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TO: Chapter Commanders and Adjutants
FROM: Dr. Carl Forkner
SUBJ: END OF FISCAL YEAR 2026 PLANNING
DATE: May 28, 2026

Chapter Commanders and Adjutants,

In just over a month, fiscal year 2026 will come to an end. With that comes some important reminders and tasks.

Annual Financial Reports (AFR)

1. These reports must be submitted ONLINE using the portal at mydav.org – paper, emailed, faxed, or snail mail will be rejected.
2. We all know that last year's reports turned into a bit of a nightmare scenario. While we cannot go back and get a do-over from the National Commander (since it is an administrative action and not a disciplinary one, revocation of privileges cannot be appealed), we can work to avoid further problems.
 - a. While NEC 4 applies to specific types of fundraising, the National Bylaws state that the main purpose for fundraising is service—that axiom applies to all fundraising activities.
 - b. As a rule of thumb, I see a minimum figure of 10% being a key when the AFR is reviewed—by Department and the National organization. I realize that some chapters expend far more than 10% toward free programs and services to Veterans and their dependents and survivors, which is greatly appreciated; however, we will not be approving fundraiser requests at the Department level unless at least 10% or the projected income is listed to go toward specific Veteran programs or services. There are spaces on the fundraiser request form to indicate that data.
 - c. If you have taken the advice of National HQ discussions, videos, training materials, etc., and have listened to our Department Treasurer and I over the past year, you should have been reconciling your income, expenditures, accounts, etc. monthly—which makes end-of-year reconciliation less burdensome as well as catching errors early rather than painfully going back over months of records to find that \$3.12 that doesn't reconcile on the AFR totals.
 - d. DO start the process of AFR preparation as early as you can; DON'T wait until September to start—by then, it is generally too late, especially if your AFR doesn't reconcile and you have to go back over a year's worth of records with limited time.

3. Department staff SHALL NOT do any AFRs for chapters. As put out last year, it is each chapter's responsibility to conduct their own financial review, audit, and online submission of the AFR. Remember—the AFR MUST be submitted by 2359 Eastern Time on September 30, 2026. The computer algorithm that has been programmed for the AFR at National HQ will automatically suspend any department or chapter that has not submitted their AFR by the required deadline.
 - a. According to the National Inspector General and National Adjutant & CEO, there WILL NOT be a one-month extension like was granted last fall.

Fundraising Requests

1. When submitting fundraising requests for FY2027, the following documents MUST be filed with the Department Adjutant before the requests will be submitted to the Finance Committee for approval:
 - a. The chapter's approved budget for FY2027
 - b. Minutes of the General Meeting where the membership approved the budget (it cannot just be approved by an Executive Committee—it must go to the body for approval).
 - c. The fundraiser request using the currently approved form for FY2027 (attached to the email). It is a fillable PDF to make it simpler to complete.
2. If your fundraising request is for \$4,999.99 or less, it may be approved by the Department Finance Committee. The FY2027 meeting dates currently scheduled for Finance Committee meetings are:
 - a. June 23, 2026
 - b. September 15, 2026
 - c. December 8, 2026
 - d. March 16, 2027
 - e. June 15, 2027
3. If the request is for \$5,000.00 or more, it must first be approved by the Finance Committee and then by the Department Executive Committee (DEC).
4. The lesson here...PLAN AHEAD...
5. For Chapters with associated DAVA Units: Remember that DAVA Units must get the Chapter Commander's approval for fundraisers. If the fundraiser is \$5,000.00 or more, it must come to Department and then follow the same process as with chapter requests.

Officer Election Reports

1. This is an easy one (I hope):
 - a. OERs must be submitted using the online function at mydav.org
 - b. OERs must be submitted within 10 *calendar* days of installation.
 - c. If officers change between elections, a new OER reflecting the changes must be submitted within 10 *calendar* days of the new officer's approval by the membership.
 - d. PLEASE do this on time...keep in mind that the National Commander, at the request of the National IG and/or National Adjutant & CEO, may suspend or revoke a chapter's charter for missing this deadline.
 - e. If your information populates wrong in the OER, the person with incorrect information has to go into their personal profile and update it. In the case of some information, you may have to email National Membership at membershipassistant@dav.org – Amber is always a great resource for membership, OER, and records issues.

Department Deadlines

1. Deadlines for submission of paperwork, nomination forms, convention registration, and other items are there for good reasons. We do not put them there arbitrarily. For example, it was put out at Mid-term Conference, again once in January, twice in February, and once in March that personal and company award forms were required to be submitted no later than April 1st. Nearly 2 months later, a couple chapters asked if it was too late—the answer is yes, it is too late. If it is due on the 1st, and it comes in on the 2nd, but you’ve had 2-3 months to work on it, you can bet that it will not be accepted. This applies to awards, conference or convention registration, CSO/DSO training nominations, “Intent to Run for Department Office” letters, etc., etc.
2. The FY2027 awards form is attached to this email. Again, it is an easy to complete fillable PDF.

Department Finances and Reimbursement Deadlines

1. Department positions (such as DECAs and District Liaisons) are able to receive compensation for some of their expenses incurred while performing their duties.
2. Department has the same accountability for completing an AFR each year with the same timeline as chapters—but with a CPA letter requirement added. That means we have a compressed timeline available for reconciling accounts, income and expenses, etc. in order for the CPA to have time to review the AFR and write their letter for us to submit by the September 30th deadline.
3. ACCORDINGLY, If you are in a position where you may receive compensation for expenses incurred as a result of your duties, such reimbursement requests **MUST BE RECEIVED AT DEPARTMENT BY JULY 10th OR THEY WILL NOT BE APPROVED!** This is because we have to close our books on FY2026 in order to do a final reconciliation and complete the Department’s AFR.
 - a. Starting on July 1st, the policy for filing for reimbursement of expenses will take effect each month—your reimbursement request, with applicable documentation (receipts, etc.) must be received by the 10th of the following month or it will not be paid. Unless an exception needs to occur due to extenuating circumstances (HINT: “I forgot to do it” is not an extenuating circumstance).

Department Assistance

1. Consider this a two-way street of sorts...
 - a. As Department Adjutant, I have three primary jobs: (1) support the chapters and membership to help them be successful, (2) be the intermediary (top cover, if you will) between the National Headquarters officers and staff and our chapters, and (3) execute the duties required by NEC 8 regarding ensuring compliance with the Constitution, Bylaws, and Regulations at the National, Department, and Chapter levels. The first job I like; the second one is usually OK; the third one I do not like to have to do, but I will when necessary or if ordered to take action by the Department Commander, National IG or Adjutant, or National Commander...but like I stated, it is not something I like to do...
 - b. This past year, I tried to remedy some of the things that I found to be missing, from 4 years as Chapter Adjutant, 3 years as Chapter Commander, and 3 years as Northern District Liaison.
 - i. First and foremost, I saw a need to enhance communications.
 1. First, communication from Department to the Chapters—Chapters should not have to constantly pull information out of Department that they should be getting without asking. That was the impetus for starting to send these memoranda with information or, for less formal and more brief

items, emails to the Chapter Commanders and Adjutants. I feel like there has been some success in that regard.

2. Second, communication from the Chapters to Department. While it has gotten somewhat better among some of the chapters, there are still often times when responses are either required or requested from the chapters and a number of chapters fail to respond. It is really a simple formula—in order for us to think ahead in how we may be able support chapters, we need to know what is going on and how they would like us to support them—after all remember that first job of mine? Please let me know how we can support you—push the information to us rather than us having to pull it out of you...
3. You know, we have a lot of good people across the state doing good things for the Veteran community. One of the things that really bothered me in getting prepared for the convention this year is the number of chapters who didn't put anyone in for an award—Appreciation Certificate, Disabled Veteran of the Year, Distinguished Service, Small Business or Large Business, or even making a pitch for their Commander or their Chapter to be Commander of the Year or Chapter of the Year, even though that is ultimately decided by the Department Commander. Even the Commander's Award for Excellence... Seriously, the awards cost exactly ZERO to the chapter but can mean the world to a volunteer! We will even be doing a Volunteer of the Year and Service Officer of the Year going forward—and I know that you have people who fit those categories...
4. Some people have busy schedules, I get that. For people like that who still want to participate when they are able, when we have big Department functions (such as Mid-Term Conference and Department Convention) we can always use a hand! A few [predictable] hours here and there, a day here and there, help at the event, etc.
5. The Department website. Yes, it had been down and out of date for about 3 years. This was due to reliance on outside people to manage things for us—and we were v-e-r-y low on their priority list. However, Glenn Hohman stepped up and set up a Department *Googleverse*, so to speak, preserving the ability to operate with our email, share drives, etc. Over the last three weeks, I rebuilt the website from scratch. It now has a cleaner look to it, less clutter, easier navigation, and—most importantly—we are managing it ourselves. Nearly every day I am adding or refining capabilities on the site.
 - a. By the time we get to our next Mid-term Conference, you will be able to get on the website, do your registration, get your tickets and receipt via your email, and pay right through the website—a one-stop shop.
 - b. Just two requests: (1) please be patient as things don't always work right the first time, and (2) if you have suggestions, PLEASE send them to me!
 - c. A new feature of the website is for each DAV chapter and DAVA unit to have a page where they can have their own news, information, pictures, stories, announcements, etc. posted. All you have to do, for the time being, is to email what you want on your page and it will be up within 48 hours... I will soon create a share drive where you can drop your files into a folder and I can grab them there and post them for you. [OK, before the question arise, no, I am not giving out administrator-level access to the website]

- ii. Automating conference and convention check-ins. Starting with the upcoming Department Convention, we are ditching the binders full of paper copies of chapter, department, and other entity registration information and doing check-ins using Excel spreadsheets in a collaborative cloud mode that allows both laptops to check people in without overwriting each other's data. We hope that will speed up the check-in process.
- iii. Availability. Even when I am out of town—or out of the country, for that matter—I am accessible. It may not be an immediate answer, I may only have email capability where I am at the time, but I can always be contacted. Yes. I even get the Wi-Fi when I fly (thank you American Airlines frequent Flyer levels). If necessary, I can get pretty much anywhere in Arizona within 5-6 hours, from Yuma to Nogales to Bullhead City to Page to Window Rock...I just need a little advance notice.
- c. Finances. As was said repeatedly over the past year, the Department Treasurer is available to assist you—all you need to do is ask. So am I. We have a lot of people—volunteers—who are filling Chapter Treasurer roles [or even Adjutant/Treasurer dual roles] who do not have a background in accounting, bookkeeping, auditing, etc. PLEASE let us come to help you with questions or problems before they become a crisis or so complex that it becomes extremely difficult to unravel.
 - i. Assist visits. Remember when you were serving and a big inspection was coming up? Usually, either your department head or commanding officer would ask your next higher command for an assist visit, to get a snapshot of how you were doing as you prepare for the upcoming inspection. No—LOL—we are not going to start doing inspections; however, we are always open to coming to your chapter and help you out, do a videoconference with you, etc. Seriously, we want to help!
- d. Department opportunities. We routinely have to campaign hard to get members to volunteer for Department offices and committees. If you want to dive into the deep end, you should consider running for a Department office next year (the deadline for letters of intent to run is passed for this convention). If you want to be a part of the Department's decision-making team, feel free to volunteer to serve on one of our many committees! Typically, the obligation for committees is no more than once a quarter. 😊

I know that some of you get tired of seeing these memoranda. I do them to help push important information and opportunities out to the chapters. 100% of each memorandum may not apply to your current situation—but it may in the future...

Sincerely,



Carl B. Forkner

cc: Department Officers
Department Staff