

**Disabled American Veterans  
East Valley Chapter 8  
&  
Arizona East Valley  
Veterans Foundation**

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# **3-Year Business Plan 2024-2026**

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Approved by the Executive Committee on January 9, 2023

Approved by the membership at General Meeting on January 14, 2023



Commander

Presented by

**Carl Forkner**

**commander@azdav08.org**

January 14, 2023

# Executive Summary

## Objectives:

1. To fully fund operations for claims services and emergency financial assistance through June 30, 2026.
2. To maintain a cadre of at least 8 fully qualified Chapter Service officers to provide claims services to Veterans, their families, and their survivors.
3. To represent the Chapter each year at Department Convention, Department Midterm Conference, National Convention, and National Mid-Winter Conference.
4. To refinish or replace Chapter building flooring by the end of FY 2023.
5. To replace the Chapter front door with an ADA-friendly entry by the end of FY 2023.
6. To erect a Gold Star Mothers memorial by the end of FY 2024.
7. To provide a Chapter item (x3,000) for National Convention in Phoenix in August 2024 (FY 2025).
8. To build the Payson satellite office into a new Chapter by the end of FY 2026.

## Unique Selling Point:

The Chapter prides itself on being the premier organization for providing VA claims services to Veterans, their families, and their survivors. The Chapter has the highest number of Level II Chapter Service Officers and facilitates more VA claims than any other DAV Chapter in Arizona.

## About Us

We are dedicated to a single purpose: empowering veterans to lead high-quality lives with respect and dignity. We accomplish this by ensuring that veterans and their families can access the full range of benefits available to them; fighting for the interests of America's injured heroes on Capitol Hill; and educating the public about the great sacrifices and needs of veterans transitioning back to civilian life.

This mission is carried forward by:

- Providing free, professional assistance to veterans and their families in obtaining benefits and services earned through military service and provided by the Department of Veterans Affairs (VA) and other agencies of government.

- Providing outreach concerning its program services to the community generally, and to disabled veterans and their families specifically.
- Representing the interests of disabled veterans, their families, their widowed spouses, and their orphans before state and local government.
- Extending DAV's mission of hope into the communities where these veterans and their families live through a network of Veterans organizations.
- Providing a structure through which disabled veterans can express their compassion for their fellow veterans through a variety of volunteer programs.

## Services

Many Veterans are not aware that they can be compensated for service-connected problems that they may have may result in them receiving compensation. Our highly trained Chapter Service Officers (CSOs) can help you with your service-connected claims with the VA. They can advise you on what service-connected conditions you may qualify for, how to get the necessary evidence, navigate the complicated VA system for compensation claims, and help fill out the necessary claims forms for you.

Trained and certified Chapter Service Officers prepare and file Veterans' applications for service-connected disabilities or pensions, including (but not limited to):

- Aid and attendance for severely ill or disabled. The attendant may be your spouse or another person.
- Pensions for Veterans whose income falls below specified levels.
- Filing for enrollment in the VA Health Care System.
- Filing for additional compensation for dependents, including parents, spouse, and children.
- Application for burial benefits.
- Application for compensation, surviving spouse pension, Dependency Indemnity Compensation (DIC), and accrued benefits.
- Veterans' application for Individual Unemployability.

## Target Market

The Chapter focuses on Central Arizona's East Valley. This is defined as the 101 Loop eastern loop eastward to 30 miles east of Globe, AZ, and from Chandler north to Fountain Hills. Fundraising, in terms of grants, will target corporations with local presence that may also have locations outside the Phoenix metropolitan area.

## Collaboration and Coordination

These are the organization with which DAV East Valley Chapter 8 conducts collaboration and coordination:

Office of Senator Kyrsten Sinema

Office of Congressman Andy Biggs

Office of Congressman Greg Stanton

Mesa Veterans Resource Center (MVRC), Mesa, AZ

Mesa Veterans Program (Mesa Chamber of Commerce), Mesa, AZ

United Way, Mesa, AZ

Veterans Affinity

Resurrection Street Ministry, Mesa, AZ

Operation Shockwave, Chandler, AZ

American Legion Post 26, Mesa, AZ

Veterans of Foreign Wars Post 1760, Mesa, AZ

Vietnam Veterans of America Chapter 1011, Mesa, AZ

Grace United Methodist Church, Mesa, AZ

Disabled American Veterans Department of Arizona, Phoenix, AZ

Disabled American Veterans Chapter 1, Phoenix, AZ

Disabled American Veterans Chapter 20, Glendale, AZ

Disabled American Veterans Chapter 24, Surprise, AZ

Mariposa Gardens Cemetery, Mesa, AZ

Mesa Multigenerational Center, Mesa, AZ

The Boeing Company, Mesa, AZ

## SWOT Analysis

<b>METRICS</b>	<b>Continued Operations</b>	<b>Funding</b>
<b>Strengths</b>	Chapter Service Officers	Consistent Funding from National
<b>Weaknesses</b>	Limited Building Space Limited Volunteer Staff	Limited Income Sources Limited Volunteer Staff
<b>Opportunities</b>	Participation in Civic Events	Local, Regional, National Grants
<b>Threats</b>	Loss of Volunteer Staff	Reduction in Grant Opportunities Competition for Grant Funding

## Operational Plan

The Chapter will center its operations at 655 N. Gilbert Road, Mesa, Arizona 85203, which is surrounded primarily by residential neighborhoods. The staff will consist of:

Commander	Executive Committee
Senior Vice Commander	Board of Trustees
Junior Vice Commander	Audit Committee
Adjutant	Constitution & Bylaws Committee
Treasurer	Fundraising & Events Committee
Chapter Service Officers (CSO)	Finance Committee
Receptionist/Scheduler	Special Projects Committee
	Gold Star 2024 Committee

The primary operations of DAV East Valley Chapter 8 are centered on counseling on and completion of claims paperwork for Veterans Administration (VA) disability compensation. This is accomplished by operations from Monday through Friday from 0900 to 1400 and the third Saturday of the month from 0900-1200. Trained and qualified Chapter Service Officers review and compile claims for VA disability compensation during those hours.

The primary operations of the Arizona East Valley Veterans Foundation are centered on emergency financial assistance to Veterans for rent, utility payments, and transportation (fuel cards). Such requests are screened and approved by the Commander or Adjutant of DAV East Valley Chapter 8, acting as President and Secretary of the Foundation, respectively.

# FY 2024 Budget

## GENERAL ACCOUNT

<u>Expenses</u>	<u>Amount</u>	<u>vs. FY2023</u>
<b>Awards &amp; Citations</b>	\$ 900.00	--
<b>Bills &amp; Utilities</b>	\$ 15,000.00	+1,000
<b>Building/Property Maintenance</b>	\$ 15,700.00	+100
Building Maintenance	\$ 10,000.00	--
Grounds Maintenance	\$ 1,800.00	--
Property Taxes	\$ 3,900.00	+100
<b>Commander's Discretionary Fund</b>	\$ 500.00	--
<b>Chapter Insurance</b>	\$ 1,300.00	--
<b>Conventions and Conferences</b>	\$ 6,700.00	+1,300
State Convention 2024	\$ 500.00	-1,000
National Convention 2023	\$ 3,000.00	+1,200
Mid-Winter Conference 2024 (Wash DC)	\$ 1,800.00	--
Officer Installation	\$ 1,100.00	+1,000
CSO Training	\$ 300.00	+100
<b>Flag Expenses</b>	\$ 300.00	--
<b>Fundraising Expenses</b>	\$ 21,350.00	+11,850
Gold Star Memorial	\$ 10,000.00	+10,000
Golf Tournament	\$ 10,000.00	+2,000
Honor Wall Project	\$ 1,000.00	--
Display Case Sales	\$ 250.00	-250
Miniature Flags	\$ 100.00	+100
<b>Hall of Fame</b>	\$ 100.00	--
<b>Historian</b>	\$ 50.00	--
<b>Memorial Fund</b>	\$ 300.00	--
<b>Office Expenses</b>	\$ 5,100.00	+3,100
Consumable Office Supplies	\$ 1,300.00	+1,000
Subscriptions and Fees	\$ 1,400.00	+1,000
Computer Equipment and Software	\$ 1,600.00	+1,000
Copier/Computer Supplies/Maintenance	\$ 500.00	--
Business Cards	\$ 300.00	+100
<b>Parades</b>	\$ 1,000.00	--
East Valley Veterans Day Parade	\$ 1,000.00	--
Other Parades	\$ -	--
<b>Petty Cash</b>	\$ 100.00	--
<b>Postage &amp; Delivery</b>	\$ 980.00	+100
Stamps.com Refill	\$ 600.00	+100
Stamps.com Monthly Fee	\$ 180.00	--
Envelopes & Labels	\$ 200.00	--
<b>Public Information</b>	\$ 250.00	--

<b>Chapter Operations</b>	<b>\$ 2,200.00</b>	<b>+200</b>
Hall Rental	\$ 1,000.00	--
Chapter Entertainment (Holiday Party)	\$ 1,200.00	+200
<b>TOTAL GENERAL ACCOUNT EXPENSES:</b>	<b>\$ 71,830.00</b>	
<b>SERVICE ACCOUNT</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Service Reimbursement</b>	<b>\$ 12,000.00</b>	<b>+4,500</b>
CSO & Outreach Mileage	\$ 12,000.00	+4,500
<b>TOTAL SERVICE ACCOUNT EXPENSES:</b>	<b>\$ 12,000.00</b>	
<b>FOUNDATION</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Special Projects</b>	<b>\$ 32,000.00</b>	<b>+1,000</b>
Rent Assistance	included	
Utility Assistance	included	
Transportation Assistance	included	
Fuel Cards Purchased	\$ 2,000.00	+1,000
<b>TOTAL FOUNDATION EXPENSES:</b>	<b>\$ 32,000.00</b>	
<b>TOTAL EXPENSES FY 2024:</b>	<b>\$ 115,830.00</b>	<b>+33,150</b>

**INCOME**

<u>Income</u>	<u>Amount</u>	
<b>Fundraising</b>	<b>\$ 34,850.00</b>	<b>+12,500</b>
Gold Star Memorial	\$ 10,000.00	+10,000
Golf Tournament	\$ 22,500.00	+2,500
Honor Wall Project	\$ 1,500.00	--
Display Case Sales	\$ 250.00	--
50/50 at General Meetings	\$ 600.00	--
<b>Membership Dividend</b>	<b>\$ 9,000.00</b>	<b>+200</b>
From DAV National	\$ 9,000.00	+200
<b>Donations</b>	<b>\$ 15,000.00</b>	<b>+2,000</b>
<b>Grants</b>	<b>\$ 80,000.00</b>	<b>+36,000</b>
AZDVS Small Grants	\$ 10,000.00	--
AZDVS Large Grant	\$ 60,000.00	+8,000
Sundt Foundation Grant	\$ 10,000.00	+8,000
Misc. other grants	\$ 20,000.00	+20,000
<b>TOTAL INCOME FY 2024:</b>	<b>\$ 138,850.00</b>	<b>+30,700</b>



# FY 2025 Budget

## GENERAL ACCOUNT

<u>Expenses</u>	<u>Amount</u>	<u>vs. 2024</u>
<b>Awards &amp; Citations</b>	\$ 900.00	--
<b>Bills &amp; Utilities</b>	\$ 16,000.00	+1,000
<b>Building/Property Maintenance</b>	\$ 15,800.00	-9,900
Building Maintenance	\$ 10,000.00	--
Grounds Maintenance	\$ 1,800.00	--
Property Taxes	\$ 4,000.00	+100
<b>Commander's Discretionary Fund</b>	\$ 500.00	--
<b>Chapter Insurance</b>	\$ 1,400.00	+100
<b>Conventions and Conferences</b>	\$ 5,600.00	-1,100
State Convention 2025	\$ 500.00	--
National Convention 2024	\$ 2,000.00	-1,000
Mid-Winter Conference 2025 (Wash DC)	\$ 1,800.00	--
Officer Installation	\$ 1,100.00	--
CSO Training	\$ 200.00	+100
<b>Flag Expenses</b>	\$ 300.00	--
<b>Fundraising Expenses</b>	\$ 10,850.00	-10,150
-	\$ -	
Golf Tournament	\$ 10,000.00	--
Honor Wall Project	\$ 500.00	-500
Display Case Sales	\$ 250.00	--
Miniature Flags	\$ 100.00	--
<b>Hall of Fame</b>	\$ 100.00	--
<b>Historian</b>	\$ 50.00	--
<b>Memorial Fund</b>	\$ 300.00	--
<b>Office Expenses</b>	\$ 5,000.00	-1000
Consumable Office Supplies	\$ 1,300.00	--
Subscriptions and Fees	\$ 1,400.00	--
Computer Equipment and Software	\$ 1,600.00	--
Copier/Computer Supplies/Maintenance	\$ 500.00	--
Business Cards	\$ 200.00	-100
<b>Parades</b>	\$ 1,000.00	--
East Valley Veterans Day Parade	\$ 1,000.00	--
Other Parades	\$ -	--
<b>Petty Cash</b>	\$ 100.00	--
<b>Postage &amp; Delivery</b>	\$ 880.00	-100
Stamps.com Refill	\$ 500.00	-100
Stamps.com Monthly Fee	\$ 180.00	--
Envelopes & Labels	\$ 200.00	--
<b>Public Information</b>	\$ 250.00	--

<b>Chapter Operations</b>	<b>\$ 2,200.00</b>	--
Hall Rental	\$ 1,000.00	--
Chapter Entertainment (Holiday Party)	\$ 1,200.00	--
<b>TOTAL GENERAL ACCOUNT EXPENSES:</b>	<b>\$ 61,230.00</b>	<b>-10,600</b>
 <b>SERVICE ACCOUNT</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Service Reimbursement</b>	<b>\$ 12,000.00</b>	--
CSO & Outreach Mileage	\$ 12,000.00	--
<b>TOTAL SERVICE ACCOUNT EXPENSES:</b>	<b>\$ 12,000.00</b>	--
 <b>FOUNDATION</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Special Projects</b>	<b>\$ 32,000.00</b>	--
Rent Assistance	included	
Utility Assistance	included	
Transportation Assistance	included	
Fuel Cards Purchased	\$ 2,000.00	--
<b>TOTAL FOUNDATION EXPENSES:</b>	<b>\$ 32,000.00</b>	--
 <b>TOTAL EXPENSES FY 2025:</b>	 <b>\$ 105,230.00</b>	 <b>-10,600</b>

**INCOME**

<u>Income</u>	<u>Amount</u>	
<b>Fundraising</b>	<b>\$ 25,850.00</b>	<b>-9,000</b>
-	\$ -	
Golf Tournament	\$ 22,000.00	-500
Honor Wall Project	\$ 1,000.00	-500
Display Case Sales	\$ 250.00	--
50/50 at General Meetings	\$ 600.00	--
<b>Membership Dividend</b>	<b>\$ 9,100.00</b>	<b>+100</b>
From DAV National	\$ 9,100.00	+100
<b>Donations</b>	<b>\$ 13,000.00</b>	<b>-2,000</b>
<b>Grants</b>	<b>\$ 90,000.00</b>	
AZDVS Small Grants	\$ 10,000.00	
AZDVS Large Grant	\$ 50,000.00	
Sundt Grant	\$ 10,000.00	
TBD Grant	\$ 20,000.00	
<b>TOTAL INCOME FY 2025:</b>	<b>\$ 137,950.00</b>	<b>-20,900</b>

# FY 2026 Budget

## GENERAL ACCOUNT

<u>Expenses</u>	<u>Amount</u>	<u>vs. 2025</u>
<b>Awards &amp; Citations</b>	\$ 900.00	--
<b>Bills &amp; Utilities</b>	\$ 16,000.00	--
<b>Building/Property Maintenance</b>	\$ 15,800.00	--
Building Maintenance	\$ 10,000.00	--
Grounds Maintenance	\$ 1,800.00	--
Property Taxes	\$ 4,000.00	--
<b>Commander's Discretionary Fund</b>	\$ 500.00	--
<b>Chapter Insurance</b>	\$ 1,400.00	--
<b>Conventions and Conferences</b>	\$ 6,600.00	+1,000
State Convention 2026	\$ 500.00	--
National Convention 2025	\$ 3,000.00	+1,000
Mid-Winter Conference 2026 (Wash DC)	\$ 1,800.00	--
Officer Installation	\$ 1,100.00	--
CSO Training	\$ 200.00	--
<b>Flag Expenses</b>	\$ 300.00	--
<b>Fundraising Expenses</b>	\$ 10,850.00	--
-	\$ -	--
Golf Tournament	\$ 10,000.00	--
Honor Wall Project	\$ 500.00	--
Display Case Sales	\$ 250.00	--
Miniature Flags	\$ 100.00	--
<b>Hall of Fame</b>	\$ 100.00	--
<b>Historian</b>	\$ 50.00	--
<b>Memorial Fund</b>	\$ 300.00	--
<b>Office Expenses</b>	\$ 5,000.00	--
Consumable Office Supplies	\$ 1,300.00	--
Subscriptions and Fees	\$ 1,400.00	--
Computer Equipment and Software	\$ 1,600.00	--
Copier/Computer Supplies/Maintenance	\$ 500.00	--
Business Cards	\$ 200.00	--
<b>Parades</b>	\$ 1,000.00	--
East Valley Veterans Day Parade	\$ 1,000.00	--
Other Parades	\$ -	--
<b>Petty Cash</b>	\$ 100.00	--
<b>Postage &amp; Delivery</b>	\$ 980.00	+100
Stamps.com Refill	\$ 600.00	+100
Stamps.com Monthly Fee	\$ 180.00	--
Envelopes & Labels	\$ 200.00	--
<b>Public Information</b>	\$ 250.00	--

<b>Chapter Operations</b>	<b>\$ 2,200.00</b>	<b>--</b>
Hall Rental	\$ 1,000.00	--
Chapter Entertainment (Holiday Party)	\$ 1,200.00	--
<b>TOTAL GENERAL ACCOUNT EXPENSES:</b>	<b>\$ 72,330.00</b>	<b>+1,100</b>
 <b>SERVICE ACCOUNT</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Service Reimbursement</b>	<b>\$ 12,000.00</b>	<b>--</b>
CSO & Outreach Mileage	\$ 12,000.00	--
<b>TOTAL SERVICE ACCOUNT EXPENSES:</b>	<b>\$ 12,000.00</b>	<b>--</b>
 <b>FOUNDATION</b>		
<u>Expenses</u>	<u>Amount</u>	
<b>Special Projects</b>	<b>\$ 32,000.00</b>	<b>--</b>
Rent Assistance	included	
Utility Assistance	included	
Transportation Assistance	included	
Fuel Cards Purchased	\$ 2,000.00	--
<b>TOTAL FOUNDATION EXPENSES:</b>	<b>\$ 32,000.00</b>	<b>--</b>
 <b>TOTAL EXPENSES FY 2026:</b>	 <b>\$ 116,330.00</b>	 <b>+1,100</b>

**INCOME**

<u>Income</u>	<u>Amount</u>	
<b>Fundraising</b>	<b>\$ 25,850.00</b>	--
-	\$ -	
Golf Tournament	\$ 22,000.00	--
Honor Wall Project	\$ 3,000.00	--
Display Case Sales	\$ 250.00	--
50/50 at General Meetings	\$ 600.00	--
<b>Membership Dividend</b>	<b>\$ 9,100.00</b>	<b>+200</b>
From DAV National	\$ 9,100.00	+200
<b>Donations</b>	<b>\$ 13,000.00</b>	--
<b>Grants</b>	<b>\$ 80,000.00</b>	-10,000
AZDVS Small Grants	\$ 10,000.00	
AZDVS Large Grant	\$ 50,000.00	
	\$ 20,000.00	
TBD Grants	-	
<b>TOTAL INCOME FY 2026:</b>	<b>\$ 127,950.00</b>	<b>-10,000</b>

## Project: Chapter House Flooring (FY 2023)

The floor of the Chapter House is in increasing levels of disrepair, especially in the client waiting area and the Commander/Adjutant office.



### REPLACE ENTIRE BUILDING FLOOR IN NON-CARPETED AREAS

Board of Trustees has obtained a verified and accepted bid for \$5,400 to do the entire non-carpeted areas of the building (not including storage closets)

## Project: Reconfigure Chapter House Entryway (FY 2023)

The entrance to the Chapter House as currently constructed presents a difficulty to wheelchair- and walker-bound clients.



**Commercial Right  
Hand (RH)  
Storefront Door  
with 12" Sidelites  
& 10" ADA Bottom  
Rail**

\$1,400.00 - \$1,425.00

**Estimated expenses: Budgeted for up to \$10,000**

REPLACING DOORWAY OPTION



## Project: Gold Star 2024

Gold Star Mothers Memorial Monuments are a tribute made of black granite. One panel will bear the words:

Arizona Veterans  
dedicate this monument to  
our Gold Star Mothers whose sons and  
daughters made the ultimate sacrifice  
while serving in the Armed Forces of  
the United States

The other panel has the image of service members saluting the mother of a fallen comrade.

Sample images:



The intended placement of the memorial is at Mariposa Gardens as the centerpiece of the new Patriots Garden Veteran burial section of the cemetery.

### Estimated expenses:

Fundraising expense: \$ 500.00

Cost of memorial and placement: up to \$ 10,000.00

## Appendix A: Informational Websites

- **DAV East Valley Chapter 8 Website**
  - [www.azdav08.org](http://www.azdav08.org)
  
- **DAV Department of Arizona Website**
  - [www.az-dav.org](http://www.az-dav.org)
  
- **DAV National Website**
  - [www.dav.org](http://www.dav.org)

## Appendix B: Chapter 8 Service Officers

### Mesa Service Officers:

Carl Forkner\*\*\*  
George Colbert\*\*\*  
Kenneth Bell\*\*\*  
Carol Ellis\*\*\*  
James Ellis\*\*\*  
Helen Krsul\*\*\*  
John Lord\*\*\*  
Bob Oberst\*\*\*  
Jerry Peterman\*\*\*  
Zurisadai Jackson\*\*\*  
Joe Rabe\*\*  
Michael Flowers\*  
Larry Krystyan\*

### Payson Service Officers:

Richard Kudlicki\*\*\*  
Jerry Thielmann\*\*\*  
Willis Campbell\*\*\*  
Joanna Santiago\*\*\*  
Jennifer Mefferd\*  
Mark Vincent\*

\* CSO training in January 2023

\*\* CSO training in May 2023

\*\*\* CSO recertification in May 2023