



**The  
Adjutant  
Training Handbook**

**Pennsylvania Training Instruction  
2023 – 2024**



**Veterans of Foreign Wars of  
the United States**

July 2023

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The Veterans of Foreign Wars closely follows military tradition. In the Army, the Adjutant is responsible for the administrative function of command, including all official correspondence and non-financial records.

### **Qualifications of a Post Adjutant**

You no doubt have dedication to the goals and objectives of the Veterans of Foreign Wars or you would not have assumed the position of Adjutant. You should become familiar with the history of the Veterans of Foreign Wars of the United States eligibility regulations and the current programs and services to our comrades.

No one ever reaches the point they know all there is to know about the Veterans of Foreign Wars of the United States and how it functions. The one constant thing in our fast-paced world is change. To do our jobs well, we must keep up with these changes and accept the responsibilities which they bring in their wake. This is particularly true of Post Adjutants.

The Post Adjutant is a conduit for information between the Post Commander and the members of the Post, as well as between the Post and the general public.

Effective communication skills are necessary to maintain a productive harmonious atmosphere among members and help to recruit new members.

### **Duties of the Post Adjutant**

The duties of the Post Adjutant are set forth Section 218 (a) (6) of the Manual of Procedure.

1. **Duty of Adjutant.** Among the duties of the Post Adjutant, he shall:
  - a. Under the direction of the Commander, prepare all reports and returns required of him.
  - b. Attest by his signature and the seal of the Post all official actions of the Post.
  - c. Keep in books or files properly prepared the following:
    1. Current By-Laws, Ritual and Manual of Procedure of the Veterans of Foreign Wars of the United States and copies of the By-Laws of the Post, Department, District and County Council.
    2. In a proper file, the original application of every member admitted to the Post.
    3. A record of all the proceedings of each meeting of the Post after the same shall have been corrected and approved.
    4. An order file in which shall be kept all orders or circulars issued by the Commander-in-Chief, the National Council of Administration, the Department Commander, the District and/or County Council Commander or the Post Commander.
    5. A letter or correspondence file.
    6. A file containing a copy of the proof of eligibility submitted by officers pursuant to Section 216(c).
    7. A roll of departed comrades.

- d. Transfer to his successor, without delay, all books, papers, records, monies and other records and property of the Post in his possession or under his control.
- e. Comply with and perform all duties required of him by the laws and usages of this organization, applicable By-Laws and orders from lawful authority and perform such other duties as are usually incident to such office.
- f. Unless authorized by the Post to remove books and records under his control from its facilities, all such books and records shall be kept at the Post facilities.

### **Duties of the District Adjutant.**

- a. Be the corresponding officer of the District, and shall keep a correct record of the minutes of each District meeting and each District Convention.
- b. Immediately after each District Convention, notify the Department Adjutant of the names and addresses of all elected and appointed officers.
- c. Maintain a file containing a copy of the proof of eligibility submitted by all District officers as prescribed by the Bylaws.

### **Tools of the Trade**

No craftsman worthy of the name would ever think of starting a job without the necessary tools. Your tools, as a Post Adjutant, should include the latest edition of the “Congressional Charter and By-Laws and Manual of Procedure and Ritual.” A Post Minutes Book to cover your term of office, post stationary, envelopes, and a computer with Internet access all are beneficial in efficiently performing the functions of your office. The Post seal should be available and used on official correspondence. Forms and other materials, as well as a wealth of information about the VFW are available at [www.vfw.org](http://www.vfw.org).

### **Application Cards**

The By-Laws require that the Post Adjutant should review the applications for completeness prior to presentation by the Commander. While it is the responsibility of the proposing member to have the application prepared correctly and the responsibility of the Reviewing Committee to verify it, the Post Adjutant should recheck all application cards before the Post acts on them.

### **Minutes**

One of your most important functions as a Post Adjutant will be to keep accurate minutes of Post meetings. You should use the official Post Minute Book available through the National Emblem and Supply Department.

Your minutes are the official records of your Post’s past meetings and the past transactions that make up your Post’s history; therefore, your diligence in keeping accurate minutes is important. It should include the actions of the Post from the Quartermaster’s report, the identity of the member making a motion and the actions taken on that motion, as well as other discussion topics. Proofread the minutes before submitting.

## **Communications**

The general orders and communications can sometimes be lengthy, but it is important to present an overview. Some call for action by the Post and others are for file and informational purposes only. Be careful to review all correspondence to ensure that any required action is taken.

## **Accurate Records & Good Housekeeping**

The Post looks to the Post Adjutant to keep the Post's house in order. The Adjutant is the executive officer of the Post and primary advisor to the Commander. You deserve the respect and the satisfaction derived from exemplarily accomplishing a critical mission.

### **Why do we take minutes?**

Let's look in our governing documents. Sec. 218 - Officers and Chairmen, Duties and Obligations. Adjutant. Among the duties of the Post Adjutant, the Adjutant shall be the official corresponding officer for the Post and shall attest to all official communications and reports with their signature.

The Post Adjutant shall maintain the following records:

1. A copy of the original application of every member admitted to the Post.
2. Minutes of each Post meeting after correction and approval.
3. What transpired during the meeting

## **Robert's Rules of Order NR Version 12 4 Structure of the Minutes**

The official record of the proceedings of a deliberative assembly is usually called the minutes, or sometimes—particularly in legislative bodies—the journal. The minutes should be kept in a substantial book or binder.

Minutes are arranged in four parts.

1. First Paragraph
2. Second Paragraph
3. The Body
4. Last Paragraph

**The first paragraph** of the minutes should contain the following information (which need not, however, be divided into numbered or separated items directly corresponding to those below):

1. the kind of meeting: regular, special, adjourned regular, or adjourned special;
2. the name and number of the post
3. the date and time of the meeting, and the place, if it is not always the same;
4. the fact that the Commander and adjutant were present or, in their absence, the names of the persons who substituted for them, a roll call of officers and whether they are present or excused

**The Second Paragraph** should state:

5. whether the minutes of the previous meeting were read and approved —as read, or as corrected—and the date of that meeting if it was other than a regular business meeting. Any correction approved by the assembly is made in the text of the minutes being approved; the minutes of the meeting making the correction merely state that the minutes were approved “as corrected,” without specifying what the correction was (see first paragraph of form, 48:8).

**The Body** of the minutes should contain a separate paragraph for each subject matter, and should show:

6. all main motions (10) or motions to bring a main question again before the assembly (6:25–27; 34–37) that were made or taken up— except, normally, any that were withdrawn<sup>3</sup>—stating:

- a. the wording in which each motion was adopted or otherwise disposed of (with the facts as to whether the motion may have been debated or amended before disposition being mentioned only parenthetically); and
- b. the disposition of the motion, including—if it was temporarily disposed of (9:7–11, 38:8)—any primary and secondary amendments and all adhering secondary motions that were then pending

7. secondary motions that were not lost or withdrawn, in cases where it is necessary to record them for completeness or clarity—for example, motions to Recess or to Fix the Time to Which to Adjourn (among the privileged motions), or motions to Suspend the Rules or grant a Request to Be Excused from a Duty (among the incidental motions), generally only alluding to the adoption of such motions, however, as “... the matter having been advanced in the agenda on motion of...” or “... a ballot vote having been ordered, the tellers...”;

8. the complete substance of oral committee reports that are permitted to be given in small assemblies in particular cases as provided in 51:60–62;

9. all notices of motions (10:44–51); all points of order and appeals, whether sustained or lost, together with the reasons given by the chair for his or her ruling; and the declaration by the chair in “naming” an offending member as a part of disciplinary procedures, as well as any disorderly words that led to such naming and that the chair directed the secretary to take down (see 61:12–14).

10. The Body The body of the minutes should contain a separate paragraph for each subject matter, and should show:

- Roll Call of Officers
- Membership applications and approval dis-approval
- Minutes (adjutant notes membership approval or corrections here)
- Quartermaster report

- Service Officer report
- Committee reports
- Unfinished business
- New business
- Nominations, elections and installation of officers
- \*The name and subject of a guest speaker can be given, but no effort should be made to summarize his remarks
- Good of the order. Normally you would not make any entries for the good of the order unless a resulting motion happened during this section.

11. Expenditure of funds. It is imperative that you log every motion that passes, using post funds.

Sec. 218 - Officers and Chairmen, Duties and Obligations. (a) Officers. (1) Commander. Among the duties of a Post Commander, the Commander shall: f. Approve all disbursements of funds properly authorized by the Post by use of voucher or payment order.

12. Last Paragraph The last paragraph should state:  
 a. the hour of adjournment.

- The Adjutant should sit near the presiding officer.
- Approved minutes are the official record of proceedings of a deliberative assembly.
- Minutes can be corrected years after they are approved.
- When corrections are made, the error should be bracketed, and the correction written on the facing page or in a wide margin.
- If a draft of the preceding meeting minutes are sent to all members, they need not be read unless requested.
- The minutes should contain mainly what was done, not what was said, in the meeting. • Do not include what did not occur in the meeting.

**Tips for the Adjutant**

- The name of the seconder should not be included unless ordered by the assembly. • Motions should be recorded exactly as adopted.
- If a motion is long or difficult to record requested that it be submitted in writing.
- The names of those elected or appointed to committees should be listed.
- Fact that the assembly went into a committee of the whole or quasi committee of the whole and the committee report, but not the proceedings.
- When a question is considered informally, the same information should be recorded in the minutes as under the regular rules.
- The assembly can order a complete committee report to be “entered in the minutes.”
- The name and subject of a guest speaker can be included in the minutes. Do not include a summary of the remarks.

- Number of votes on each side for a counted vote or a vote by ballot.
- Names of those voting on each side and those answering “Present” for a roll call vote.
- When the minutes have been approved, the word "Approved," with the Adjutant’s initials should be written below the minutes.
- The words, “Respectfully submitted,” represent an older and nonessential practice.

**Why are minutes important?**

In a rare instance minutes could be part of a court case. Let’s look at some examples of why minutes are imports and what can happen in the event the Post get taken to court.

**WHEN YOUR MINUTES GO TO COURT Big fat disclaimer!!!**

PURPOSE: The following presentation on minutes is not designed to make you a lawyer. It IS designed to make you a good adjutant and a good member. No legal advice is given but suggestions for best practices for taking, approving, and preserving minutes are made.

Knowing what may come later will help you prepare, approve, and keep the minutes properly.

MINUTES are the official record of the proceedings of a deliberative assembly. RONR. Black’s Law Dictionary defines minutes as “2. Parliamentary Law. The formal record of a deliberative assembly’s proceedings, approved (as corrected, if necessary) by the assembly.” Minutes are commonly needed by:

- Members -- Current or future members may wish to consult for historical reasons
- The press or scholars -- As the historical record, old minutes are often consulted
- Banks -- Several reasons, most common is to establish who has signature authority
- IRS -- to evaluate exercise of fiduciary duties and to determine if activities are within permitted scope for the entity. IRS regulations reference a “minute book” as showing activities and the “thinking and intent of those controlling the organization”
- Lawyers for preparing a case -- Minutes are used as an original source for every imaginable controversy.

**Why are minutes important?**

Reasons to admit minutes in a court case are to prove or disprove:

1. that a meeting was held on certain date
2. who was present
3. who presided
4. who took the minutes
5. that a quorum was present
6. that previous minutes were approved (or not)
7. that notice was given
8. results of election
9. delivery and acceptance of resignations



10. start of terms
11. what board members knew and when they knew it
12. an infraction resulting in a member being "named" in the minutes
13. results of roll call vote
14. disciplinary infractions and charges
15. making and resolving motions
16. who declared a conflict of interest
17. fact that proper voting thresholds were used
18. fact that proper parliamentary procedure was observed
19. fact that a contemporaneous objection was raised **WHEN YOUR MINUTES GO TO COURT**

### **RECOMMENDATIONS**

- >For the content, review your parliamentary authority carefully. RONR have outstanding examples of sample minutes.
- >Make a formal request for a lawyer in the organization's jurisdiction to give you a copy of statutes that apply. There may be statutory requirements beyond parliamentary us-age. For example, use of a corporate seal may be required.
- >Follow all rules of form. For example, sign and date, place in proper minute book, attach what you say is attached.
- >Consider digital signatures, pdfs, "draft" watermark, "page x of y" footers, storage solutions, both physical and cloud based.
- >If you are the adjutant, use as much care in distributing and saving minutes as you do in creating them.
- > Observe utmost honesty and integrity in taking minutes and in noting approval or corrections.

**BASIC DEFINITIONS:** Evidence is relevant when it has any tendency to make the fact that it is offered to prove or disprove either more or less probable.

Evidence is competent if the proof that is being offered is reliable. (Short layperson summary, "is it what it purports to be?")

Four types of evidence: real, demonstrative, testimonial, and documentary. Documentary evidence, such as minutes, does not walk into court and start talking. To admit such evidence, the lawyer will lay a foundation establishing that the evidence is relevant and competent and should be admitted.

Hearsay: a statement, other than one made by the declarant while testifying, offered in evidence to prove the truth of the matter asserted. Frequently used hearsay exceptions: business record, statement in ancient documents, statement against interest.

Business record exception: writings or records of acts, events, conditions, opinions, or diagnosis, made at or near the time by, or from information transmitted by, a person with knowledge are

admissible if kept in the regular course of business. Idea is that people are more truthful when it comes to the everyday activities of a business.

**I DEMAND TO SEE THE MINUTES!!!**

Who has access to the minutes?

Every member in good stand that is part of the organized group.

For instance, every member has access to a post meeting but not every committee.

It would be within their right to see the minutes from each meeting but not within their right to inspect the minutes from a committee that they are not on.

It is also well within the right of the adjutant to schedule a time for the member to review the minutes. A demand of “right now!” is unreasonable.

The record of a meeting and the job of the adjutant (recording secretary) is one of the most important jobs in the post. Accurate records will keep a post out of hot water.

*Veterans of Foreign Wars of the United States*

Department of Pennsylvania

(---) District

(Name), Commander

Counties of

(-----)

In accordance with the Veterans of Foreign Wars Manual of Procedures and Ritual, the 2nd yearly meeting of the

(----) District was called to order at (0000) hrs. on (Day, month, Year) by Commander (name). The meeting was held at VFW Post (location) Pennsylvania.

Did everyone sign in?

Please turn off or put your cell phones on vibrate.

**OPENING CEREMONY** - Conducted in due form.

**ROLL CALL:** Conducted by Adjutant (name) of all District Officers, Posts and Past District Commanders. Below are those that were present and/or accounted for:

- **District Officers Present:**
  
- **District Officers Absent:**
  
- **VFW Posts Present:**
  
- **VFW Post Absent:**
  
- **Past District Commanders Present:**
  
- **Department officers Present:**

**READ MINUTES OF LAST MEETING:**

**QUARTERMASTER'S REPORT:**

**Ways And Means Report:**

**CORRESPONDENCE:**

**SERVICE OFFICER REPORT:**

**COMRADES IN DISTRESS:**

.

**REPORT OF COMMITTEES:**

**Surgeon:**

**Citizenship:**

**Veterans and Military Support Programs:**

**Membership:**

**Legislative:**

**Hospital/Safety/Youth Activity:**

**Veterans Court:**

**Community Activity Reports:**

**Webmaster:**

**VAVS:**

**National Home:**

**Homeless Veterans:**

**Voice of Democracy (VOD)**

**Patriot's Pen:**

**REMEMBER OUR NATIONAL HOME**

**BILLS:** All bills pending and new bills to be presented.

**UNFINISHED BUSINESS:** All unfinished business and documented.

**NEW BUSINESS:** All unfinished business and documented.

**GOOD OF THE ORDER:** Anything to benefit the membership.

**CLOSING CEREMONY:**

The next (---) District Meeting will be held on (Day, Month, Year) at (0000) hours  
New Cumberland

**FOR THE COMMANDER**

Adjutant, (----) District  
Department of Pennsylvania

COPY: District Officers  
Post Commanders  
Past District Commanders  
File

**(Post Name)**  
**POST (Number)**

**POST MEETING MINUTES**

Commander (Name) opened the regular meeting of Post (Number) on (Date) at (0000) hours with the proper ceremonies.

**Roll Call of Officers:**

**Active Membership applications: Must be voted on.**

**Reading of the Minutes:** Must be voted on

**Correspondence:**

**Quartermaster's Report:** Must be voted on.

**Bills:**

**Service Officer:**

**Surgeon:**

**Comrades in Distress:**

**Committee Reports:**

**Membership:**

**Home Post:**

**Relief:**

**Poppy:**

**Publicity:**

**Youth activities:**

**House:**

**Americanism:**

**Ways and Means:**

**Community Service:**

**Safety:**

**Bingo:**

**National Home Prayer:**

**Unfinished Business:** All old business must be brought up.

**New Business:** All new business must be documented and voted on.

**Good of Order:** Anything that does benefit to the post.

There being no further business, the closing ceremonies were conducted in proper order and the meeting was adjourned by Commander (Name) at (0000) hours. The next meeting will be on (Day, Month, Year).

Respectfully submitted,

Post Adjutant

**(Name) VFW POST (Number) Home Association**  
**(Address of Canteen)**

President (Name) opened the canteen meeting on (Day, Month, Year) at (Time) with (Number) members present.

Roll call of officers.

Did everyone sign in?

Secretary (Name) read the minutes from the meeting of (Day, Month, Year).

The treasurer (Name) reads the following Active and Auxiliary applications for approval.

Minutes must reflect: Date of application - Name of member – Date of application – Must be voted on.

Treasurer (Name) read the following Social applications for approval.

Minutes must reflect: Date of application - Name of member – Date of application – Must be voted on.

The Canteen Treasurer (Name) gave a report on the canteen's finances.

Note any Home Association business that needs to be brought to the attention of the Post for further action.

There being no further business, the meeting adjourned at (Time).

APPROVED AS CORRECTED

(Name), RECORDING SECRETARY



The VFW Department of Pennsylvania recognizes that many VFW Posts operate a Canteen as a revenue source.

The Post is responsible for ensuring that the Canteen Home Association follows all necessary rules and regulations.

Many Post and Canteen issues can be prevented by a thorough knowledge and understanding of the following rules and regulations:

### **Pennsylvania Code Title 40 Chapter 5**

<https://www.pacodeandbulletin.gov/>

This is your resource to better understand the many requirements and obligations of a Cub.

Please review this very important document to ensure your Club / Canteen / Home Association is operating in compliance with the rules and regulations.

### **Subchapter F. CLUBS, RECORDS REQUIRED**

- [5.71.](#) Maintenance of records.
- [5.72.](#) Membership record.
- [5.73.](#) Financial records.
- [5.74.](#) Minute book.
- [5.75.](#) Other documents and instruments.

### **OTHER REQUIREMENTS**

- [5.81.](#) Constitution and bylaws.
- [5.82.](#) Food concession.
- [5.83.](#) Catering.
- [5.84.](#) Entrance and inside doorways.
- [5.85.](#) Inspection of clubhouse or club quarters.
- [5.86.](#) Permitted exchange of club and catering club licenses.

### **Subchapter G. CHANGE OF OFFICERS OF CORPORATIONS AND CLUBS**

### **Subchapter I. RESPONSIBLE ALCOHOL MANAGEMENT PROGRAM**

If your Canteen Home Association operates Small Games of Chance, these rules and regulations can be found at: <https://www.psp.pa.gov/LCE/Pages/Small-Games-of-Chance.aspx>  
Please note the reporting requirements as well.

Bingo Information: You will need to research the Bingo Law for your specific county.

Ensure that your Liquor License, Small Games of Chance License and Bingo License are renewed in a timely manner to avoid any interruptions of your operations.

## Document Retention

The following list has been compiled in response to requests from Posts that have asked how long to retain certain files and records. Please keep in mind that this list does not have the effect of law, and a judicious amount of common sense should be used when applying it to your Post.

<u><i>Record Name</i></u>	<u><i>Retention Period</i></u>
Accounts payable invoices	7 years
Accounts payable ledger	7 years
Accounts receivable ledger	7 years
Annual financial reports	Permanent
Annuity & deferred payment plans	Continuing record
Audit reports, annual	10 years
Audit reports, periodic	2 years
Audit work papers	5 years
Balance sheets	5 years
Bank deposit slips	5 years
Bank statements	5 years
Bills of lading	2 years
Bonds - Fidelity	3 years after termination
Bonds - Surety	3 years after termination
Budgets	5 years
Bylaws	Until superseded
Cancelled checks	7 years
Cash receipt records	7 years
Certified annual financial statements	Permanent
Community activity reports	3 years
Contracts	7 years after termination
Correspondence, executive	10 years
Correspondence, general	3 years
Depreciation schedules	Permanent
Election of Officer Reports	5 years
Employee records	4 years after termination
Employee contracts	7 years after termination
Employee withholding records	7 years
Employee accident reports	30 years after settlement
Employee insurance records	11 years after termination
Employee termination	7 years
Entertainment, gift & gratuity records	3 years
Expense vouchers	7 years
Fidelity bonds	3 years after termination

Financial reports, periodic	2 years
Financial reports, annual	Permanent
Freight bills	3 years
Freight claims	2 years
Garnishments	7 years after termination
General ledger	Permanent
Income statements, annual	Permanent 2 years
Income statements, periodic Incorporation papers	Permanent
Inspection reports	years
Insurance records, general Inventory records	years after Policy expiration
Labor Cost Records Lease Records	Permanent
Membership Applications	3 years
Membership Rosters	3 years after termination
Minutes of Post Meetings	Permanent ( <i>see note 1</i> )
Payroll register	5 years
Periodic financial reports	5 years ( <i>see note 2</i> )
Petty cash records Property records	7 years
Quartermaster Monthly & Quarterly Reports	years
Shipping & Receiving documents	years
Tax records	Permanent
Small Games of Chance Records	5 years
Unplayed tickets	2 years

*Note 1: Membership applications must be retained as a permanent record to aid in establishing length of membership, original eligibility, and other items of historical value.*

Note 2: In some instances, it may be advisable to retain the minutes of Post meetings when those minutes contain policy decisions. Normally, however, those policy decisions would have been incorporated into the Post Bylaws, and the minutes would only be of minor historical significance. Obviously, the foregoing list is not all-encompassing, nor is it intended to be. A good rule of thumb in determining what files and records to keep is that if the file or record has no financial or historical significance, then it is probably time to dispose of it.

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