

Department Training 2023 - 2024



floridalegion.org

“By my example, and through passion and conviction, I will inspire all veterans to continue their noble service to this great nation by membership in The American Legion.” author unknown

Table of Contents

• History of The American Legion	Slides	5 - 24
• Protocol	Slides	25 - 41
• How to Run an Effective Meeting	Slides	42 - 60
• Post Commander	Slides	62 - 73
• Post Adjutant	Slides	74 - 93
• Vice Commanders	Slides	94 - 99
• Sergeant at Arms	Slides	100 - 105
• Finance Officer	Slides	106 - 116
• Judge Advocate	Slides	117 - 131

Overview

- **History of The American Legion**
- **Mission & Vision Statement**
- **Four Pillars of The American Legion**
- **Preamble to the Constitution**
- **Protocol**
- **Our Role as American Legion Leaders**

History of The American Legion



Mission & Vision Statement

To enhance the well-being of America's veterans, their families, our military, and our communities by our devotion to mutual helpfulness. The American Legion's vision statement is "The American Legion: Veterans Strengthening America." The American Legion's value principles are as follows:

A Veteran is a Veteran

Selfless Service

American Values & Patriotism

Family & Community Engagement

Advancing the Vision

Honor Those Who Came Before Us



Preamble to the Constitution

"For God and Country, we associate ourselves together for the following purposes: To uphold and defend the Constitution of the United States of America; to maintain law and order; to foster and perpetuate a 100-percent Americanism; to preserve the memories and incidents of our associations in all wars; to inculcate a sense of individual obligation to the community, state and nation; to combat the autocracy of both the classes and the masses; to make right the master of might; to promote peace and good will on earth; to safeguard and transmit to posterity the principles of justice, freedom and democracy; to consecrate and sanctify our comradeship by our devotion to mutual helpfulness."

**FOR GOD AND COUNTRY, WE ASSOCIATE
OURSELVES TOGETHER FOR THE
FOLLOWING PURPOSES...**

**TO UPHOLD AND DEFEND THE
CONSTITUTION OF THE UNITED STATES OF
AMERICA...**

TO MAINTAIN LAW AND ORDER...

**TO FOSTER AND PERPETUATE A 100
PERCENT AMERICANISM...**

**TO PRESERVE THE MEMORIES AND
INCIDENTS OF OUR ASSOCIATIONS IN
ALL WARS...**

**TO INCULCATE A SENSE OF
INDIVIDUAL OBLIGATION TO THE
COMMUNITY, STATE AND NATION...**

**TO COMBAT THE AUTOCRACY OF
BOTH THE CLASSES AND MASSES...**

**TO MAKE RIGHT THE MASTER OF
MIGHT...**

**TO PROMOTE PEACE AND GOOD WILL
ON EARTH...**

**TO SAFEGUARD AND TRANSMIT TO
POSTERITY THE PRINCIPLES OF
JUSTICE, FREEDOM AND
DEMOCRACY...**

**TO CONSECRATE AND SANCTIFY
OUR COMRADESHIP BY OUR
DEVOTION TO MUTUAL
HELPFULNESS**

Four Pillars of The American Legion



I. Veteran Affairs & Rehabilitation

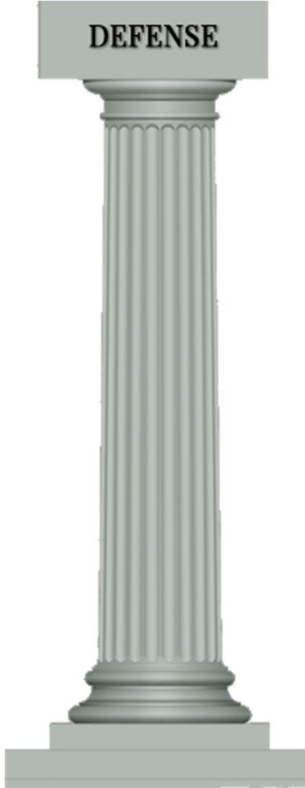
- VA Claims Backlog
- Access to VA Health Care
- A Better Funding Formula for VA Health Care
- Veterans w/ Special Needs
- Volunteering
- Final Respects
- Transition Assistance
- Homelessness
- GI Bill
- Employment, Business & Education

VETERANS

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II. National Security

- Increase the size of the Armed Forces
- Quality of Life for Servicemembers, retirees and military families
- Homeland Security
- Foreign Relations
- Full Accounting of POW/MIAs



DEFENSE

III. Americanism

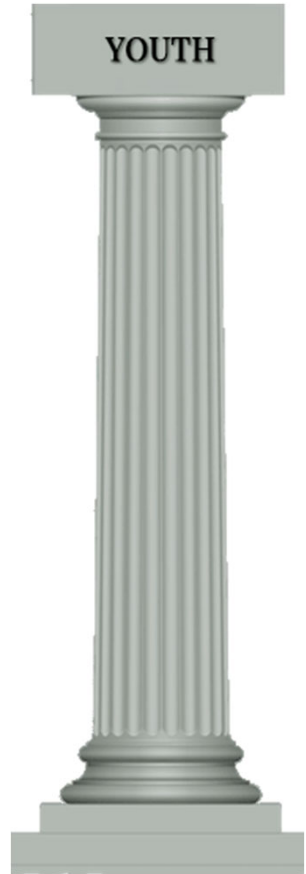
- U.S. Flag Protection
- Illegal Immigration
- Voter Registration
- Boy Scouts of America
- The Pledge of Allegiance
- Establishment-Clause Lawsuits
- The American Legion Legacy Run
- Boys State & American Legion Boys Nation
- American Legion Baseball

AMERICANISM

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IV. Children & Youth

- Family Support Network
- Temporary Financial Assistance
- The Samsung American Legion Scholarship
- Child Welfare Foundation





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Protocol



Overview

- **Why is Protocol Important**
- **Ceremonies**
- **Flag Etiquette**
- **Order of Introductions**
- **Cap Etiquette**

Protocol is...

To assist and guide those that are responsible for planning and conducting American Legion meetings, ceremonies and functions to achieve successful outcomes for these events.

Why is protocol important?

- By following established protocols, it enables functions to proceed smoothly and predictably and serves to enhance the image of both the host organization and The American Legion, Department of Florida.

Ceremonies

- POW/MIA Empty Chair Ceremony
- POW/MIA Remembrance Ceremony
- Initiation of New Members
- Installation of Officers
- Dedications
- Military Funeral with Honors
- Draping the American Legion Charter
- Flag Ceremonies
- Gold Star Banner Ceremony
- Patriotic Holidays Ceremonies
- Traditional Method of Folding the U.S. Flag

Hallowed Ground

When flags are in place and posted, no person is to reach between the flags “Hallowed Grounds” to hand or receive items from the speaker or table.



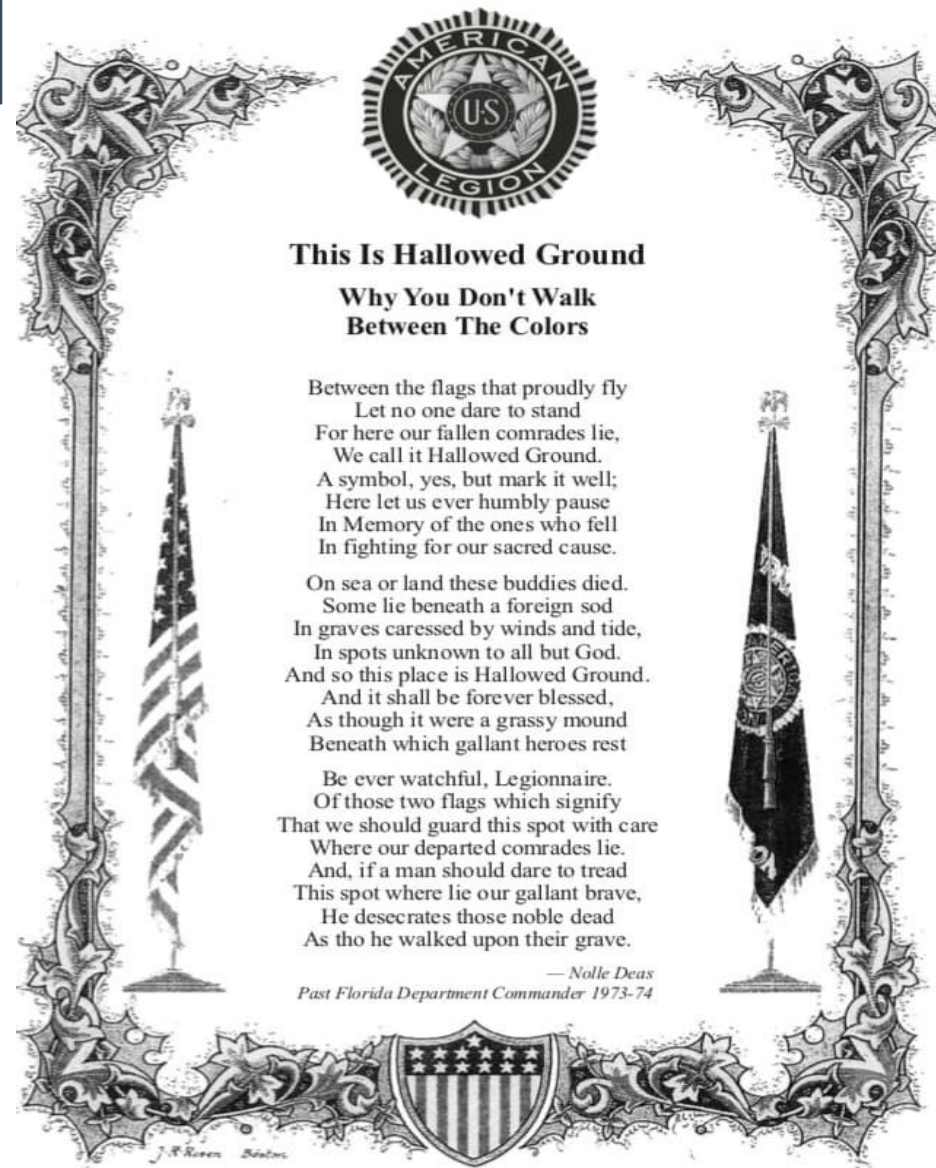
This Is Hallowed Ground Why You Don't Walk Between The Colors

Between the flags that proudly fly
Let no one dare to stand
For here our fallen comrades lie,
We call it Hallowed Ground.
A symbol, yes, but mark it well;
Here let us ever humbly pause
In Memory of the ones who fell
In fighting for our sacred cause.

On sea or land these buddies died.
Some lie beneath a foreign sod
In graves caressed by winds and tide,
In spots unknown to all but God.
And so this place is Hallowed Ground.
And it shall be forever blessed,
As though it were a grassy mound
Beneath which gallant heroes rest

Be ever watchful, Legionnaire.
Of those two flags which signify
That we should guard this spot with care
Where our departed comrades lie.
And, if a man should dare to tread
This spot where lie our gallant brave,
He desecrates those noble dead
As tho he walked upon their grave.

— Nolle Deas
Past Florida Department Commander 1973-74



Passing of the Flag

- Render a salute when the flag is hoisted, lowered, or passes in a parade or review
- Veterans not in uniform may render a salute
- All others should place right hand over heart, or remove hat and place over heart

National Anthem

- Same procedures as when the American flag passes by
- Render salute at first note: hold until last note
- You may sing the National Anthem while saluting
- If flag is not present, face toward the music
- No singing of the National Anthem when the cap is worn

Order of Introductions:

- I. **Local dignitaries, non-American Legion guests**
- II. **S.A.L. Officers** – Local, District, Department, National
- III. **Auxiliary Officers** – Local District, Department, National
- IV. **American Legion Officers** – Local, District, Department, National American Legion Officers are usually introduced in the order by which they're installed into office: Sergeant-at-Arms, Service Officer, Historian, Judge Advocate, Chaplain, Treasurer, Adjutant, Vice Commander, Commander (After the Commander the Honored Guest if applicable)

Order of Introductions: Head Table

- Generally done by the Master of Ceremonies
- Order of introduction starts with speaker's extreme left, working toward the center, then with speaker's extreme right, working toward the center
- Introductions should be brief – names and titles/functions.
Refrain from lengthy introductions of anyone

Presentations of Gifts

- If gifts are presented during the function, the order of presentation is: S.A.L. Detachment Commander, Department Auxiliary President, Department Commander, and/or National Commander

American Legion Cap

- Considered in uniform when wearing the cap
- Some Departments' adopted uniform is cap, dark blue or black jacket, gray pants, white shirt, tie, black shoes
- Cap colors denote organization level of current position
- Left side—nothing other than lettering of post, county, district, department, or national
- Right side—post number, American Legion and military pins, NO other organizational pins, NO nickname

When to Wear the Cap

- Attending American Legion Family functions
- Representing The American Legion

When to NOT Wear the Cap

- Memorial Services, except Honor Guard (remove when sitting)
- During the Pledge of Allegiance and prayer
 - Hold over heart with American Legion emblem at top and outward
 - Do not salute and say the pledge
- When eating
- At partisan political event

Caps and Female Legionnaires

- May wear regular or women's style cap
- Wear the cap as prescribed by the armed forces
- May leave cap on during pledge, anthem, prayers, and meals

Our role as American Legion Leaders

- **Become better leaders—read, study, practice**
- **Identify and mentor future leaders**
- **Remember, You represent The American Legion by your words and actions**
- **Be proud of being a leader; *Proud to be Legion***



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How to Run an Effective Meeting



Overview

- **Purpose**
- **Resources**
- **Preparation**
- **Conduct During the Meeting**
- **Conducting the Meeting**

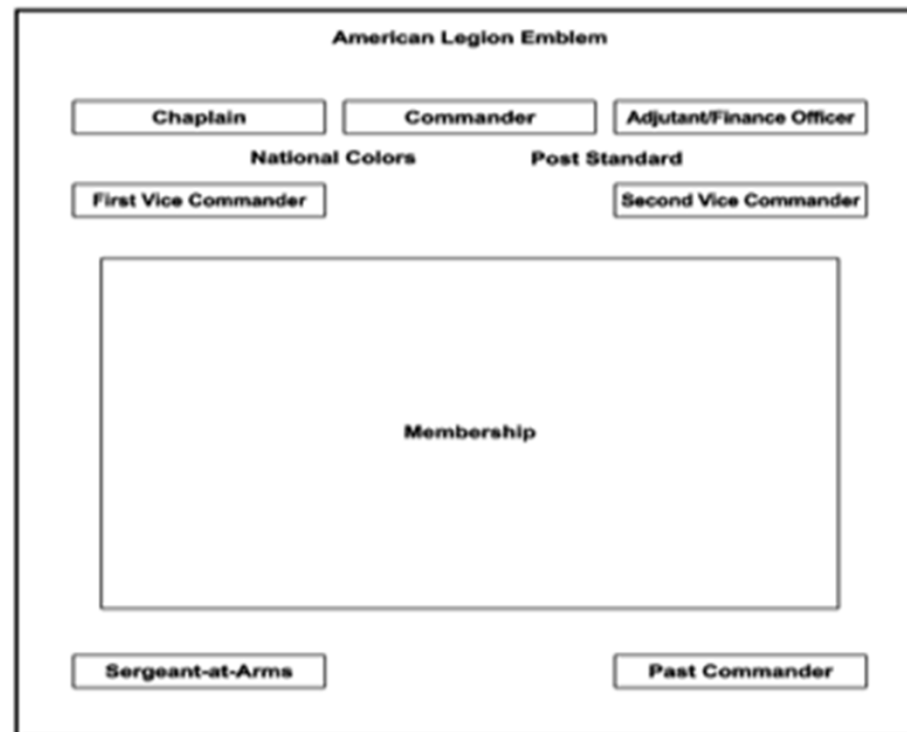
Essential Tools

- Officers Guide & Manual of Ceremonies
- District Commanders Guide
- Constitution and Bylaws
- Roberts Rules of Order (Current Edition)
- List of Officer's and Committee Chairs
- Minutes of Previous Meetings
- Agenda
- Script

Preparing for a Meeting

- Gather Agenda Items
- Publish Agenda
- Send out a Reminder
- Set Up the Space

Set Up Meeting Room



Parliamentary Procedures

- Keep an Orderly process
- Expedite business
- Keep the organization focused on its goals and principles
- Understand the basics – get the Robert's Rules of Order Book or Pamphlet

Motions

1. Obtain the Floor
2. Make the Motion
3. Second the Motion
4. State the Motion
5. Discussion
6. Put the Question
7. Announce the Vote



Amendments

After a motion has been stated to the assembly by the presiding officer, it may be desirable to change it in some way, this is called an amendment.

An amendment may be offered in any of the following forms: “I move to amend by inserting,” or “adding” if at the end of the motion, and “I move to amend by striking out and inserting,” or “by substituting” in case of an entire resolution, by-laws or paragraph.

Nominations

- Always refer to your Constitution & By-Laws; these rules **MUST BE** adhered to. If the election rules prove unsatisfactory, amend them. But abide by them as they are, until properly amended
- It is customary for nominations to be made from the floor or by a nominating committee, or by ballot
 - Only members of the organization can make the nomination
 - Must have the consent of the nominee

Nominations by Committee

This committee should be named at least one month before election day and the by-laws should provide the method of appointing (or electing) the committee.

Closing Nominations

- Nominations from the floor may be closed by a two-thirds vote or the commander may close nominations by unanimous consent of the assembly
- A member may be nominated for more than one office, unless the by-laws forbid. If elected to more than one office the member must choose immediately on which office to serve. The other office (or offices) shall be filled according to the provisions of the by-laws, if simultaneous service in more than one office is forbidden

Elections

- **Election by Voice** – Vote must be taken on each candidate separately, or the assembly may, by a majority vote, order the vote be taken on the ticket when there is only one candidate for each office
- **Election by Ballot** - Ballots should be given to identified voting members only. The names of candidates for each office may be printed or written on the ballot, or the voter may write the name of choice on the ballot

Conduct During the Meeting

- Uniform of the Day
- Late Arrival to Meeting
- Cell Phone Etiquette
- How to ask Questions or Make Comments

Opening Ceremonies

- Salute the colors
- Prayer
- POW/MIA remembrance
- Pledge of Allegiance
- Recite the Preamble to The American Legion Constitution

Order of Business

- Call to Order (Opening, Roll Call, Minutes, Correspondence)
- Introduction of Guests/Officers
- Finance Report
- Chairman / Committee Reports



Order of Business (2)

- Unfinished Business
- New Business
- Program – Training / Presentation, etc...
- For Good of the Legion
- Adjournment

Closing the Meeting

- Prayer
- Recovery of the POW/MIA Flag
- Salute / Retire the Colors
- Closing Remarks

The Chair's Role

- Take charge and stay in charge
- Ensure everyone is allowed to speak
- Keep the discussions on track
- Save new or unrelated issues for the final part of the meeting – For the Good of the Legion



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Post Officers Duties & Responsibilities

- Commander
- Adjutant
- Vice Commanders
- Sergeant-at-Arms
- Finance Officer
- Judge Advocate

Post Commander



Overview

- **Purpose**
- **Preparation**
- **Resources**



“To you is entrusted a very important duty of teaching and protecting the cardinal principles of The American Legion throughout your entire post. To you is entrusted supervision of the duties of all other officers of this post. To you may come the needy and the distressed, and it is your duty to see no worthy person is turned away without full justice. It is your duty to see freedom is ever the watchword of those with whom you may come in contact. Loyalty to your post, to its membership, to the state and to the national organization are obligations which you now assume. You are more than the presiding officer for meetings. You are guided by the constitution and by the decisions of the post as a body, yet the responsibility for the success of the year’s program is largely on your shoulders. You must initiate and carry through programs to completion. You must thoroughly familiarize yourself with the policies and traditions of your post and of The American Legion. By your sincere acceptance and earnest performance of these duties, may the great trust which your fellow members have reposed in you be justified.

To be a Successful Commander

- Be Honest
- Be Ambitious
- Be Enthusiastic
- Be Curious
- Be Poised
- Be Self-Confident
- Know the Programs
- Look the Part; Act the Part

What do I do First?

- Find / read Post Constitution & Bylaws
- Review previous minutes for Post Meeting
- Review Financial Reports
- Communicate with other Posts Commanders
& District Officers.



Assess the Situation

- What is the overall health of the Post?
- What Goals does the Post have?
- What does the community think of the Post?
- What Legion programs does the Post support?

Self Assessment

- Are you prepared to lead the Post?
- Do you know your Post members?
- Do you understand the Legion values and purposes?
- How much do you know about Legion Programs?



Essential Tools

- Officers Guide & Manual of Ceremonies
- Post Constitution and Bylaws
- Department Administrative Manual
- Roberts Rules of Order (Current Edition)
- Adjutants Guide
- District Commanders Guide
- Previous Minutes
- Previous Financial Reports
- Past Consolidated Post Reports

Post Commanders Role

- Leadership
- Positive Attitude
- Energy
- Enthusiasm
- Passion
- Knowledge



Take Care of the People



- Recognize those who do good things!
- Submit people for awards at District and Department levels
- Submit the Post for awards

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Reality

- You can not do it all
- No one is indispensable
- We are all volunteering time and talents
- Everyone in the group must be involved
- Encourage, teach, mentor, and develop
- Believe in yourself
- Delegate and empower





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Post Adjutant



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Overview

- **Post Adjutant Tools**
- **Post Adjutant's Manual**
- **Meeting Minutes**

“My comrade, you have chosen to assist your Commander in the wise and effective administration of that office and to serve not only your fellow Legionnaires, but also those whose relationship to the organization has led them to look for us for guidance and relief. You will find the duties many, varied, and at times taxing of your crowded hours and resources. The successful accomplishment of our programs depends, to a great extent, upon you and your performance of the duties of your office.”

The Ideal Adjutant

Post Adjutant Tools

- Post Adjutant's Manual
- Officer's Guide and Manual of Ceremonies
- Public Relations Toolkit
- District Commanders Guide
- Department Membership Manual
- Four Pillars booklet
- Past post records will give insight into the post's policies and traditions
- Department Headquarters and staff can be useful tools

Post Adjutants Roles & Responsibilities

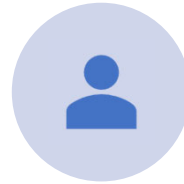
- Typically retained for several years
- Provides continuity
- Personnel officer
- Keeps records and minutes of meetings
- Provides direction to new officers and committees
- Convey information & instructions to members through regular communication



Post Charters



Naming a post



Change of post name



Location change



Temporary and permanent charters



Supplemental charters



Tax-exempt status

Ensure Proper Documents have been filed such as but not limited to:

- Incorporation Papers
- Annual 990
- Tax Exempt
- Employer Identification Number (EIN)
- Post Constitution and By-Laws

Post Officer Certification

- It is critical for the post adjutant to report all post officers to Department Headquarters immediately after elections



Post Program Chair Form

- Complete this form and return them to Department Headquarters. Your Post chairpersons will not receive the necessary information for their program until this is received. Due to Department no later than September 1, 2023

Annual Post Data Report

- In February, the annual Post Data Reports is mailed to Department Headquarters for distribution to Posts
- Report any changes to Department Headquarters



Consolidated Posts Reports

- Established in 1975 to help Departments document activities posts have done during the 12-month reporting period
- Most important report a Post may submit all year
- Paper copy may be sent to each post from Department Headquarters
- Can be filed electronically on myLegion.org
- May also be downloaded under “Internal Affairs” at www.legion.org/publications

Meeting Minutes

- Written/recorded documentation that is used to inform attendees and non-attendees about what was discussed and what happened during a meeting
- Document the key ideas or discussion points that led to a decision
- Serve as a reminder of the commitments team and committee members made during the meeting

Motions & Discussions

Document the following:

- The names of the people proposing any action, stating an option or making a motion
- Take down word-for-word any motions, resolutions, amendments, decisions or conclusions
- Who seconded the motion
- Whether the motion is approved, defeated, or withdrawn
- What assignments were made and to whom

Prior to Voting the Adjutant Should ...

- Help the Commander keep track of proposed amendments
- Either the Chair (Commander) or Adjutant should restate the motion, and any amendments, prior to a vote
- Be most careful in clarifying any point of controversy
- Adjutant should ask questions of the Chair regarding the subject or discussion if he/she becomes lost or unsure



Meeting Minutes Should Include:

- Type of Meeting
- Date, Time, & Place
- List of Officers Present & Absent
- Time Meeting was called to Order
- Approval and/or Amendments to previous minutes
- General Matters
- Reports from standing and special committees

Meeting Minutes Should Include:

- Old Business
- New Business
- For Good of the Legion
- Time of Adjournment
- Adjutants Name & Signature



Approving Minutes:

- The motion, “*The minutes have been read or distributed, are there any corrections?*” If corrections are offered, the adjutant handles each by offering the correction to the membership. When no (further) corrections are offered, the presiding officer says, “*If there are no (further) corrections ... (pause)... the minutes are approved as read / distributed / corrected.*”

Reality

- **An effective adjutant can provide stability and continuity to a Post**
- **An effective Post Adjutant must know more than the basic administrative tasks of the job**
- **In many ways the Post Adjutants Position is one of the most important positions within The American Legion!**



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Post Vice Commanders



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“To you is given the responsibility of an active cooperation between yourself and the commander. Particularly should you interest yourself in the membership of the post. You should be assisted by the most active and devoted members. No single factor has so important an influence on the post’s success as membership. You will be the exponent of means of safeguarding the honor of the flag of our country. To you are committed these endeavors with the expectation you shall fulfill each one of them. You are the teacher of democracy.”

1st Vice Commander Role

- Generally, the 1st Vice Commander is responsible for retention & membership
- Must be familiar ceremonial protocol for regular meetings to stand in the absence of Post Commander

“Into your helpful hands are placed the important responsibilities of assisting the commander’s office in all duties. Particularly should you be interested in patriotic observances of all kinds, in developing post activities, and in the entertainment features, which mark all meetings. Help to observe strict tolerance among your members on all political, religious and civic matters. The application of justice will be your particular concern.”

2nd Vice Commander Role

- Responsible for building an atmosphere where Legionnaires have fun while completing the mission of The American Legion Post
- Help run operations to spice up meetings and attract members to the post
- Looking for ways to involve members in post activities, operations and programs while assisting the first vice commander with retention



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Post Sgt at Arms



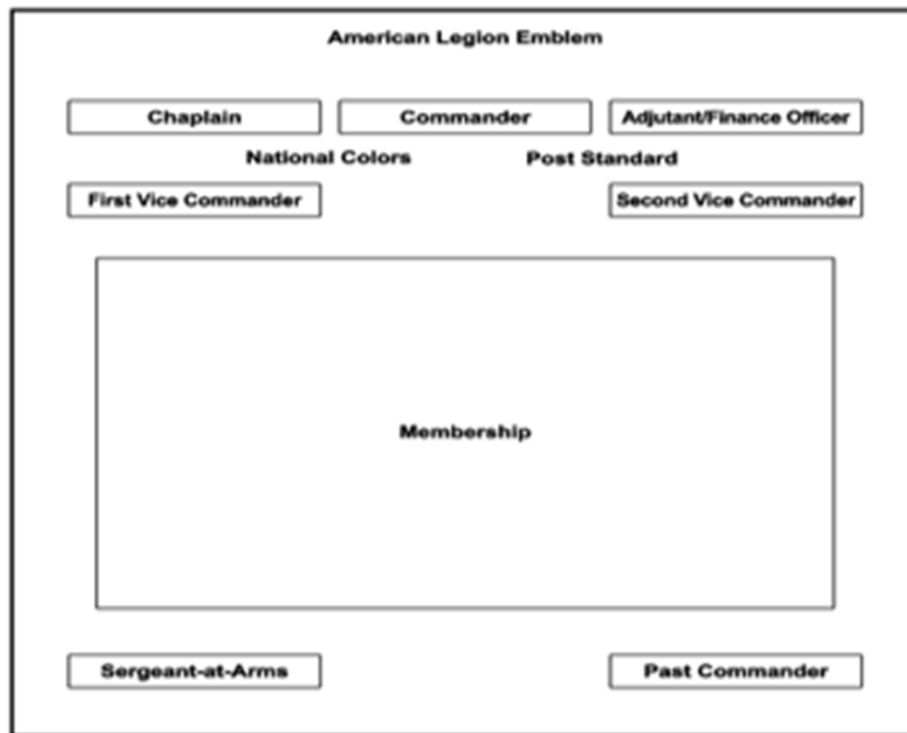
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“You are the sentinel or tiler, the outer guard of this post. You will guard especially against the loss of one of The American Legion’s greatest possessions: our deep and abiding spirit of comradeship. You will learn the identity of, and introduce to the commander, all visiting members and guests of the post. You are responsible that no one shall remain a stranger in our midst. Be ready at all times to assist your commander. Into your hands is given charge of the stand of colors, which you will properly display at all post meetings and on ceremonial occasions.”

Duties & Responsibilities

- Sergeant-at-Arms should know how to set up the meeting hall for all meetings, including custodian of the colors
- Sergeant-at-Arms must make certain new members are welcomed, introduced and made to feel that they are important to the post
- Sergeant-at-Arms should meet with Post Commander prior to the meeting and see if any guests are expected, any special requirements they may have to set the meeting room up properly

- Serves with the Commander and Parliamentarian in order to insure an orderly atmosphere during meeting
- Announce the meeting is about to begin to ensure all members are making their way to the meeting
- Escort guests and speakers to the podium



Set Up Room

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Post Finance Officer



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Overview

- **Roles & Responsibilities**
- **Paying Monthly Bills**
- **Tracking Expenses**
- **Licenses / Certificates**

“You are the keeper of the moneys, and in you is reposed the financial policy of the post. To you is given charge of the year’s budget, and to you is given the duty of the payment of all obligations when proper authorization has been given for such payment. Your position is an important one, demanding integrity and honesty. Your election to this office signifies your fellow members’ implicit trust in you. Guard well that trust.”

Finance Officer Role:

- The Legion defines this position as a person of proven integrity & experience in handling financial affairs
- A Finance Officer can be an appointed and/or a paid position of a non-legionnaire (refer to your Constitution & By-laws). If this is the case for your Post the Finance Officer will work with the Legionnaire elected as Finance Officer to present reports and bank balances at the monthly meetings



Finance Officer Responsibilities

- Monthly responsibilities included, but are not limited to:
 - Writing Check/Paying Invoices
 - Banking - Expenses & Deposits
 - Tracking Expenses
 - Working in connection with accountant
 - Ensure Licenses & Certificates are up to date
 - **Must** report monthly to the membership

Writing Checks/Paying Invoices

- **All invoices/receipts will be reviewed by the Finance Officer and/or the Commander.**
 - No payments are given out without proper invoice/receipt submitted for reimbursement. No receipt, no payment
- **Reoccurring Monthly payments.**
 - Electric, Cable/Internet, & Security System, etc.
 - Liquor/Beer invoices



Bank Account Expenses & Deposits

- **Three bank accounts – This separates day to day expenses from membership and charity.**
 - **Canteen Account**
 - Expenses paid from this account include; Everyday operating cost: Utilities, Canteen supplies, Post supplies and Maintenance cost
 - Deposits
 - Profit made from Canteen sales
 - **Charity Account**
 - Expenses paid from this account include:
 - Only Donations
 - Deposits
 - Profit from Pull Tabs or Bingo
 - **Membership Account** (This account should never go below a designated number. Ex: \$2800)
 - Expenses paid from this account include:
 - Legion Membership dues
 - Deposits
 - Payment for Legion membership ONLY

Tracking Expenses & Reporting

- Monthly – Download bank statements in excel format (All 3 accounts are done similar to example below:

Account	Posted Date	No.	Description	Debit	Long Description
Bar Account	2/9/2023		Bjs.com	\$ 296.26	Bar Supplies
Bar Account	2/21/2023		Sam's Club	\$ 51.52	Bar Supplies
Bar Account	2/21/2023		Sam's Club	\$ 283.82	Bar Supplies
Bar Account	2/10/2023		North Florida Sa Fintecheft Ja	\$ 1,292.20	Beer/Liquor
Bar Account	2/14/2023		Champion Brands Fintecheft Jac	\$ 916.19	Beer/Liquor
Bar Account	2/6/2023		Republic Nationa Fintecheft Ja	\$ 975.34	Beer/Liquor
Bar Account	2/6/2023		Southern Glazer's Wine & Spiri	\$ 1,073.40	Beer/Liquor
Bar Account	2/13/2023		Southern Glazer's Wine & Spiri	\$ 491.00	Beer/Liquor
Bar Account	2/1/2023	2029	D J - Karaoke	\$ 150.00	Entertainment
Bar Account	2/7/2023	2032	D J - Karaoke	\$ 150.00	Entertainment
Bar Account	2/16/2023	2033	D J - Karaoke	\$ 150.00	Entertainment
Bar Account	2/10/2023	2034	CHECK #2034	\$ 256.05	Kitchen Supplies
Bar Account	2/2/2023		Jckjacksonvillemens Ctops	\$ 60.00	Maintenance - Lawn
Bar Account	2/17/2023		Jckjacksonvillemens Ctops	\$ 60.00	Maintenance - Lawn
Bar Account	2/23/2023		Bug Out Service	\$ 32.25	Maintenance - Pest Control

No	Description	Debit	
	Bjs.com	\$ 296.26	Bar Supplies
	Sam's Club	\$ 51.52	Bar Supplies
	Sam's Club	\$ 283.82	Bar Supplies
		\$ 631.60	
	North Florida Sa Fintecheft Ja	\$ 1,292.20	Beer/Liquor
	Champion Brands Fintecheft Jac	\$ 916.19	Beer/Liquor
	Republic Nationa Fintecheft Ja	\$ 975.34	Beer/Liquor
	Southern Glazer's Wine & Spiri	\$ 1,073.40	Beer/Liquor
	Southern Glazer's Wine & Spiri	\$ 491.00	Beer/Liquor
		\$ 4,748.13	
2029	D J - Karaoke	\$ 150.00	Entertainment
2032	D J - Karaoke	\$ 150.00	Entertainment
2033	D J - Karaoke	\$ 150.00	Entertainment
		\$ 450.00	
2034	CHECK #2034	\$ 256.05	Kitchen Supplies
		\$ 256.05	
	Jckjacksonvillemens Ctops	\$ 60.00	Maintenance - Lawn
	Jckjacksonvillemens Ctops	\$ 60.00	Maintenance - Lawn
	Bug Out Service	\$ 32.25	Maintenance - Pest Control
		\$ 152.25	
	American Legion	\$ 107.13	Payroll
	American Legion	\$ 117.11	Payroll
	American Legion	\$ 1,526.36	Payroll
		\$ 1,750.60	
	Comcast	\$ 389.33	Utilities - Cable/Internet
	JEA	\$ 824.10	Utilities - Electric
	Waste Management	\$ 110.00	Utilities - Garbage
		\$ 1,323.43	

Tracking Expenses & Reporting (cont'd)

AMERICAN LEGION POST 88	
Profit & Loss - Feb 2023	
Income/Expense	
Income	
Bar Income	\$ 18,027.57
Interest Income	\$ 1.64
Total Income	\$ 18,029.21
Cost of Goods Sold	
Bar Supplies	\$ 631.60
Beer/Liquor	\$ 4,748.13
Kitchen Supplies	\$ 256.05
Total COGS	\$ 5,635.78
Gross Profit	\$ 12,393.43
Expenses	
Entertainment	\$ 450.00
Maintenance	\$ 152.25
Utilities	\$ 1,323.43
Payroll	\$ 1,750.60
Total Expense	\$ 3,676.28
Net Income	\$ 8,717.15

Licenses & Certificates

- Keep a list of all dates and amounts that are due
 - Liquor license
 - Health Permit
 - Amusement Machines
 - Business license (sunbiz.org)
- Create reminders in calendar
- Most can be setup through an online account
- Avoids late fees and/or expiration





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Post Judge Advocate



floridalegion.org

Overview

- **Roles & Responsibilities**
- **Complaint Procedures**
- **Trials & Appeals**
- **Rules Governing Trials**
- **Rules Governing Appeals**

“To you is assigned a most important duty for which your legal training and/or past Legion experience so aptly prepare you. You are the interpreter of the constitution and by-laws of your post and may at any time be called upon by the commander and other officers and members of the post to rule upon the legality of their actions and decisions insofar as they affect the good of The American Legion. You are also charged with protecting the integrity of our organization and keeping alight the torch of truth and fidelity that symbolizes the high and ennobling ideals under which our great American Legion was founded. Protect that heritage.”

Role

- Provide professional advice in the conduct of post business and to procure proper counsel
- Provide valuable assistance to committees and officers
- Commonly has the duties with others, of auditing post financial accounts

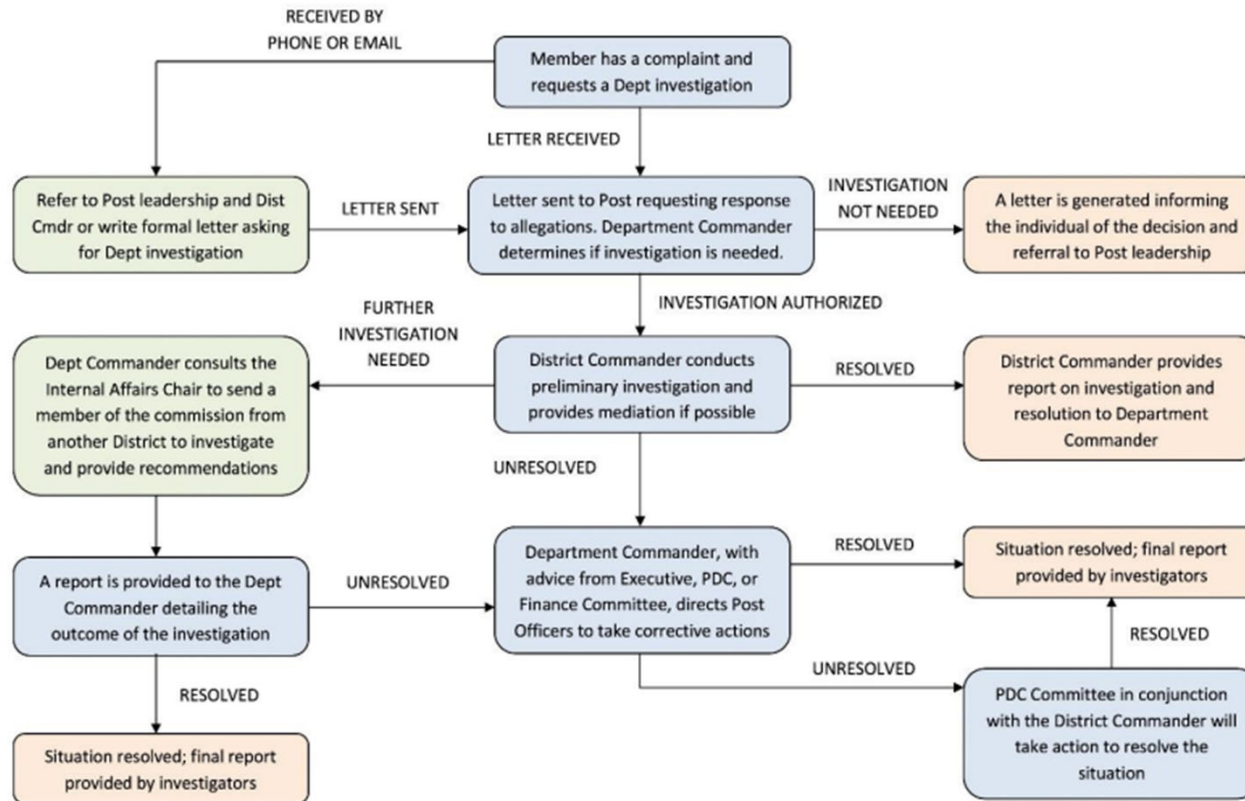
Complaint Procedures

- Often conflicts of personalities or different opinions on management styles will result in conflicts within the Post
- Should be handled at the lowest level, if possible



Post Investigation Flowchart

ByLaws Article IV, Section 7



If Complaint cannot be resolved at the Post Level then...

1. The Department Commander can direct a District Commander in which the Post is located to conduct a preliminary investigation into the affairs of the Post and to act, as a mediator if they determine that the problem is primarily one of conflict in personalities. A report of such investigation, including recommendations for further actions by officials of the Department, shall be rendered to the Department Commander.

If the initial investigation/mediation does not result in a solution to the problem, then...

2. Then the Department Commander, after consultation with the Chairperson of the Internal Affairs Commission, shall appoint a member of that Commission, not from the same District as the Post involved, to conduct a further investigation and to act as a mediator if they think this would be successful. A report of such investigation, including recommendations for further actions by officials of the Department, shall be rendered to the Department Commander

The logo for the American Legion, featuring a stylized American flag with red and white stripes on the left and the words "AMERICAN LEGION" in blue, bold, sans-serif capital letters on the right. The entire logo is enclosed in a dark blue rectangular border.

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- a. Based on this report, the Department Commander may detail accountants or auditors to investigate financial problems further. Should such further investigations reveal conditions that could jeopardize the continued existence of the Post, The Department Commander with the advice of the Department Executive Committee or the Finance Committee when the Department Executive Committee is not in session, shall advise the Post officers to take actions to ensure these conditions are alleviated.

Who is responsible for the cost of the investigation?

The Post is responsible for the cost of the investigations to include; travel expenses, lodging, and other expenses for the investigator(s), auditor(s), accountant(s), or other personnel.

The logo for the American Legion, featuring a stylized American flag with three red stripes and a blue field with white stars, followed by the text "AMERICAN LEGION" in a bold, blue, sans-serif font.

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Trials & Appeals

Members and Post Officers may be reprimanded, removed from office, suspended or expelled from The American Legion only upon proper showing or cause. Charges shall be based upon disloyalty, neglect of duty, dishonesty and/or conduct unbecoming a member of The American Legion.

Charges must be made under oath in writing by the accuser(s), and no member or Post Officer shall lose their membership or office until given a fair trial.

Rules Governing Trials

- Can be found on Pages 24-25 in Department of Florida Constitution & By-Laws adopted at the Department Convention of 1946 and Amended at Department Convention through 2023
- These rules **MUST** be followed precisely when conducting a trial. IF NOT, the accused may appeal the decision of the trial and the verdict overturned
- Questions or need assistance in conducting a trial, please contact the Department Headquarters



Rules Governing Appeals

- Can be found on Pages 25 in Department of Florida Constitution & By-Laws adopted at the Department Convention of 1946 and Amended at Department Convention through 2023
- Any appeal taken from a trial held within the jurisdiction of The American Legion, Department of Florida shall be governed by these rules
- Questions or need assistance in conducting a trial, please contact the Department Headquarters

A Path to Success

- **Successful Post Officers become knowledgeable District Officers**
- **Successful District Officers become key leaders at Department level or beyond**
- **Remember it all starts at the Post level**



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