

MEMBERSHIP GUIDELINES



**Growing from our Roots,
Reach New Heights
2023-2024**



2023-2024

MEMBERSHIP GUIDELINES AND PROCESSING AND PROCEDURES

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MOST MEMBERSHIP FORMS ARE AVAILABLE ON THE DEPARTMENT WEBSITE!!

To: Unit Membership Chairmen

From: Angie Miller, Data Entry Clerk

IMPORTANT!!! IF YOU ARE NOT THE PERSON WHO WILL BE HANDLING THE 2024 MEMBERSHIP DUES FOR YOUR UNIT, PLEASE PASS THIS COMPLETE PACKET ON TO THE PROPER PERSON.

This packet of information is being mailed to the 2023-2024 Membership Chairmen. Louise Aigner will serve as 1st Vice President & Department Membership Chairman. For this year, she has chosen,

Growing from our Roots, Reach New Heights

as Ohio Membership Theme. We encourage you to try to use this in your Unit themes this year.

The items enclosed in this packet are as follows:

1. Pre-printed Membership Cards and Roster
2. Membership Guidelines/Processing Procedures
3. 2024 Membership Dues Transmittal Forms (may be copied or found on our website)
4. 2024 Dues Chart (may be copied or found on our website)
5. Member Data Forms (may be copied or found on our website)
6. Order Form (may be copied or found on our website)
7. Back Dues Form (may be copied or found on our website)
8. Blank Cards and applications

Department Headquarters will begin processing 2024 dues on or after August 1, 2023. Please feel free to call Department Headquarters. We are here to help.

Department of Ohio Information and Instructions

Congratulations on being selected to be your Unit's Membership Chairman! This manual will help you understand how dues are processed, at both the Ohio level and the National level. The task of being a Membership Chairman can be simple if instructions are followed and membership records are kept in order. Questions are sure to arise throughout the year, so please feel free to call Department Headquarters at any time. We are here to help.

National Headquarters sets rules and regulations that each Department and Unit must follow. It is recommended that every Membership Chairmen, Secretary and President have a **Unit Guidebook**. This handbook is published by the National American Legion Auxiliary and is full of information concerning many aspects of the American Legion Auxiliary. You can obtain a Unit Guidebook from Emblem sales at www.emblem.legion.org.

A "School of Instruction" is held in September to help Unit Presidents, Secretaries, Membership Chairmen and Program Chairmen with the upcoming year. You and all members are encouraged to attend to learn more about the operations and procedures of the American Legion Auxiliary. Information concerning the 2023-24 School of Instruction will be sent to the Unit President in August.



2024 Dues Disbursement

The dues paid to the American Legion Auxiliary Department of Ohio are disbursed as follows:

	Seniors	Juniors
National Dues	\$18.00	\$2.50
V A & R	.75	.75
Children & Youth	.25	.25
National Convention	.30	.00
Department Convention	.20	.00
Buckeye Messenger	1.50	.00
General Fund	8.00	2.75
TOTAL	\$29.00	\$6.25

As with each Unit, National and Department also have expenses. Please try to explain this when a member complains that the dues are "too high". \$18.00 of Senior dues and \$2.50 of Junior dues are sent to National to fund projects and to cover operating expenses. The cost of publishing and mailing the Buckeye Messenger has increased tremendously. The Department of Ohio is similar to any other business office. The General Fund is used for operating expenses, i.e., postage, utilities, paper, and printing, etc.; whereas the "Restricted Funds" pay for specific things and are tracked according to what they are for.

The Membership Recommendations are listed below which include the goals for the 2023-2024 Membership year. These will be discussed and adopted at the Department Convention in Dayton, Ohio. These recommendations were adopted 6/2023.

***MEMBERSHIP –**

1. The Department Goal for Membership for the Fiscal Year (8/1/2023 – 7/31/2024) are as follows:

Fiscal Year 2018	40,166
Fiscal Year 2019	38,471
Fiscal Year 2020	36,781
Fiscal Year 2021	35,501
Fiscal Year 2022	34,362
Fiscal Year 2023	34,732
Fiscal Year 2024	35,101

Unit goals will be published in the Buckeye Messenger and sent to the units as soon as the Department determines goals, based from National.

2. Units that reached their goal in 2023 as of May 31st will not have an increase in their membership, but will use the number of total members as of May 31, 2023.
3. Units that did not reach their goal in 2023 as of May 31st, will use their 2023 goal and increase their goal by 1 member.
4. Junior goals will be increased by 1 member for their 2024 goal as of May 31, 2023.
5. Goal Ribbons will be presented to all units achieving Unit Goals for Junior and Senior membership by the May 31 deadline for Citation of Merit.
6. Units achieving Unit Goals after May 31, 2023, and prior to closing of books, the fourth Friday of July, will receive goal ribbons.

Unit Goals for 2024 are attached.

DIST	UNO	2023 Goal	Actual Membership AS of 5/31/23	2024 Goal	Goal Date
01	003	140	133	141	
01	045	41	43	43	3/29/2023
01	060	11	5	12	
01	063	266	274	274	2/28/2023
01	099	18	25	25	5/31/2023
01	110	54	65	65	2/10/2023
01	114	62	65	65	2/23/2023
01	132	23	23	23	3/10/2023
01	135	11	1	12	
01	143	20	20	20	1/17/2023
01	183	173	162	174	
01	223	35	31	36	
01	232	154	153	155	
01	240	101	98	102	
01	262	75	76	76	5/8/2023
01	265	276	258	277	
01	279	30	22	31	
01	287	85	83	86	
01	300	319	317	320	
01	305	30	34	34	5/8/2023
01	307	39	30	40	
01	311	25	23	26	
01	316	89	94	94	5/2/2023
01	320	217	232	232	3/26/2023
01	324	59	51	60	
01	332	104	112	112	4/13/2023

01	334	18	17	19	
01	338	133	137	137	5/16/2023
01	340	100	87	101	
01	373	94	73	95	
01	384	239	241	241	4/28/2023
01	400	11	6	12	
01	409	17	16	18	
01	441	66	65	67	
01	454	94	96	96	3/29/2023
01	468	140	118	141	
01	479	169	158	170	
01	511	21	8	22	
01	516	50	50	50	4/6/2023
01	533	11	9	12	
01	537	48	42	49	
01	539	168	158	169	
01	541	169	156	170	
01	545	18	17	19	
01	553	91	94	94	12/31/2022
01	587	120	105	121	
01	635	12	10	13	
01	642	83	63	84	
01	646	85	77	86	
01	669	60	53	61	
01	680	12	11	13	
01	715	173	239	239	12/24/2022
01	725	11	4	12	
02	096	202	192	203	
02	173	168	169	169	5/23/2023
02	178	315	214	316	
02	191	148	153	153	3/10/2023
02	207	76	80	80	2/13/2023
02	210	365	367	367	5/30/2023
02	217	203	181	204	
02	241	203	201	204	
02	266	40	36	41	
02	268	49	42	50	
02	323	181	181	181	4/18/2023
02	330	153	141	154	
02	345	164	162	165	
02	355	193	182	194	
02	381	27	25	28	
02	387	52	52	52	4/11/2023

02	395	12	12	12	2/24/2023
02	444	76	74	77	
02	470	129	133	133	4/4/2023
02	571	31	28	32	
02	648	82	79	83	
03	006	56	6	57	
03	043	71	71	71	5/22/2023
03	080	13	10	14	
03	120	114	104	115	
03	140	244	248	248	5/1/2023
03	165	288	291	291	5/2/2023
03	174	94	94	94	1/17/2023
03	184	113	111	114	
03	200	103	95	104	
03	215	43	42	44	
03	238	17	20	20	12/19/2022
03	245	34	33	35	
03	286	122	117	123	
03	322	121	132	132	3/20/2023
03	353	115	126	126	1/10/2023
03	360	111	113	113	5/19/2023
03	377	39	37	40	
03	435	94	88	95	
03	487	11	9	12	
03	526	74	69	75	
03	586	200	195	201	
03	588	20	16	21	
03	598	632	717	717	1/27/2023
03	613	42	45	45	2/3/2023
03	619	11	12	12	2/3/2023
03	643	19	14	20	
03	668	137	139	139	4/11/2023
03	675	73	89	89	3/24/2023
03	707	188	198	198	3/7/2023
03	708	11	8	12	
03	746	81	92	92	12/31/2023
03	762	61	57	62	
03	763	106	107	107	4/6/2023
03	776	109	109	109	5/19/2023
03	787	14	13	15	
04	049	133	136	136	4/6/2023
04	069	76	74	77	
04	072	162	135	163	

04	123	61	56	62	
04	138	148	149	149	3/23/2023
04	179	76	76	76	5/31/2023
04	180	44	38	45	
04	186	20	16	21	
04	194	217	221	221	4/6/2023
04	199	214	246	246	10/17/2022
04	218	149	154	154	3/21/2023
04	256	132	140	140	4/11/2023
04	288	110	117	117	2/14/2023
04	367	32	25	33	
04	394	31	28	32	
04	406	24	31	31	3/15/2023
04	450	123	124	124	5/19/2023
04	484	82	85	85	4/24/2023
04	513	94	93	95	
04	530	19	20	20	2/21/2023
04	534	32	38	38	3/31/2023
04	554	41	40	42	
04	615	141	144	144	4/6/2023
04	631	22	27	27	10/31/2022
04	744	45	31	46	
04	755	65	65	65	1/19/2023
04	773	11	9	12	
05	008	216	215	217	
05	012	200	200	200	5/16/2023
05	016	56	51	57	
05	017	45	47	47	4/11/2023
05	030	91	88	92	
05	041	144	143	145	
05	073	84	88	88	3/23/2023
05	083	512	476	513	
05	088	128	117	129	
05	118	268	284	284	3/29/2023
05	169	63	62	64	
05	170	157	93	158	
05	181	198	215	215	12/24/2022
05	202	18	18	18	1/2/2023
05	211	361	378	378	5/2/2023
05	225	59	63	63	2/16/2023
05	243	109	99	110	
05	250	95	88	96	
05	257	329	322	330	

05	260	76	80	80	3/28/2023
05	292	63	65	64	
05	295	90	70	91	
05	326	95	98	98	5/30/2023
05	344	125	129	129	4/11/2023
05	354	99	95	100	
05	397	112	111	113	
05	404	22	21	23	
05	405	63	61	64	
05	434	22	23	23	5/31/2023
05	447	86	77	87	
05	488	24	22	25	
05	503	54	61	61	3/23/2023
05	523	63	67	67	4/24/2023
05	527	60	59	61	
05	535	231	231	231	4/28/2023
05	547	114	119	119	3/26/2023
05	659	16	23	23	11/29/2022
05	676	31	23	32	
05	706	34	22	35	
05	733	113	113	113	5/22/2023
05	749	49	42	50	
06	079	27	14	28	
06	085	227	218	228	
06	092	48	59	59	2/21/2023
06	097	68	56	49	
06	105	106	106	106	5/8/2023
06	107	15	14	16	
06	162	119	122	122	5/26/2023
06	201	18	13	19	
06	254	37	24	38	
06	368	59	56	60	
06	401	63	67	67	5/2/2023
06	417	62	58	63	
06	500	12	6	13	
06	584	184	174	185	
06	605	44	44	44	5/8/2023
06	650	19	17	20	
06	710	15	18	18	12/31/2022
06	754	11	2	12	
06	764	21	17	22	
06	804	11	5	12	
07	014	123	120	125	

07	023	298	300	300	5/22/2023
07	025	146	141	147	
07	062	229	230	230	5/8/2023
07	100	35	34	36	
07	134	94	97	97	5/8/2023
07	142	114	116	116	5/2/2023
07	325	105	117	117	2/15/2023
07	363	19	16	20	
07	433	11	2	12	
07	471	144	121	145	
07	483	32	27	33	
07	594	39	39	39	4/11/2023
07	622	11	0	12	
07	633	92	102	102	3/3/2023
07	653	11	0	12	
07	694	24	24	24	3/6/2023
07	730	29	26	30	
07	757	96	92	97	
08	011	263	260	264	
08	020	11	8	12	
08	021	152	142	153	
08	027	34	40	40	5/2/2023
08	039	21	19	22	
08	058	104	128	128	1/14/2023
08	078	56	48	57	
08	161	36	34	37	
08	222	51	34	52	
08	283	178	196	196	3/10/2023
08	342	11	0	12	
08	371	143	146	146	4/17/2023
08	376	126	129	129	3/31/2023
08	420	11	34	34	2/28/2023
08	476	73	73	73	4/11/2023
08	602	14	13	15	
08	637	31	27	32	
08	677	97	105	105	4/4/2023
09	007	107	90	108	
09	015	20	19	21	
09	076	136	144	144	2/2/2023
09	103	284	282	285	
09	112	172	174	174	1/17/2023
09	151	265	266	266	4/28/2023
09	177	16	14	17	

09	214	98	85	99	
09	235	31	32	32	4/14/2023
09	236	23	20	24	
09	247	15	1	16	
09	301	11	3	12	
09	336	197	176	198	
09	472	56	53	57	
09	506	38	36	39	
09	540	15	9	16	
09	601	86	82	87	
09	663	13	11	14	
09	678	44	47	47	3/7/2023
09	700	31	23	32	
09	719	41	38	42	
09	737	177	170	178	
10	033	64	53	65	
10	034	48	44	49	
10	044	168	178	178	4/17/2023
10	065	12	83	83	10/14/2022
10	067	48	49	49	4/11/2023
10	068	85	77	86	
10	070	66	38	67	
10	086	90	91	91	3/20/2023
10	131	108	101	109	
10	147	43	43	43	5/5/2023
10	166	97	96	98	
10	190	28	14	29	
10	192	119	121	121	4/6/2023
10	204	14	15	15	10/25/2022
10	221	120	122	122	3/20/2023
10	244	12	11	13	
10	274	27	25	28	
10	282	144	159	159	3/4/2023
10	290	149	161	161	4/25/2023
10	351	11	3	12	
10	374	99	82	100	
10	375	76	64	77	
10	407	100	108	108	2/24/2023
10	428	11	5	12	
10	431	81	80	82	
10	436	19	17	20	
10	440	24	18	25	
10	442	18	18	18	4/4/2023

10	482	54	44	55	
10	499	12	10	13	
10	525	140	137	141	
10	529	46	49	49	1/31/2023
10	548	205	214	214	3/18/2023
10	549	26	21	27	
10	551	54	56	55	
10	557	93	110	110	1/25/2023
10	573	36	33	37	
10	651	45	43	46	
10	667	76	76	76	12/31/2022
10	679	20	19	21	
10	682	60	71	71	3/3/2023
10	718	46	41	47	
10	735	21	19	22	
10	736	34	37	37	10/3/2022
10	740	15	12	16	
10	791	12	0	13	
11	024	63	65	65	5/15/2023
11	029	614	579	615	
11	038	37	41	41	3/9/2023
11	052	83	61	84	
11	064	247	231	248	
11	071	97	97	97	5/25/2023
11	077	77	77	77	4/28/2023
11	087	44	36	45	
11	116	11	9	12	
11	159	175	170	176	
11	168	111	123	123	2/27/2023
11	228	97	94	98	
11	366	55	56	56	4/18/2023
11	378	11	3	12	
11	389	258	275	275	3/28/2023
11	399	77	67	78	
11	418	17	16	18	
11	495	37	30	38	
11	521	108	105	109	
11	578	35	45	36	
11	632	38	38	38	5/26/2023
11	641	126	135	135	3/10/2023
11	726	38	30	39	
11	750	109	108	110	
11	760	16	16	16	3/9/2023

11	768	107	112	112	3/14/2023
12	082	12	11	13	
12	144	206	200	207	
12	164	128	127	129	
12	171	66	67	67	3/26/2023
12	239	47	41	48	
12	430	59	37	60	
12	490	58	53	59	
12	532	276	307	307	2/14/2023
12	614	72	55	73	
12	797	26	24	27	
13	091	388	390	390	4/4/2023
13	196	100	141	141	4/6/2023
13	304	46	43	47	
13	309	34	25	35	
13	315	12	5	13	
13	343	75	66	76	
13	421	93	84	94	
13	451	44	36	45	
13	469	21	4	22	
13	572	175	181	181	4/18/2023
13	610	249	250	250	5/19/2023
13	627	126	108	127	
13	703	323	323	323	5/19/2023
13	738	30	29	31	
14	019	46	49	49	2/24/2023
14	175	144	162	162	3/6/2023
14	193	24	24	24	3/26/2023
14	209	27	19	28	
14	272	37	46	46	3/20/2023
14	281	205	223	223	3/29/2023
14	331	173	177	177	4/17/2023
14	449	105	88	106	
14	464	43	43	43	12/31/2022
14	473	31	34	34	12/28/2022
14	496	155	143	156	
14	566	163	179	179	1/24/2023
14	674	66	69	69	5/9/2023
14	685	164	166	166	4/29/2023
14	713	29	23	30	
14	803	27	25	28	

Processing and Transmitting Unit Dues

As members pay their dues to the Membership Chairman, it is kept on a Master Roster with the date or transmittal number that was sent to department. This way, you will always know who has paid their dues along with the transmittal number that it was sent in on. If this is completed each time a member pays their dues, there is less chance that you collect dues from the same person more than once. It will also help to know if you send them on to Department to process. Please see the sample blank roster below.

[illegible]

When sending a roster with the transmittal to Department to process, be sure to indicate which members are to be processed (paid) by putting a check mark, an X, highlighting the member's name, underlining the member's name, etc. We need to see who we are paying. A roster needs to be included with every transmittal. If you are including payment for a member that is not already listed on your roster,

please be sure to include the member's first and last name, their member type (Sr or Jr member) and their ID number, if you have it. **Please do not write the member's you are including on the transmittal on the front of the transmittal, or on a post-it attached to the front of the transmittal, etc.** You may print off the ALAMIS website a roster of your members to include with your transmittal. You only need to send the pages of the roster that contain the names of the members you are submitting for payment. Please know that proper submission of the membership transmittal and the ENTIRE membership roster, gives you a more accurate count of your membership.

Included in this Membership Packet are the original and copies of the roster for your use. As you use these copies, be sure to make additional copies. We have also included a blank roster you can use to send with your transmittal. If you need additional copies and you don't have one left, please contact the office to get one emailed to you.

Membership Cards

Your membership packet has both preprinted and blank membership cards. As your members pay their dues, it is the responsibility of the membership chairman to give them their current membership card. Preprinted cards are in ABC order by member last names. The membership chairman will sign the card and then give to the member.

When completing the blank card, remember to write legibly the member's information, the Unit number, the member's ID number and then sign the bottom of the card. You will need to make out a new card for all new members, transfers and those that need an additional card. You may request additional blank cards at no charge from Department anytime you need them.

As a courtesy, you may send your PUFL members their membership cards each year. All PUFL members receive a permanent PUFL card from National when they become a PUFL. Older PUFL members received a PUFL card when National switched from VIM to PUFL.

Transmittal Forms

Transmittal forms for the 2024 Membership Year are yellow. Beginning August 1, please use the blue forms. If you have someone that is paying for 2023, you must complete the Back Dues form and include payment of \$29.00 per member per year of back dues. Be sure to list what year you are paying back dues for. See a sample of the Back Dues Form.

PAYMENT OF BACK DUES				
Unit Number _____		District Number _____	Date ____/____/____	
Membership Chairman's Name _____		Dept. of <u>OH</u>		
Address _____				
City _____		Zip _____		
Phone _____				
Email _____				
Total Remittance for Dues \$ _____				
PLEASE LIST MEMBERS IN ALPHABETICAL ORDER, BY LAST NAME & THEN FIRST NAME AS IT APPEARS ON ROSTER				
Membership year	Membership ID #	Name	SR	JR
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

New Members

When you have individuals that want to become members of your Unit, verify they are eligible for membership. Once you have done that, give them a New Member Application and ask them to complete it, in its entirety, and return to you with their payment for dues. After they complete the application, give to your Legion Post Adjutant to verify, and ask them to sign the bottom of the application. Applications must be signed by the Post Adjutant or a Post Officer before sending application to American Legion Auxiliary, Department of Ohio office. ALA Membership Chairman are not to sign membership applications as we are not all Legionnaires. Once all this has been done, send this information on a transmittal form with payment to our office. If you have access to ALAMIS and enter your own new members, be sure to send the physical application to our office to file. We need all new member applications on file at our Department Headquarters.

The Transmittal Form is also attached. Please follow the directions when completing this form to send with your membership payment.

2024 MEMBERSHIP DUES TRANSMITTAL FORM

AMERICAN LEGION AUXILIARY, DEPARTMENT OF OHIO
PO BOX 2760, ZANESVILLE OH 43702-2760
(740) 452-8245; Email: amiller@alaohio.org

Unit #: _____

PLEASE FOLLOW INSTRUCTIONS CAREFULLY!

UNIT NAME _____ EMAIL: _____

CHECK NUMBER _____ DATE _____ TRANSMITTAL NUMBER _____

NAME _____ PHONE: _____

ADDRESS: _____

Make checks payable to: American Legion Auxiliary, Department of Ohio. Due to bookkeeping rules, DO NOT include money for donations, supplies, PUFL, or Girls State in check for dues. Monies must be kept separate. Please list a contact, in case of any questions.

2024 PAYMENTS

TOTAL 2024 SENIORS _____ X \$29.00 = \$ _____ # OF NEW SENIORS _____
(Include new seniors)

TOTAL 2024 JUNIORS _____ X \$6.25 = \$ _____ # OF NEW JUNIORS _____
(Include new juniors)

TOTAL CHECKED ON THIS ROSTER _____ TOTAL DUE FOR 2024 \$ _____

ALAMIS USERS ONLY

☐ new member data has been loaded in ALAMIS; applications enclosed.
Yes or No

DUES FOR PREVIOUS YEARS

TOTAL BACK SENIORS _____ X \$29.00 = \$ _____ () 23 () 22 () 21
(Number for each year)

TOTAL BACK JUNIORS _____ X \$6.25 = \$ _____ () 23 () 22 () 21
(Number for each year)

TOTAL DUE FOR BACK DUES \$ _____

TOTAL DUE FOR 2024 DUES \$ _____

MINUS CREDIT \$ - _____

PLUS DEBIT \$ + _____

TOTAL SENT \$ _____

REMINDER: Please include transmittal form, roster with checkmarks and or highlights and new member applications. PUFL members are NOT to be check marked or highlighted.

OFFICE USE ONLY

Ami. ~~Govt~~

***THIS FORM ONLY VALID FROM AUGUST 1, 2023 THROUGH JULY 31, 2024. ***

Please be sure to include your Unit name, number, and district as well as the date and the transmittal number. You will also need to put the name and address of the Membership Chairman. We will not be sending receipts for the 2024 membership year. If there is a problem with what was sent, we will send a letter that will clearly explain what we need to have corrected and sent back to Department for processing. If you ever have a question about your membership, please feel free to contact Department. We would be happy to help.



In the next session, for the area that lists the number of members that are paying the current dues (2024). In the first blank list the TOTAL number of seniors that are paying dues and multiply this by \$29.00. If you have any Junior members, do the same thing, and multiply those paying by \$6.25. This is the amount that is sent to Department to cover your National portion and Department portion of each member's dues. On the last line, list the number of members that are new members.

The next section is where you will list any of the back dues of members. Be sure to include the \$29.00 for Senior members and \$6.25 for Junior members.

In the next section, you will add up the money you are sending and listing it here. Add the amount for back dues for Seniors and Juniors. On the next line add the amount for current dues for Seniors and Juniors and list here. Watch for a statement each month that will list either that credit that your Unit can use towards membership or a debit that will need to be paid to the Department for membership. If you have a debit, or owe money, please add it to this transmittal. The last line is the total payment you are sending into Department of Ohio for membership. When mailing to our office, we only accept check.

Corrections to Member Information

If you have a member that needs to change their last name, address, email, or phone number, they need to complete a Member Data Form. This will need to be sent to our office so changes can be made in the computer. This form is also used for those that are transferring to different Unit, or to report Deaths. For those wishing to transfer to another Unit, the bottom section of the form needs to be completed by the member and the new Unit. Send the completed form to our office so the transfer can be done. If you are reporting a death of a member, be sure to include the death date of the member as it is needed to enter into ALAMIS. When filling out this form, please be sure to include the Member ID#. This is required to make any of the changes indicated above. **Please do not make changes to member information on your membership rosters.** It does not get done from there. You **MUST** send in the Member Data Form to have changes made. If you need additional forms, contact our office.

 American Legion Auxiliary 	
MEMBER DATA FORM	
Member ID# (Required) _____	Date: ____/____/____
Name on Roster: _____	Unit # ____/____
<input type="checkbox"/> SR <input type="checkbox"/> JR <input type="checkbox"/> Deceased – Date of Death: ____/____/____	<input type="checkbox"/> VIM/PUFL <input type="checkbox"/> Honorary Life Member
<input type="checkbox"/> Check here if Member is currently Unit President/Secretary/Treasurer/Membership/District Chairman	
CORRECTIONS	
<i>Old Information</i>	<i>New Information</i>
<i>Please Type or Print Legibly</i>	
Name _____	New Name _____
Former Address _____	New Address _____
Former City _____	New City _____
Former State _____	New State _____
Former Zip _____	New Zip _____
Former Telephone # _____	New Telephone # _____
Former Email Address _____	New Email Address _____
UNIT TRANSFERS	
Previous Unit # _____	NEW Unit # _____
Previous Department/State _____	NEW Department/State _____
Continuous Years _____ for _____	(paid year) _____
Signature – Member (Required) _____	Signature of New Unit Officer (Required) _____
Date: _____	Date: _____
JUNIOR TO SENIOR	
<input type="checkbox"/> Senior Member moving to a Junior Member	
<input type="checkbox"/> Junior Member moving to a Senior Member	
Date of Birth (Required) _____	
Member Name _____	
Send completed form to: AMERICAN LEGION AUXILIARY DEPARTMENT OF OHIO PO BOX 2760 ZANESVILLE, OHIO 43702-2760	
Phone: (740) 452-8245 Fax: (740) 452-2620 lori@alaohio.org	

ALA Management Information System (ALAMIS)

If you are new to ALAMIS, you can be authorized to use WRITE Access with two persons from your Unit to be authorized. Units are able to make updates, perform searches, and view Unit reports.

There are some new things happening with the ALAMIS system for membership this year. Ohio Units have begun, **upon department approval**, being able to process Unit dues. We have been authorizing those Units that are currently working with ALAMIS. You need to have the department approval to participate. This level of ALAMIS access will be known as UNIT FULL access.

WRITE capabilities are:

- Make Updates
 - ✓ Add new members.
 - ✓ Update Member information (name, address, phone number, email address, birthday, marital status).
 - ✓ Update *Auxiliary* magazine preference.
 - ✓ Update solicitation preference.
 - ✓ Request to have no mail/phone calls.
 - ✓ Add Unit leadership positions.
- Perform Searches
 - ✓ See if dues have been applied to a member in the Unit.
 - ✓ View a member's join date.
 - ✓ View a member's membership activity.
 - ✓ Search for members in the Unit.
 - ✓ Filter and view only expired, junior or adult members.
 - ✓ View a member's continuous years of membership.
 - ✓ View a member's paid through date.
 - ✓ See in a member is in a special category such as Paid up For Life or Honorary Life member.
- View Reports
 - ✓ View Unit reports to export into Excel, Word, or as a PDF document.
 - ✓ Use Excel exports to do mail merges in the Unit needs to send letters, emails, or make labels for members.
 - ✓ Use membership Roster to view all members in their Unit.

- ✓ Use Leadership Roster to view all leaders in their Unit.
- ✓ View the members who have paid dues report.
- ✓ View the members who have paid their dues online report.
- ✓ View the members who have not paid dues report.

UNIT FULL capabilities are:

- All the capabilities of Unit Write access PLUS the following:
- Pay membership dues through ALAMIS. Units will pay both the department and national portion of dues for members (\$29.00). National will then remit back to department along with a separate report that will show which units paid dues and which members were paid from National.
- Rejoin former members within their unit. ALL transfer requests of current members, expired members or former members will still need to be processed by the department on a transmittal form.
- Enter new members and pay their dues. **Please Note:** New member applications will need to be sent to department headquarters as you enter them.

There will be requirements in order to have Unit Full access:

1. Membership dues must be paid using a VISA or Mastercard (credit or debit only).
2. All Unit Full users must attend a training session.
3. **Users will not be granted access until after they have attended a training session.**

As previously mentioned, there will be charges to the ALAMIS user access fees starting in **January 2023**.

The new rates will be:

District View \$10.00

(District View is only for Past Department Presidents, Current District Presidents, and Current Department Officers. THIS IS NOT AVAILABLE FOR UNITS.)

Unit Write \$15.00

Unit Full \$20.00

Units can have up to 2 logins at a time. **Note: You may only have 1 Full Unit user. Units can have a combination of access levels.**

Units can start sending in Unit Write and Unit Full access requests now. Please email your request to Department Headquarters attention vicky@alaohio.org. When emailing Vicky, please email from the email you want to use to access ALAMIS. Be sure to include your Unit number and your name (as it is on your membership card).

Please remember that users will not be able to be considered for FULL Access unless they are currently using the WRITE Access. Please remember that you may not utilize and access the Unit Full access until after you have attend a training session.

General ALAMIS Information

1. How do we sign up to be on the ALAMIS System?

Set up an email for yourself or if you already have one set up for National's website, please use it. Email Department Headquarters at vicky@alaohio.org with the name, title and unit of the person that will be using ALAMIS. This information is forwarded on to National Headquarters. Once they have set up everything, they will send you an email letting you know what the unit's login and password is to get onto the ALAMIS System also with training material.

2. What kind of computer equipment or software is needed to access the ALAMIS site?

The ALAMIS is entirely web-based. Departments/units do not need a specific operating system or to purchase any expensive hardware/software to process membership, only a computer with Firefox and a monitor resolution setting of at least 1024x768. Our research shows that 95% of internet users meet these requirements. Since data from system-provided reports can be further manipulated (labels, mail merges, email lists, etc.) by exporting the data into Excel, Word and text files, Units will find it extremely helpful, but NOT required, to have Microsoft Office software and a high-speed internet connection.

3. What are units able to do in the system as a Unit Write access?

Units can do the following:

- Update unit member information
- Update unit leadership
- Run unit reports.
- Add new members.
- View only your unit's information.

4. What are units able to do in the system as a Unit Full access?

Units can do the following:

- All items in the Unit Write access.
- Process dues with a credit/debit card.
- Rejoin former members to their Unit only.

5. How are users trained on the ALAMIS System?

Department Headquarters and/or National Headquarters conduct training sessions where training materials are given via email when log in information is received. If you need immediate assistance on how to use the system, please contact Department Headquarters.

6. How much will the ALA Management Information System cost Units?

Units who have been designated with one login will be charged \$15.00, two logins will be charged \$30.00. The department will send your unit an invoice upon confirmation of being notified by National for the amount due. The department will be charged for each unit that is using ALMIS System; therefore, bills will go out every November/December in hopes to have all payments received in headquarters by the time National bills us in January. If your payment has not been received by December 31, you will be removed from the list and will not have access and will need to reapply for ALAMIS access.

7. How often can I receive reports?

All data in the ALAMIS is “real time” meaning that information and reports can be accessed by units monthly, weekly, daily, hourly, each time with the current, most up-to-date information available.

8. If I need my membership data for a unit mailing, how can I access it?

There are several reports available. If these reports do not meet your needs, you can download your unit membership data into an Excel spreadsheet or text file that can be sorted, filtered, or manipulated any way you choose. If you need assistance in making labels and do not know how to do a mail merge, please contact the Department Headquarters for documentation.

9. If I need help, who can I contact?

You may contact Angie Miller amiller@alaohio.org or Vicky Buck vicky@alaohio.org at Department Headquarters for answers to your questions. You may also email National at alamishelp@legion-aux.org and they will also be able to help you. If you contact National, please be sure to list your name, your Department, Unit number, and the problem so that they will know who to direct your call to. Including the member ID number and name can also expedite the answer to your question.



2023-2024 MEMBERSHIP INCENTIVES

- 1. \$50 Drawing: All Units reaching 25% or more by November 11, 2023, are entered into the drawing to be held at Mid-Winter.**
- 2. 2 - \$50 Drawings: All Units reaching 45% by December 7, 2023, are entered into the drawing to be held at Mid-Winter.**
- 3. \$100 Drawing: All Units reaching 75% by December 31, 2023, are entered into the drawing to be held at Mid-Winter.**
- 4. \$50 Drawing: To the District President, to be used for District Membership, who sells the most Membership pins with a turn in date at Mid-Winter. Given out at Department Convention.**
- 5. \$50 to the Unit with the highest increase of Junior members from August 1, 2023, to May 1, 2024. Given out at Department Convention.**
- 6. For all Goal Units by June 1, 2024. Drawing held at Department Convention. 1st gets \$75.00, 2nd gets \$50.00, and 3rd gets \$25.00.**

PERSONAL INCENTIVES:

- 1. A gift to the District President(s) who makes District Goal by May 31, 2024. Gift given at Department Convention.**
- 2. A gift to the Unit Membership Chairman who signs up the most new members by May 31, 2024. Gift given at Department Convention.**

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

National Membership Information and Instructions

American Legion Auxiliary

Department Operations Guide

Chapter 8: Membership

CHAPTER 8

MEMBERSHIP

Executive Summary

As a membership-driven, nonprofit patriotic service organization, the American Legion Auxiliary could accomplish very little without its members and their individual dedication to our mission. The very fact that we have over 500,000 members carries tremendous influence and clout as we lobby for veterans' issues along with the rest of the Legion Family. Through our various programs, our dedicated members impact the lives of veterans, military, and their families, as well as the general public. The future of the ALA and the continuation of our great works depend on our ability to recruit and retain members. In short, without our members, the ALA could not exist.

This chapter offers information on who is eligible, guidance on recruiting and retaining members, and membership processing procedures.

This chapter contains the following sections:

Section 1 Membership Eligibility

- IRS Regulations for 501(c)(19) Organizations & Eligibility
- Authorized Forms of Membership
- Membership Recruitment and Retention

Section 2 Membership Processing

- Membership Application (Traditional) Membership Application (Online)
- New Members
- Paid Up For Life Membership (PUFL)
- Membership Renewal
- Membership Dates and Deadlines
- Membership Cards
- Organizing New Units/New Charters

Section 3 Frequently Asked Questions (FAQs)

Section 1

Membership Eligibility

As stated in the ALA National Constitution & Bylaws, each unit of The American Legion Auxiliary shall be responsible for verifying eligibility and deciding its membership, subject to the restrictions of the national governing documents.

Once eligibility is established, applicants who meet the eligibility requirements may become members of an Auxiliary unit. A member of a unit is also a member of the department and the national organization. By payment of dues to the unit, a member also contributes to the support of their department (state) and the national organization.

Membership in the American Legion Auxiliary shall be limited to:

- 1) grandmothers, mothers, sisters, spouses, and direct and adopted female descendants of members of The American Legion; and
- 2) grandmothers, mothers, sisters, spouses, and direct and adopted female descendants of all men and women who served in either of the following periods: April 6, 1917, to November 11, 1918 and any time after December 7, 1941 who, being a citizen of the United States at the time of their entry therein served on active duty in the Armed Forces of any of the governments associated with the United States during either eligibility periods and died in the line of duty or after honorable discharge;
- 3) grandmothers, mothers, sisters, spouses, and direct and adopted female descendants of all men and women who were in the Armed Forces of the United States during either of the following periods: April 6, 1917, to November 11, 1918; and any time after December 7, 1941 who served on active duty in the Armed Forces of the United States during either eligibility periods and died in the line of duty or after honorable discharge; and
- 4) to those women who of their own right are eligible for membership in The American Legion.

Other factors to consider when determining membership eligibility:

- When a request for ALA membership is based on the military service of a family member who is still living, that family member must be a member of The American Legion before the relative may join. The applicant does not have to apply to the same TAL post home as their family member.
- When a request for ALA membership is based on a deceased veteran, the prospective member will be asked to provide verifying documentation that proves eligibility (*see acceptable documentation below*).
- When a woman veteran applies to join the ALA without being a member of The American Legion, she is eligible to join if her service dates fall within one (1) of the eligible service periods as described in the National Constitution, Article III, Section 1. However, should her family members wish to join the ALA or the Sons of The American Legion through her service, she must first become a member of The American Legion. The Legion will verify the woman's eligibility.
- Male spouses are eligible to join the American Legion Auxiliary. If their spouse (male or female) is living, they must be a current member of The American Legion before the male spouse may join the ALA. If their spouse is deceased, the spouse must have served during one of the eligible service periods.

NOTE: No other male relatives are eligible to join the American Legion Auxiliary at this time.

The following documents are acceptable to verify membership eligibility in the ALA:

1. DD214 discharge papers (not issued until after the Korean War)
2. Official military orders
3. Official military service citations/awards
4. Letters related to the veteran's military service; must be on official government letterhead.
5. Certificate from the VA records center in St. Louis
6. Data from the back of older discharges

It should be noted that discharge papers or copies of official military orders are not always easily available to the veteran, especially to those United States (U.S.) citizens who served in allied forces during military conflicts in a common area with the U.S.

In one such example cited by an American Legion source, a U.S. citizen who was visiting Europe at the beginning of WWII was trapped behind enemy lines, and because of German heritage, he was drafted into the German army. Later, he wound up separated from his German unit near the Russian front (Russia was an ally of the U.S. in WWII) and was soon fighting with the Russians against the Germans. Following the war, he returned to his hometown, Chicago, Illinois, and wanted to join The American Legion. His verification of service was Russian documents (translated) and commendations. He was allowed to join The American Legion.

Another example, where pictures established active-duty service, might be sailors or Marines in uniform while on liberty in a foreign port.

Key elements to review on any documentation, whether discharge papers or military orders, are dates of service and the character of the service (i.e., honorable or dishonorable). The American Legion does not research to verify the details behind the DD214 unless it appears to be falsified. Any falsified DD214 or military orders should be referred to the FBI. If the discharge is listed as "non-characterized," refer those to the NHQ Executive Director, who will ask Counsel General to review the coding listed.

Information on a veteran's service record can be obtained by contacting the National Archives and Records Administration at 1-866-272-6272 or www.archives.gov/veterans.

IRS Regulations for 501(c)(19) Organizations & Eligibility

Per the Internal Revenue Service (IRS) regulation for 501(c)(19), an organization may be exempt under section 501(c)(19) as an auxiliary unit if it meets the following requirements:

1. It is affiliated with and organized in accordance with the bylaws and regulations of a veterans' post or organization.
2. At least 75 percent of its members are veterans, spouses of veterans, or related to a veteran within two degrees of consanguinity (i.e. grandparent, brother, sister, grandchild represent the most distance allowable relationships);

3. All members are either members of a veterans' post or organization, or spouses of a member of such post or organization, or are related to a member of such post or organization within two degrees of consanguinity; and
4. No part of its net earnings inures to the benefit of any private shareholder or individual.

<https://www.irs.gov/charities-non-profits/other-non-profits/veterans-organizations>

Definition of Spouse

The term "spouse" and the terms "husband" and "wife" – as defined in Code of Federal Regulations 26 Section 301.7701-18 – means an individual(s) lawfully married to another individual(s).

This IRS regulation concludes that the terms spouse, husband and wife do not include individuals who have entered into a registered domestic partnership, civil union, or other similar formal relationship not denominated as a marriage under the law of the state, possession, or territory of the United States where such relationship was entered into, regardless of domicile.

This means that the individual non-veteran in these non-recognized relationships – domestic partnerships, civil unions, or other similar formal relationships not denominated as a marriage – are not American Legion Auxiliary member-eligible.

Note: See full Legal Opinion by the National Judge Advocate dated September 5, 2019, on the definition of "spouse" at the end of this chapter.

Definition of Two Degrees of Consanguinity

Two degrees of relation from whom the member is seeking eligibility. Furthest allowable relationship is grandmother or granddaughter. Great or great-great-granddaughters cannot join the Auxiliary. Current members whose eligibility relationship is great-granddaughter, great great-granddaughter or direct descendent can continue being a member, as long as their dues are kept current.

If a member whose eligibility relationship is great-granddaughter, great-great-granddaughter or direct descendent becomes delinquent, they may reinstate their membership only by payment of back dues for all years of delinquency or by establishing new eligibility.

Authorized Forms of Membership

The only authorized form of membership is active membership, of which there are two (2) classes: Senior and Junior. Granting special or honorary membership for any purpose or reason whatsoever is prohibited.

Senior members are those who are age eighteen (18) or older and those under the age of eighteen (18) years and married.

Junior members are those under the age of eighteen (18) years; their activities are supervised by Senior members. Upon reaching eighteen (18) years of age, Junior members are automatically admitted into Senior membership with full privileges. Junior members conduct their own meetings and perform their own special activities, planning their own community service projects and supporting unit projects. Junior members may hold honorary national officer positions. These young volunteers

follow in the footsteps of Senior ALA members by donating thousands of hours in service to our veterans.

Once accepted as ALA members, they may continue their membership from year to year, whether or not their veteran relatives continue membership in The American Legion. The fact that a member's service relative is no longer a member of The American Legion does not compel the ALA member to lose their ALA membership, as long as they do not have a lapse in dues payments.

The phrase "died in the line of duty," applies to all persons who were killed in action, died of wounds or disease, were killed by accident or otherwise came to their death other than as a result of their own misconduct. In case of doubt, the Adjutant General of the Army, or the Navy Department, Washington, D.C., can advise if the person was considered to have died in the line of duty.

Any person who legally marries a member of The American Legion at any time is eligible for membership in the ALA. A man or woman who is the *legal* spouse of a male or female Legionnaire is eligible for membership in the ALA.

Widows from legal marriages are also considered spouses for membership.

Applications for membership must be completed for every applicant, and they must provide proof of their eligibility.

Paid Up For Life membership (PUFL): Any member in good standing whose membership dues are paid for the current year may become a PUFL member.

Honorary Life Memberships: This distinction was created for units that confer Honorary Life Membership on outstanding members.

Member Recruitment and Retention

Recruiting and retaining a diverse, active membership is critical to our mission. Well into the future, veterans will need our support and advocacy to assist them at home and abroad, during war and peacetime, to receive the attention and support they deserve.

To ensure the American Legion Auxiliary continues to exist for a future of serving our veterans, military, and their families, our goal is to enhance membership strength. Following is a sampling of the resources available on the MyAuxiliary portal of the national website at www.ALForVeterans.org to assist in achieving this goal:

1. *The American Legion Family Membership Brochure*
2. *Paid Up for Life Application*
3. *Unit Guide*
4. *Door Hanger Templates*
5. *Volunteer Interest Form*
6. *ALAMIS Training Manuals*
7. *Membership Award Forms*

It is important for department officers, board members and other leaders to become familiar with the tools available as units work to increase the ALA's positive visibility to attract and retain members. Letting members know that their contributions are valued, along with welcoming, respectful treatment goes a long way toward creating a positive experience and an appealing environment for both current and potential members. Department officers are encouraged to mentor unit leadership with these ideals.

Section 2

Membership Processing

Membership Application (Paper)

Applications. Units may obtain membership applications from their department headquarters or download from the national website. Completed membership applications, along with payment of department and national dues, are sent by the unit to department headquarters.

The signature of the Post Officer should be on every application of those applying for membership in the ALA. The only exception to this is if the member is a female veteran and eligible in her own right, the Auxiliary unit officer can sign off on the application. The Post Officer verifies *only* eligibility of the applicant, not acceptability of the applicant into the unit.

Retaining applications and protecting personal information. The American Legion National Judge Advocate/ALA Counsel General advises that since eligibility for membership can be challenged at any time during the life of the member, eligibility information should be retained indefinitely, as long as the member is alive. Units are advised to have access to a locked file cabinet in the post or other secure place for record retention. Personal identifying information such as social security numbers and birth dates should be redacted (blacked out) using a redacting pen in order to prevent identity theft. Only the eligibility information needs to be securely retained, and redacted records can be digitized to save space and provide a more convenient way to retain the information.

Counsel General notes that in recent years, the IRS has been more stringent about demanding to see eligibility records when they are doing field audits of posts, units and departments. The fact that the IRS has escalated its audits of Legion and ALA entities in recent years may lead to confusion about the length of time for retaining IRS records versus the length of time for retaining eligibility verification records. Counsel General has advised that tax returns need be kept for only seven (7) years, but eligibility records should be retained for the life of the member.

Membership Application (Online)

New members can complete the membership application and pay their dues on the national website. They will be required to complete an affidavit affirming their eligibility. It will be up to departments (or units in which the new member transfers) to confirm that the new member meets ALA eligibility requirements.

When joining the American Legion Auxiliary via the national website, the member will receive a welcome email and be placed in the Department Headquarters Unit. Departments are encouraged to run a "new member report" on a weekly basis to identify new members, to confirm each member's eligibility, and to send a Department welcome to the new member. A membership card is mailed directly from National Headquarters when a member joins or renews online.

New Members

The following is taken directly from the ALA National Standing Rules:

A new member joining the American Legion Auxiliary prior to the annual National Convention must pay full current annual dues to be eligible for full membership rights, privileges, and benefits.

A new member joining after the National Convention may be given by the Unit full membership rights, privileges, and benefits from the date the dues are received through December 31 of the following year.

ALAMIS Tip: When entering new members into ALAMIS, members must have an effective date OF or AFTER September 1st of the current membership year in order for the member to be billed and joined for the upcoming membership year. Example, a member with a join date of August 15, 2021, will be joined and billed for the 2021 membership year; a member with a join date of September 1, 2021 will be joined and billed for the 2022 membership year.

Paid Up for Life membership (PUFL)

PUFL Membership

1. Is the Auxiliary's national paid-up-for-life membership program.
2. Is purchased by the member with a lump sum payment. If the PUFL membership is a gift, the cost is paid by the gift giver.
3. Was established by resolution adopted at the 2/18/1981 National Executive Committee Meeting in Washington, D.C.

PUFL Eligibility

1. Traditional members in good standing (having a valid membership card for the current year) may become PUFL members.
2. Members whose dues are not paid for the current year are considered delinquent and must pay current year dues before becoming eligible to become a PUFL.
3. Current year dues payments must be reflected in the national membership system (ALAMIS) before PUFL applications can be processed.

Cost of PUFL Membership

1. Is based upon two factors:
 - Age of the member at the time the application is submitted.
 - The total unit dues amount at the time the membership is purchased.
 - Unit dues consist of department dues per capita, national dues per capita, and the dues amount retained by the unit.
 - The dues amount used to compute the cost of a PUFL membership may not be less than the sum of department dues per capita and the national dues per capita; units have the option of waiving their portion of dues.
 - Use the rate chart on the back of the PUFL application to determine exact cost of a PUFL membership.

2. Dues paid in advance may be deducted from the total PUFL fee only until December 31st of the year in which they were paid in advance.
 - For the deduction to be recognized when processing the application at National Headquarters (ALANHQ), the following is required:
 - The completed and certified PUFL application must reach ALA NHQ no later than December 31st.
3. PUFL members will never be obligated to pay any additional amount if there is dues increase.
4. PUFL fees are non-refundable.

PUFL Trust

1. The PUFL Trust is maintained by ALA NHQ.
2. Money from the trust fund can only be used to support the PUFL program and to pay annual dues per capita each year to the unit, department, and national organization.
3. The interest income from the trust fund is used to cover the cost of dues increases at the national level.

Annual Payments to Units and Departments

1. Annual payments will be made from ALA NHQ in the fall for all PUFLs on record for the current membership year.
2. The PUFL member's unit and department will always receive the amount of annual unit dues per capita and department dues per capita in effect at the time the member joined the PUFL program.

NOTE: *If the unit chooses to waive its portion of dues, the unit will not receive annual payments for that member.*

Completing the PUFL Application

1. Applicant: *(must have paid dues for the current membership year)*
 - Completes Section 1 of the application form (See PUFL form on national website)
 - Using rate chart on back of the application, determines their PUFL fee.
 - Attaches appropriate payment: (check or money order made payable to American Legion Auxiliary, National) or provides all charge card (VISA, Mastercard, or Discover) information requested on the application.
 - Submits application to the unit secretary for certification.
2. Unit secretary:
 - Verifies that the applicant has accurately and fully completed Section 1 of the application.
 - Verifies that the member is in good standing (either has a valid membership card for the current year or is current with dues as verified in the national membership records database).
 - Completes, accurately and in full, Section 2 of the application.
 - Records the applicant's member ID number.
 - Lists the amount of current annual unit dues.
 - Verifies that the applicant has listed the correct PUFL fee based on the applicant's current age and the current amount of unit dues. (If applicant has listed the fee

- incorrectly, work with the member to correct before sending to National Headquarters.)
- Indicates if unit is waiving its portion of dues, thus reducing the amount on which the fee is based.
- If applicant has paid dues in advance (by December 31st of the previous membership year) and is reducing their fee by that amount, ensure that the department has transmitted their dues in time to be reflected in the national membership system (ALAMIS) by January 1st. (Advance dues payments cannot be deducted after January 1st of the current membership year.)
- Provides their address and phone number.
- Certifies, with their signature, that the application is complete and that all information on the application is accurate.

NOTE: Applications lacking sufficient information, payment, or certification will be returned to the unit secretary.

- Makes a copy of the application for unit and/or department records.
- Forwards original certified application, along with payment, to American Legion Auxiliary, Attn: PUFL, 3450 Founders Road, Indianapolis, IN 46268.
- May obtain current PUFL application forms from department headquarters or on the national website.

Identifying PUFL Members

1. After the PUFL application and payment are processed at National Headquarters, the PUFL member will be issued a PUFL card.
2. Allow thirty (30) days to receive PUFL card.

PUFL Members Transferring to Another Unit

A unit accepting the transfer must agree to accept the unit dues per capita amount established by the former unit at the time the PUFL application was processed.

PUFL Member vs. Honorary Life Member vs. State Life Member

1. PUFL membership is purchased and requires completing an application issued by National Headquarters.
2. Only a unit can bestow honorary life membership.
 - The unit pays dues for their honorary life member each membership year.
 - National Headquarters does not provide applications for, nor can it process, honorary life memberships.
 - All honorary life membership records are maintained at the unit and/or department level.
 - Departments should mark the member's record as an honorary life member (HLM) to discontinue the renewal notice.
 - Honorary life memberships are valid only within the unit bestowing the membership.
 - If an honorary life member transfers to another unit, or the unit disbands, the honorary life membership becomes void.

- Honorary life membership cards and pins can be purchased through the Emblem Sales Division of The American Legion; purchase of a pin requires the approval of the Department Secretary.
3. Departments pay State Life Memberships, and dues should be submitted to National Headquarters.
 - State Life Memberships are not transferable from state to state.

PUFL questions? Email Membership@ALAforVeterans.org with other questions about the PUFL membership program.

Membership Renewal

National Headquarters sends membership renewal notices via email or postal mail directly to all Senior members except those in foreign units. Junior members do not receive a renewal notice. The personalized notice includes the amount of the annual unit dues and the name and address of the individual within the unit to whom the dues are to be paid. The national organization underwrites the entire cost of membership renewal.

Payment

1. Although the notices are emailed or mailed by National Headquarters, the unit member may pay dues directly to the person receiving dues at the unit – either in person or by mail, via credit card on the national organization website, or by calling the Membership Division at National Headquarters at 317.569.4570. Members who choose to pay their dues on-line or over the phone will receive a receipt and have the ability to print their membership card. National Headquarters will mail a current year membership card to any member who renews or joins online.
2. If payment is made by mail, the member must enclose a check, along with the remit portion of the renewal notice, in the window envelope provided in the renewal notice mailing.
3. If a Senior member wants to pay dues for a daughter, granddaughter, or another person, the Senior member must provide that person's name, complete address, and member ID number on the back of the renewal form. This form, along with appropriate dues payment, may be mailed along with the Senior member's dues in the window envelope. This procedure must be followed to ensure proper credit.

NOTE: Unit dues represent the total of three amounts: the unit portion, department portion, and national portion. The unit retains its portion and transmits the balance to the unit's department headquarters which keeps its portion and transmits the national dues amount to ALA NHQ.

Renewal Notice Mailing Schedule

Notice	When Mailed	To
1st	September	all Senior members
2nd	February	all Senior members for whom dues were not received by National Headquarters by early January

Emailed renewal notice schedule may vary year to year.

NOTE: Members can opt out of emailed renewal notices by contacting their Department headquarters or the Membership Division at ALA National Headquarters.

Membership Dates and Deadlines

Please refer to the ALAMIS calendar on the ALAMIS Home Page for dates and deadlines for dues rate changes, renewal notices, membership cards, PUFL disbursements, etc.

Unit Data Form – Direct Billing

To ensure that the information printed on renewal notices is accurate, each unit must complete, and forward to their Department Secretary, a Unit Data form or similarly designed department form.

1. The deadline for receiving Unit Data Forms is set annually by each department. Departments should set due dates for units to submit this form based on the annual ALAMIS calendar of events so that departments can submit and verify information on time.
2. It is imperative that National Headquarters has complete and correct information to ensure that renewal notice data is accurate. Required information for each unit includes 1) annual dues rates and 2) “remit to” name and address.
3. When reaching out to units to gather dues rates and “remit to” information, it is recommended that Departments collect unit officer information and update in ALAMIS.

Prompt Processing of Dues

Prompt processing of dues at the unit and department level is extremely important; National Headquarters must receive dues well before the dates listed in the *Renewal Notice Mailing Schedule* to prevent mailing unneeded notices. However, because delays do occur, it is of equal importance for unit and department leaders to educate their members that some may receive a renewal notice although their dues have been paid. In such cases, please inform them to disregard the notice.

NOTE: If a unit is paying dues for/on behalf of a member, (honorary life members), make sure those dues are submitted on the first transmittal of the membership year.

Membership Rollover

National Headquarters conducts a “membership rollover” each year in early February. This rollover moves unpaid members to expired status and expired members to a former status. The membership year is from January to December. *Example:* On February 1, 2021, members not renewed since 2019 will move to “expired,” and members not renewed since 2018 are moved to “former” members, all of whom will have their continuous years and join date reset to zero.

Dues Statements

Dues statement postcards are available for departments to order from National Headquarters. They can be used by units to send renewals to junior members, send additional renewal reminders to a unit’s membership, or to send updated dues and/or “remit to” information to members if the incorrect dues or remit to information was reported to National Headquarters.

Membership Cards

Membership cards will:

1. Be shipped to most department headquarters in time for the department's annual convention.
2. Include a stock of blank card sheets to be distributed at the department's discretion.
3. Be sorted by unit, including Membership Roster, and shipped directly to each department headquarters for distribution.

Card Reprints

If card reprints are needed, units should contact their department headquarters. Request for reprints, or any other "Service Orders," can only be accepted at National Headquarters from the department secretary.

NOTE: *Reprints are done only if the unit loses the cards or the cards are destroyed. For a name change or transfer, use a blank card to prepare and issue a card with current information.*

NOTE: *The cost to departments to reprint membership cards is \$1 per printed card and/or \$1 per blank sheet of cards (8 cards per sheet). A membership card printing template can be requested from the Membership Division at National Headquarters.*

Organizing New Units/New Charters

Organizing a new unit is exciting and a good way to build membership. Many Legion posts in each department are without the benefit of an Auxiliary unit. Departments are encouraged to check with Legion department headquarters for a list of those posts. Become familiar with the information contained in *How to Organize a Unit* so that you can assist interested Auxiliary members/ TAL posts with chartering a new Auxiliary unit.

Procedures for New Charters

The Unit Charter Application is available online at the national website. Department headquarters should receive the following from a new unit:

- All three copies of the signed charter application. All copies must be signed by the Post Commander and attested by the post adjutant.
- All Name, number, and location of unit must be identical to the post.
- A completed form or letter indicating the unit's total annual dues amount for each Junior and each Senior member as well as who will receive the renewal notices.
- New charter fee of \$10.
- Department and national portion of dues. Departments will then forward the national portion of dues only to national headquarters.
- Checks for charter fees and dues can be submitted together.
- Membership applications or transfer forms for each charter member. Check to make sure that names and addresses on the charter application and new member applications correspond.
- If an inscribed roll is requested, a typed list of names as they are to appear on the charter roll
 - Setup fee for each inscribed roll is \$10.00 for 20 names and \$.50 for each additional name.

NOTE: *The department must verify that all required information, forms, and payments are correct before forwarding items listed above to:*

American Legion Auxiliary National Headquarters
ATTN: Membership Division
3450 Founders Rd. Indianapolis, IN
46268

National Headquarters will return the completed charter to the appropriate department headquarters for its signature.

FAQ 1: Must a potential member join the Unit to the Post of which their service relative is a member?

RESPONSE: No, the potential member is eligible for membership in any Auxiliary unit.

FAQ 2: In a same-gender marriage, if the spouse wartime veteran is a member or eligible to be a member of The American Legion, is their spouse eligible for membership in the Auxiliary?

RESPONSE: On June 26, 2015, the United States Supreme Court issued a landmark decision in the case of Obergefell v. Hodges. The Court's ruling requires a State to license a marriage between two (2) people of the same sex and to recognize a marriage between two (2) people of the same sex when their marriage was lawfully licensed and performed out-of-State.

This decision requires all states to recognize same-gender marriages. The Legion and the ALA will continue to accept into membership those individuals who meet membership eligibility criteria regardless of the gender of their spouses. **FAQ 3:** Can the eligibility of a member be questioned/challenged?

RESPONSE: Any member can challenge the membership eligibility of another member by presenting the challenge to the unit to whom the member being challenged belongs or to whom the person's membership application is being presented for consideration.

The unit has the responsibility for responding to the challenge of membership ineligibility and for making a determination on that person's eligibility. If the unit determines that the member is not eligible, the member may appeal to the department. If the unit determines that the member is eligible, the person challenging that member's eligibility may appeal to the department. The department is the final authority on determining an individual's membership eligibility.

Also note that a unit's or department's decision regarding an individual's membership eligibility is not appealable to the national organization. The national organization has no authority to consider eligibility or discipline appeals from members. The department is the final authority on eligibility and discipline.

FAQ 4: Can the daughter of a female veteran (who is currently living) become a member of the ALA if her mother is not a current member of The American Legion?

RESPONSE: No, the daughter can only join the ALA based on her mother's service and membership in The American Legion. If the mother were to join the Legion, then the daughter would be eligible for membership in the ALA.

FAQ 5: Is there any circumstance where a woman could join the ALA without having a relative as current member of The American Legion?

RESPONSE: **There are two circumstances** when a woman can become a member without having a relative as a current member of The American Legion. The first circumstance would be when the woman has served in the military during the requisite dates. She may join the ALA without being a member of the Legion. The second circumstance is when membership is based on a deceased veteran who was not a member of The American Legion; however, the prospective member will be

required to provide verifying documentation of the deceased relative's service dates to prove ALA eligibility.

FAQ 6: Is verification required by the Post Adjutant/Officer if the veteran through whom an applicant is applying is deceased?

RESPONSE: All ALA applications should be signed by the Post's Adjutant/Officer. The officer's signature is to verify he/she has confirmed the veteran's current status in The American Legion (if living) or to verify the applicable military documentation for the veteran through which the applicant is joining (if the veteran is deceased). However, the determination of whether the unit wishes to accept the applicant lies solely with the unit. The only exception to this is if the member is a female veteran and eligible in her own right, the Auxiliary unit officer can sign off on the application.

FAQ 6: If an ALA member works for an assemblyman, can the member run for county/district office in the ALA?

RESPONSE: There is no inherent conflict solely because the person is serving in public office. There are no national ALA or Legion restrictions from holding public office or working for a public official and holding an ALA office.

FAQ 7: Are step-relatives eligible to join the ALA?

RESPONSE: No, IRS regulation for 501(c)(19) organizations do not include step-relatives in their definition of an auxiliary organization

FAQ 8: Why is membership limited to two degrees of consanguinity (relation)?

RESPONSE: The IRS regulation concerning auxiliaries to veteran service organizations states in part: "At least 75 percent of its members are veterans, spouses of veterans, or related to a veteran within two degrees of consanguinity (i.e., grandparent, brother, sister, grandchild represent the most distant allowable relationships)."

This means that no great or great-great-granddaughters can join the Auxiliary. Current members whose eligibility relationship is great-granddaughter, great-great-granddaughter or direct descendent can continue being a member, as long as their dues are kept current.

FAQ 9: The Auxiliary Unit no longer has an American Legion Post, so who would sign the Auxiliary membership application?

RESPONSE: If a post officer's signature cannot be obtained, a letter from the Department Adjutant in which the service relative has his/her Legion membership will be accepted in lieu of the post officer's statement. A copy of this letter must be attached to the application.

FAQ 10: How long must units retain membership applications?

RESPONSE: Since eligibility for membership can be challenged at any time during the life of the member, eligibility information should be retained as long as the member is alive. Eligibility information needs to be securely retained, and records can be digitized to save space and provide a

more convenient way to retain the information. Units are advised to have access to a locked file cabinet in the post or other secure place for record retention and to redact (permanently cover) any personal identifying information (birthdates, social security numbers, etc.) in order to protect from identity theft.

Counsel General notes that in recent years, the IRS has been more stringent about demanding to see eligibility records when they are doing field audits of posts, units and departments. The fact that the IRS has escalated its audits of Legion and ALA entities in recent years may lead to confusion about the length of time for retaining IRS records versus the length of time for retaining eligibility verification records. Counsel General has advised that tax returns need be kept for only seven (7) years, but eligibility records should be retained for the life of the member.

FAQ 11: Are men now eligible to join the Auxiliary?

RESPONSE: Male spouses of current members of The American Legion are eligible to join the Auxiliary. Male spouses of all men and women who served in the eligible periods and died in the line of duty or after honorable discharge are eligible to join the Auxiliary. Grandfathers, fathers, uncles, brothers, or other male descendants are not eligible to join the Auxiliary.

FAQ 12: Are transgendered individuals eligible for membership in the ALA?

RESPONSE: Gender is determined by the gender specified on the person's driver's license/state identification or other legal document verifying gender at the time the ALA applicant's membership eligibility is determined.

FAQ 13: Is an individual eligible through the war service of a divorced spouse?

RESPONSE: A divorced person does not occupy the status of spouse and, therefore, has no eligibility. But the fact that a member of the Auxiliary has become divorced from the person whom they gained eligibility does not force them to surrender Auxiliary membership, even if they remarry. However, if they become delinquent, they may reinstate their membership only by payment of back dues for all years of delinquency or by establishing new eligibility.

FAQ 14: Is a common-law spouse eligible through the war service of their common-law spouse?

RESPONSE: No, IRS definition of spouse does not recognize common-law spouses. The IRS defines the terms spouse, husband, and wife to mean an individual lawfully married to another individual.



OFFICE OF THE
NATIONAL JUDGE ADVOCATE

LEGAL OPINION
DEFINITION OF "SPOUSE" FOR AMERICAN LEGION AUXILIARY ELIGIBILITY
KEVIN J. BARTLETT, NATIONAL JUDGE ADVOCATE
September 5, 2019

Issue: Is the non-veteran domestic partner, or non-veteran individual in a civil union, eligible for membership in the American Legion Auxiliary after the changes made at The American Legion's 101st Convention?

Per the Internal Revenue Service (IRS) regulation for 501(c)(19) an organization may be exempt under section 501(c)(19) as an auxiliary unit if it meets the following requirements:

1. It is affiliated with, and organized in accordance with the bylaws and regulations of, a veterans' post or organization described above;
2. At least 75 percent of its members are veterans, spouses of veterans, or related to a veteran within two degrees of consanguinity (i.e., grandparent, brother, sister, grandchild represent the most distant allowable relationships) [underline added];
3. All members are either members of a veterans' post or organizations described above, or spouses of a member of such post or organization, or are related to a member of such post or organization within two degrees of consanguinity [underline added]; and
4. No part of its net earning inures to the benefit of any private shareholder or individual.

The term "spouse" and the term "husband and wife" – as defined in 26 CFR Section 301.7701-18 – means an individual(s) lawfully married to another individual(s). A marriage of two individuals is recognized for federal tax purposes if the marriage is recognized by the state, possession, or territory of the United States in which the marriage is entered into, regardless of domicile. Marriages in foreign jurisdiction are recognized if the relationship would be recognized as a marriage under the laws of at least one state, possession, or territory of the United States, regardless of domicile.

This IRS regulation concludes that the terms spouse, husband, and wife do not include individuals who have entered into a registered domestic partnership, civil union, or other similar formal relationship not denominated as a marriage under the law of the state, possession, or territory of the United States where such relationship was entered into, regardless of domicile. The term husband and wife does not include couples who have entered into such a formal relationship, and the term marriage does not include such formal relationships.

The American Legion is a federally chartered organization that follows federal laws. Therefore this means the individual non-veteran in these non-recognized relationships – domestic partnerships, civil unions, or other similar formal relationship not denominated as a marriage – are not American Legion Auxiliary member-eligible by the new eligibility change.

American Legion Auxiliary Department Operations Guide, published April 25, 2014.

UPDATE HISTORY:

#	Date	Author(s)	Description (Substantive or Proofing)
01	07/21/2014	NHQ Communications	Proofing: Cover added, footers edited
02	11/17/2016		Updates: Executive; Sec. 1; Sec. 2; Sec. 3; Sec. 5; Sec. 6
03	02/1/2021	NHQ Membership, Governance	Revision including Legion Act and inclusion of male spouses