

**UNIT MEMBERS
GUIDE TO THE AMERICAN LEGION AUXILIARY
DEPARTMENT OF OHIO
LEADERSHIP PART 1 – THE UNIT**



PREPARED BY: PAM BATES, DEPARTMENT LEADERSHIP CHAIRMAN

UNIT MEMBERS GUIDE TO THE AMERICAN LEGION AUXILIARY DEPARTMENT OF OHIO LEADERSHIP



- PART 1 THE UNIT - OUT ON www.alaohio.org**
- PART 2 THE DISTRICT – OUT on www.alaohio.org**
- PART 3 THE DEPARTMENT**
- PART 4 CONDUCTING A MEETING**
- PART 5 PROTOCOL & CONDUCT**
- PART 6 THINKING ABOUT BEING UNIT/DISTRICT/DEPARTMENT LEADER**
- PART 7 MISCELLANEOUS**

In reading all the Parts, you will find that there is repetition in many areas. This is done because it doesn't matter at what level you are working, much of the information is the same.

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If we don't conduct ourselves as knowledgeable and informed members – we cannot expect to tell others “WHO WE ARE AND WHAT WE DO”.

If we don't teach and inform our members the correct protocols and traditions, we cannot expect to have good, informed and efficient meetings.

These power point presentation PARTs will provide some basics at Unit, District and Department levels.

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LEADERSHIP PART 1



Content:

- **Auxiliary Mission Statement**
- **Auxiliary Vision Statement**
- **Auxiliary Centennial Plan**
- **Members & Leadership Work Hand In Hand**
- **Members Rights and Responsibilities**
- **President's Responsibilities**
- **Vice President's Responsibilities**
- **Secretary Responsibilities**
- **Treasurer Responsibilities**
- **Chairman Responsibilities**
- **Brainstorming Goals**

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MISSION STATEMENT



In the spirit of service, not self, the mission of the American Legion Auxiliary is to support The American Legion and to honor the sacrifice of those who serve by enhancing the lives of our veterans, military, and their families, both at home and abroad.

For God and Country, we advocate for veterans, educate our citizens, mentor youth, and promote patriotism, good citizenship, peace and security.

VISION STATEMENT



- The vision of the American Legion Auxiliary is to support The American Legion while becoming the premier service organization and foundation of every community providing support for our veterans, our military, and their families by shaping a positive future in an atmosphere of fellowship, patriotism, peace and security.

ALA TAG LINE



***A Community of Volunteers
Serving Veterans, Military,
and their Families***

MEMBERSHIP & LEADERSHIP WORK HAND IN HAND



We are all leaders in this organization.

Reminders

A member who chooses to pay her dues, but not participate –

- has provided the Unit money for their general fund
- the Department with funds for Veterans Affairs, Buckeye Messenger
- funds for Department & National Convention

A member who chooses to pay her dues and volunteer –

- provides the above
- provides her expertise as an officer, program chairman, project chairman or assists all of the above to achieve a goal of the Unit



EVERY MEMBER HAS VALUE!

THE UNIT

MEMBERS RIGHTS & RESPONSIBILITIES



TWO TYPES OF MEMBERS (ONLY)

Senior
Junior

HONORARY LIFE MEMBERSHIPS

Each Department establishes its own rules

Unit pays the National and Department assessments

Cannot be transferred from Unit to Unit nor Department to Department nor one member to another member

MEMBER IN GOOD STANDING

This means that the member has paid her current year's dues and is entitled to the full rights, privileges and benefits

Once a member always a member as long as you pay your dues

THE UNIT

MEMBERS RIGHTS & RESPONSIBILITIES



DO YOU?

- Attend Unit meetings
- Wear your American Legion Auxiliary pin proudly over your heart
- Pay attention and listen to instructions from the “Chair”
- Ask questions
- Express yourself freely and honestly – not after
- Make motions – “I move that” not “I make a motion”
- Vote on motions – by not voting means you agree with the motion
- Welcome guests & new members
- Bring a friend
- Carpool
- Know the difference in the organization’s levels –
National – Department – District – Unit
- Show respect for your officers and other members
- Turn you phone off or on vibrate
- Obey the rules of the organization
- Say please and thank you

THE UNIT

MEMBERS RIGHTS & RESPONSIBILITIES

(cont'd)



HOW TO HELP YOUR UNIT TO BE SUCCESSFUL

- **Give Proper Respect to Officers**
- **Listen and respect others opinions**
- **Know your Unit's Constitution, Bylaws, Standing Rules and Policies**
- **Volunteer ...your time...your energy...your best efforts**
- **Help sign up new members**
- **Pay your dues - the Auxiliary does not work on a calendar year—the new year's cards usually arrive in August and final payment due end of May – these dues support your Unit's programs & operating expenses**
- **Read – The National News; Department Bulk Mail; Buckeye Messenger & share with members; District Newsletters and Unit Newsletters.**
- **Sign up for E-News and E-Bulletins on National website**

THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES



Each Unit, District and Department may be different in their elected positions & duties depending on membership needs and availability of persons to hold these elected positions.

If you want more detailed information on the specific duties go to the ALA Guide Book. If you don't have a Guide Book go to: alaforveterans.org and download the Guide Book or go to Emblem Sales [emblem.legion.org/\(888\)453-4466](http://emblem.legion.org/(888)453-4466) and order the Guide Book - \$9.95 + shipping.

The success of the Unit depends to a large degree upon the efficient and businesslike administration of all of its activities...each Unit officer, committee chairman and member share in this responsibility.

All officers should read the "Plan of Actions (POAs)" provided by Department Chairman on our yearly programs.

THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

PRESIDENT



- (1) Review previous meeting's minutes for items that would need action at your upcoming meeting (are there tabled items; subjects or committee info that is to be provided)**
- (2) Read and re-read your Unit's documents (will there be any action that knowledge of these documents is imperative ; any items that involve parliamentary procedures; voting ballot of any sort)**
- (3) Do you have a guest coming? (who will do the introduction; have a bio of the guest; find out if they need to be excused early; make sure someone greets them; make them feel comfortable; pronounce their name correctly; if this is a guest speaker, make sure in advance they know the time frame for speaking)**
- (4) Times you may need to suspend or dispense with the reading of minutes or reports. (have a member ready to make a motion and another to second; this helps expedite the meeting)**



THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

PRESIDENT (cont'd)

- (5) Will there be a key person absent such as the Secretary, Treasurer or Chairman that needs to report? (in advance ask a member to be a substitute; in the case of an elected officer, you need to ask the body's permission for the pro tem selection; in the case of a Chairman, the Secretary may read the report)**
- (6) Contact your Committee Chairman...(do they have items to bring up and get details so you, as President, understand...not every Chairman will have something to report at every meeting)**
- (7) As President, always be aware of potential problems that may arise. Make sure you place in the correct area of business...committee reports, old or new business—failure to handle this properly could mean a longer meeting or discussing the same top twice.**
- (8) Keep ALL members informed – not just those that attend a meeting**



THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

PRESIDENT (cont'd)

- (10) Prepare an agenda. This not only keeps you, as President organized, but helps the members keep track of where the discussion has been and is going. Try to give the members a copy of the agenda or at least make sure the officers & chairmen have one prior to the meeting.**
- (11) Make sure the room arrangement fits the Unit's style of meeting. (seminar style or round table style; smoking/drinking; noise/distractions/handicap access)**
- (12) Arrive early on meeting night just in case you need to have any discussions with your officers or chairman, who should also arrive a little early and make sure all as been prepared according to the meeting's needs.**
- (13) Stay unbiased at all times...if you must speak relinquish the floor to the 1st Vice President – she does not return to podium until after the vote.**
- (14) COMPILE & SUBMIT YOUR MID & END YEAR REPORTS FROM YOUR UNIT CHAIRMAN TO THE DISTRICT CHAIRMAN!**



THE UNIT OFFICERS' GENERAL RESPONSIBILITIES VICE PRESIDENT(S)

Every Unit may have different duties for their Vice Presidents.

Check your Bylaws & Standing Rules for descriptions of duties.

The 1st Vice should be prepared to fill in for the President and assist the President when she asks.



THE UNIT OFFICERS' GENERAL RESPONSIBILITIES SECRETARY

Minutes are the Official Record of what transpired at your meeting. If there is a question at a later date, the minutes are referred to for a decision of what actually took place.

The Secretary plays an important role in making the most of your meetings. If the minutes are too long, wordy or include unnecessary items, then reading them will take up a disproportionate amount of meeting time and discourage members from listening. If minutes do not accurately include essential items there could be confusion in the future should it be necessary to refer back to them.

Time can be saved if minutes are copied and distributed. The Chair can then ask for the approval as distributed (without reading them). Approval and corrections are handled the same way. Distribution should be in advance of the meeting.



THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

SECRETARY (cont'd)

- Provide the President with a copy of minutes prior to the meeting.
- Arrive early in case there are questions by the President or any members.
- Be prepared to read minutes of previous meeting and should be prepared with all other minutes of meetings. Have roll call ready.
- Prepare the minutes ASAP following the meeting to insure accuracy or use a tape recorder.
- Counts a rising vote when requested by President
- Provides the presiding officer a statement of unfinished business.
- Has on hand at meetings: list of committee chairmen; copy of Unit documents; and correspondence to be read
- Only reads the recommendations from Executive Committee meetings.



THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

SECRETARY (cont'd)

Minutes should include:

- Kind of meeting – regular or special
- Name of Unit, etc.
- Date, place and hours of meeting
- List of officers, chairmen present
- Statement concerning the minutes of previous meeting – whether they were approved or corrected or their reading was dispensed with
- All motions (except those withdrawn); points of order, whether sustained or lost; and the name of the member who introduced the main motion
- Hour of adjournment
- Program topic; method of presentation; names of participants; points covered



THE UNIT

OFFICERS' GENERAL RESPONSIBILITIES

TREASURER

The Unit Treasurer is essential to the smooth function of the proper accounting practices of the Unit

- Prepare a Budget for approval
- Handle all Unit funds
- Record payment of dues, special funds, assessments to Department and National
- Issue receipts of all money collected
- Provide a monthly financial statement at Unit meetings (this should be stated in your Unit's governing documents)
 - ❖ Report: Beginning Balance - Restricted Fund Amount - Other Program designated monies – Income - Ending Balance - Outstanding Checks - Bank Balance
- Prepare for all audits...can be done quarterly, every 6 months, yearly (this should be stated in your Unit's governing documents)
- Should be present to facilitate the audit
- Ensure compliance with the IRS, Form 990...prepare and submit annually
- Pay yearly BONDING FEE...check and make sure your Unit has paid the Department Bonding fee
- Prepare an expense /income sheet for your members to fill out for accountability

Executive Committee



- The Executive Committee is usually made up of the Officers and additional members as stated in bylaws.
- The number should be uneven to prevent a tie.
- Responsible for the governing body of the Unit
- Members of the committee should concern themselves with finances and unit management
- Unit Chairmen or any member who wishes to do a fundraiser or anything that involves money, should be approved by this committee
- Only motions approved recommendations are read at the Unit General meeting – no second needed

THE UNIT GENERAL RESPONSIBILITIES CHAIRMEN



WHY HAVE COMMITTEES IN A UNIT?

- Committee work involves more members
- Utilize individual talents
- Gives member a sense of value to the Unit
- Smaller groups work together more efficiently
- Chairing a committee is the first step to becoming a leader
- Chairman learn to delegate responsibility
- Chairing a committee helps overcome the fear of speaking
- Committee work teaches the value of compromising
- Committee reports save time in a Unit meeting
- There are many committees at our Department Level
 - ❖ It is not expected that you have a member for every program
 - ❖ It is recommended you have at least: Veterans Affairs & Rehabilitation; Children & Youth; Americanism; Community Service; Junior Activities and the distribution of Poppies;

THE UNIT GENERAL RESPONSIBILITIES CHAIRMEN (cont'd)



DUTIES OF UNIT CHAIRMEN

- Accept the appointment **ONLY** if you are interested in the program and willing to implement.
- Read the Plan of Action provided by the Department Chairman so that you are aware of what should be emphasized and the awards.
- Read the Unit Guide Book and all Unit documents to get a job description.
- If there is any finance needed for a project – go through your Unit Executive Committee for approval – do not assume it is okay.
- Actively involve your members, Legionnaires, Sons and community.
- Realize you can't do it by yourself and ask for help—just don't assume they will help – **ASK**
- **NEVER** demand from your members—get their cooperation.
- **REMEMBER** to credit all that deserve acknowledgement and say **"THANK YOU"**
- Provide a report at the meetings – if can't attend send the President your report
- The President is an ex-officio member of all committees, except Nominating
- **COMPILE & SUBMIT MID AND END OF YEAR REPORTS FROM THE MEMBERS TO UNIT PRESIDENT**

THINK OUTSIDE THE BOX

THE UNIT

BRAINSTORMING TO SET UNIT GOALS



- Setting goals is positive and proactive
- Setting goals as a Unit enables all members to take responsibility
- Assess the Unit's strengths and weaknesses
- Determine the goal – who are you helping
- Determine if the goal needs money or volunteers or both
- Set an attainable date to reach the goal
- Keep a positive attitude, stay focused and keep organized
- Be Flexible – be ready to modify or change plan