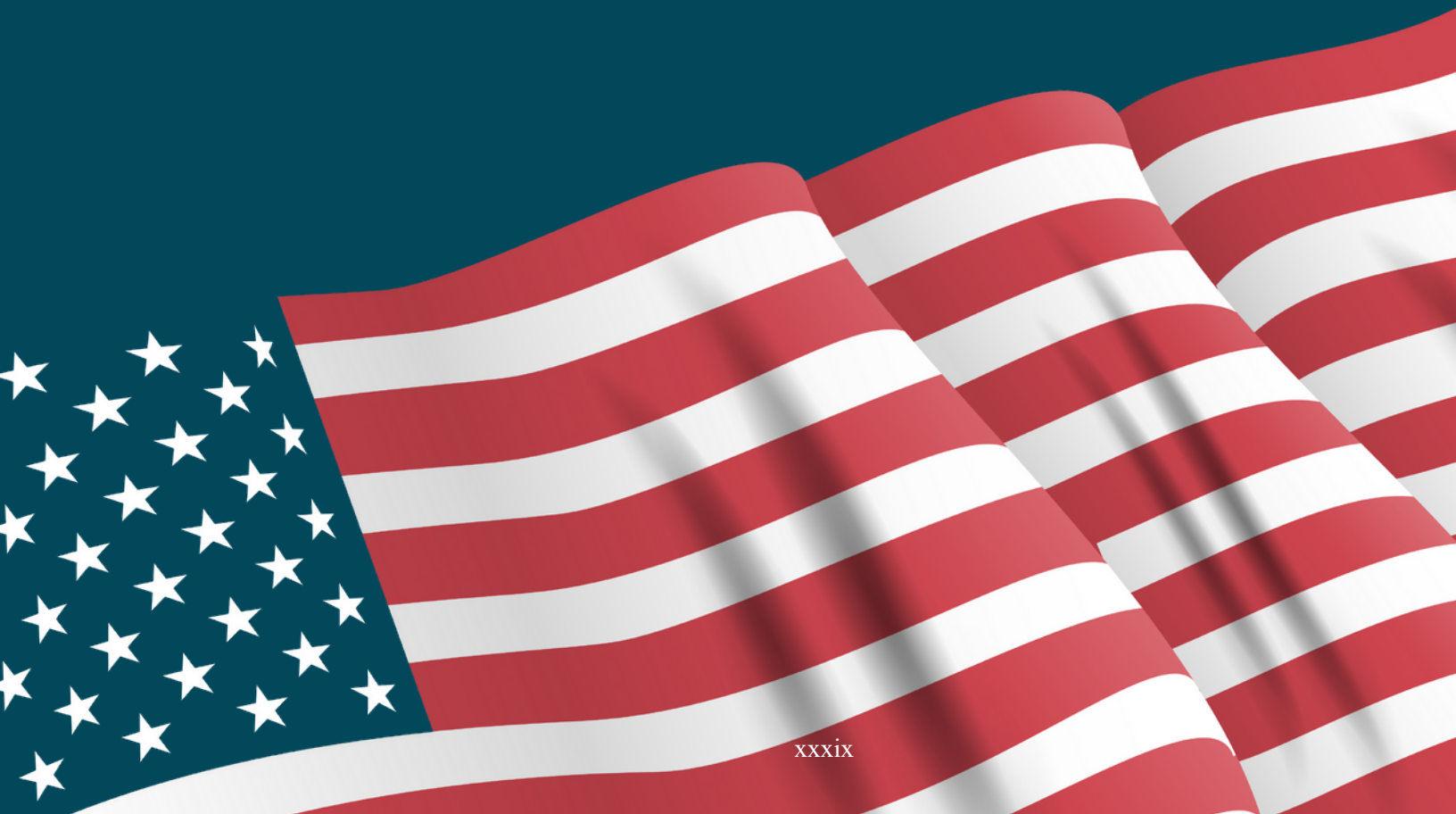
SUPERVISOR'S INFORMATION: (NAME) \_\_\_\_\_

(PHONE & EMAIL) \_\_\_\_\_

SUPERVISOR'S SIGNATURE: \_\_\_\_\_



# NACVSO 2024-2026 STRATEGIC PLAN





# OVERVIEW OF OBJECTIVES AND GOALS

*This comprehensive strategic plan outlines NACVSO's roadmap for the next 2 years, highlighting the organization's commitment to advancing the well-being of veterans and the professionalism of Veterans Service Officers across the United States. With continued attention and focus on these objectives, NACVSO aims to achieve its mission and vision.*

Objectives	Goals
<b>Membership Development:</b> Expand NACVSO membership in order to help all veteran service officers and veterans advocates better meet the needs of the veterans they serve.	<b>Goal 1:</b> Define, capture, and analyze membership information for membership engagement, support, and retention, in a centralized location <b>Goal 2:</b> Increase membership by 3% annually and increase membership engagement, support, and retention to increase NACVSO representation in every state
<b>Program Excellence:</b> Become the national standard for the training of veteran service officers and veteran advocates by delivering high quality/elite programs and services.	<b>Goal 1:</b> Complete a business case to support the hiring of a full-time staff to manage the education, training, and appeals programs <b>Goal 2:</b> Develop and publish the NACVSO Training Manual and SOP's <b>Goal 3:</b> Invest in trainer professional development and recruitment <b>Goal 4:</b> Develop a framework for measuring and evaluating training effectiveness across the spectrum of training and education services offered by NACVSO
<b>Legislative Influence:</b> Increase NACVSO's legislative influence on Capitol Hill in order to garner support for CVSOs and to promote the rights of veterans and their families.	<b>Goal 1:</b> Develop legislative priorities and present to Joint Congressional Veterans Affairs Committees annually <b>Goal 2:</b> Lead the advocacy in support legislation that directly impacts the profession and/or the veterans we serve <b>Goal 3:</b> Provide VA with recommendations to improve internal policies and processes that do not require congressional action
<b>Sustainable Financial Growth and Oversight:</b> The Executive Board effectively exercises its fiduciary responsibilities and ensures that all NACVSO programs and operations are fully funded.	<b>Goal 1:</b> Ensure that board members are prepared to perform strategic oversight and fiduciary duties, and establish and implement financial controls and policies that support the financial stability of NACVSO <b>Goal 2:</b> Ensure pricing structures for membership, training, and education support financial sustainability and growth



# 1. EXECUTIVE SUMMARY

## **NACVSO Overview**

For over three decades, the National Association of County Veteran Service Officers (NACVSO) has remained at the forefront of a noble mission — to empower and educate County, Tribal and Governmental Veteran Service Officers and advocates by equipping them with the knowledge and tools required to navigate the complex terrain of veterans' benefits and services offered by the U.S. Department of Veterans Affairs (VA). Established in 1989, NACVSO is now an established leader in the field, recognized for its passionate commitment to assisting our nation's veterans and their dependents.

NACVSO's journey is one of unwavering dedication and continuous evolution. While its roots are planted in the delivery of top-tier training and education to Veteran Service Officers, it has evolved into a multi-dimensional organization, advocating tirelessly for veterans and their advocates, and influencing policy that directly impacts those who served our nation in uniform. NACVSO's advocacy efforts continue to garner respect and recognition, making them one of the most respected voices in matters of legislative and VA policy.

Today, NACVSO boasts a robust community of over XXXX CVSO members across XX states and territories – and counting. Its strength and reach have positioned it for both operational stability and strategic expansion.

## **Strategic Planning Background**

In early 2019, the NACVSO Executive Board, Committee Chairs and dedicated staff initiated the organization's inaugural strategic planning process. This transformative process defined the organization's goals and actionable strategies and focused on two foundational points: the capacity to hire full-time staff and enhancement of the appeals representation process.

Despite the COVID-19 global pandemic, which presented historic uncertainty and risk to all organizations, NACVSO adapted to the ever-changing landscape for Veteran Service Organizations, even advancing the relevance of its mission. With innovation, determination, and a deep sense of purpose, NACVSO reinvented its approach to programming and internal operations during this time.

Today, NACVSO has an opportunity to continue its legacy of unwavering support for CVSO's in the revision of its strategic plan, to ensure that veterans and their families are better met with the care and benefits they deserve. This strategic plan is not just a roadmap for the future, it is a testament to NACVSO's dedication to the veterans it proudly serves.



## Mission Statement

NACVSO advocates for America's veterans. We work to ensure every veteran receives the benefits they have rightfully earned.

## Vision Statement

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

## Purpose Statement:

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



## 2. MEMBERSHIP DEVELOPMENT

*Expand NACVSO membership in order to help all veteran service officers and veterans advocates better meet the needs of the veterans they serve.*

### **Goal 1: Define, capture, and analyze membership information for membership engagement, support, and retention, in a centralized location**

- Action Items:
  - Define specific information to be captured for each member on the website (e.g., contact details, affiliations, accreditation status, cross accreditations, etc.)
- Owner of Action:
  - Membership Committee Chair and Executive Director
- Financial Impact: \$0; no new investment required
- Target Date:
  - December 2023

### **Goal 2: Increase membership by 3% annually and increase membership engagement, support, and retention to increase NACVSO representation in every state**

- Action Items:
  - Design and implement surveys aligned with ongoing strategic objectives
  - Develop an annual survey focused on membership satisfaction and feedback
  - Increase strategies for enhancing member engagement
- Owner of Action:
  - Membership Committee Chair
  - Membership Committee Chair
  - Executive Director
- Financial Expense: TBD – target (\$0-\$1,500)
- Target Date:
  - May 2024
  - February 2024
  - August 2024

xliii





# 3. PROGRAM EXCELLENCE

*Become the national standard for the training of veteran service officers and veteran advocates by delivering high quality/elite programs and services.*

## **Goal 1: Complete a business case to support the hiring of a full-time staff to manage the education, training, and appeals programs**

- Action Items:
  - Hire an external organization to conduct a business case in coordination with the Finance Committee
- Owner of Action: Finance Committee
- Financial Impact: TBD – target (\$2,500-\$4,000)
- Target Date: January 2024

## **Goal 2: Develop and publish the NACVSO Training Manual and SOP's**

- Action Items:
  - Map a curriculum that aligns with the career progression of County Veteran Service Officers (CVSOs) and addresses required accreditations
  - Develop curriculum for peripheral subjects of equal importance, such as government and leadership courses
  - Review, update and publish the NACVSO Training manual handbook
- Owner of Action: Director of Education and Executive Director
- Financial Impact:
  - TBD
  - \$0; no new investment required
  - \$0; no new investment required
- Target Date:
  - December 2024
  - December 2024
  - July 2024

## **Goal 3: Invest in trainer professional development and recruitment**

- Action Items:
  - Develop a strategy for increasing the number of trainers, including a standardized annual assessment of trainer qualifications
  - Create or utilize professional development content for trainers to enhance their skills and abilities, possibly offering virtual training certificates
  - Explore supportive positions/opportunities for trainers who may not directly teach but support the training team
  - Develop checklists and standard operating procedures (SOPs) regarding trainer expenses and equipment

- Owner of Action: Director of Education; co-owner Executive Director
- Financial Impact:
  - \$0; no new investment required
  - TBD
  - TBD
  - \$0; no new investment required
- Target Date:
  - August 2024
  - June 2025
  - February 2024
  - December 2024



#### **Goal 4: Develop a framework for measuring and evaluating training effectiveness across the spectrum of training and education services offered by NACVSO**

- Action Items:
  - Categorize current and future training offerings, define objectives and expected outcomes, incorporate and implement assessment tools, and define and establish Key Performance Indicators (KPIs)
  - Develop surveys that capture training effectiveness metrics in concert with attendee satisfaction rates (i.e. rates of new member accreditation, claim success rate, improved appeals, etc.)
  - Establish a timeline for semi-regular review and revision of training modules
- Owner of Action: Education Committee
- Financial Impact:
  - \$0; no new investment required
- Target Date:
  - December 2024



## 4. LEGISLATIVE INFLUENCE

*Increase NACVSO's legislative influence on Capitol Hill in order to garner support for CVSOs and to promote the rights of veterans and their families.*

### **Goal 1: Develop legislative priorities and present to Joint Congressional Veterans Affairs Committees annually**

- Action Items:
  - Establish a regular presence at the Joint Congressional Veterans Affairs Committees and ensure an annual invitation to present legislative priorities
  - Advocate for an increase in joint committee testimony time from 2 minutes to 5 minutes
  - Develop a formal and repeatable process for maintaining contact with congressional staff
  - Implement survey and data collection strategies to inform legislative and procedural policies
- Owner of Action: Legislative Director; Delegate Liaison
- Financial Impact: \$0; no new investment required
- Target Date:
  - December 2024
  - December 2024
  - February 2024

### **Goal 2: Lead the advocacy in support of legislation that directly impacts the profession and/or the veterans we serve**

- Action Items:
  - Collect county-specific data to highlight the impact of counties with CVSOs compared to those without, particularly in terms of pass-through constituent revenue
  - Proactively develop training programs to support the implementation of any new legislation
- Owner of Action:
  - Legislative Director and Executive Director
  - Legislative Director
  - Director of Education
- Financial Impact:
  - TBD
  - \$0; no new investment required
  - TBD
- Target Date:
  - June 2024
  - December 2024
  - TBD

### Goal 3: Provide VA with recommendations to improve internal policies and processes that do not require congressional action.

- Action Items:
  - Determine 3-5 NACVSO priority focus areas for collaboration with the Department of Veterans Affairs (VA) and develop implementation plans
- Owner of Action: Legislative Director and President or NSD
- Financial Impact: \$0; no new investment required
- Target Date: February 2024





# 5. FINANCIAL OVERSIGHT AND SUSTAINABLE GROWTH

*The Executive Board effectively exercises its fiduciary responsibilities and ensures that all NACVSO programs and operations are fully funded.*

## **Goal 1: Ensure that board members are prepared to perform strategic oversight and fiduciary duties, and establish and implement financial controls and policies that support the financial stability of NACVSO**

- Action Items:
  - Develop a comprehensive orientation process to ensure new board members are well-informed about NACVSO's operations, policies, and strategic objectives
  - Provide mentorship and support to new board members, fostering their engagement and effectiveness in fulfilling their roles
  - Develop and propose recommended internal financial control updates to be included in the NACVSO Policies and Procedures Manual (e.g., segregation of duties, monthly bank statement reconciliation, cash handling procedures, credit card use policies, income recording and review, control of the disbursement process, expense reimbursement review and approval, financial reporting, payroll and timesheet management, create and use budgets, conflict of interest policy, whistleblower policy, and banking account authority)
- Owner of Action: NACVSO President, NACVSO Treasurer & Executive Director
- Financial Impact: \$0; no new investment required
- Target Date: May 2024

## **Goal 2: Ensure pricing structures for membership, training, and education support financial sustainability and growth**

- Action Items:
  - Conduct a comprehensive review of current pricing structures for programs and services, including membership, training courses, and conference registration fees
  - Analyze the financial impact of current pricing on program and service operating costs
  - Develop a proposed 5-year pricing structure for membership, training courses, and conference registration fees that will generate sufficient revenue to cover ongoing program and service operating costs and investments required to implement the NACVSO strategic plan
- Owner of Action: Finance Committee
- Financial Impact: TBD – target (\$2,500-\$4,000)
- Target Date: Dec 2024

