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Department Training 2023 - 2024

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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

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History of The American Legion

The American Legion was chartered by Congress in 1919 as a patriotic veteran's organization. Focusing on service to veterans, servicemembers and communities, the Legion evolved from a group of war-weary veterans of World War I into one of the most influential non-profit groups in the United States. Membership swiftly grew to over 1 million, and local post sprang up across the country. Over the years, the Legion has influenced considerable social change in America, won hundreds of benefits for veterans and produced many important programs for children and youth.



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Mission & Vision Statement

A VETERAN IS A VETERAN - which means The American Legion embraces all current and former members of the military and endeavors to help them transition into their communities.

SELFLESS SERVICE - which means The American Legion celebrates all who contribute to something larger than themselves and inspires others to serve and strengthen America.

AMERICAN VALUES AND PATRIOTISM - which means The American Legion advocates for upholding and defending the United States Constitution, equal justice and opportunity for everyone and discrimination against no one, youth education, responsible citizenship and honoring military service by observing and participating in memorial events.

FAMILY AND COMMUNITY ENGAGEMENT - which means The American Legion meets the unique needs of local communities.

ADVANCING THE VISION - which means The American Legion educates, mentors and leads new generations of Americans.

HONOR THOSE WHO CAME BEFORE US - which means The American Legion pays perpetual respect for all past military sacrifices to ensure they are never forgotten by new generations.
The American Legion's motto is "Veterans Strengthening America."

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Preamble to the Constitution

Each of the 10 clauses of the Preamble, though brief, has a world of meaning.

Each participant should have a copy of the Preamble Interpretation in front of them. Ask for a volunteer to read the meaning of clause 1, 2, 3,4, etc. Take time to really understand the significance of the Preamble to the Constitution.



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For God and Country, we associate ourselves together for the following purposes...

This is the introduction. It declares that The American Legion recognizes the influence of Almighty God in all worthwhile endeavors-and declares the allegiance of Legionnaires to both God and Nation. First things have been put first. All that follows is in conformity.

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To uphold and defend the constitution of the United State of America...

The Constitution of the United States is the written bulwark of our free way of life and representative government. It is our guarantee of liberty, freedom, justice and democracy. Members of The American Legion bore arms went to wars-to defend and uphold this document of freedom.

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To maintain law and order...

Without law and order, liberty would become license. Law and order protect our pursuit of happiness, one of our God-given rights. Members of The American Legion served in wars to uphold law and order among nations. It is just as important to maintain the due processes of law in our domestic affairs. It binds Legionnaires to obey the laws of the land and to support the constituted authorities in enforcing those laws. It means the citizen must never take the law into his own hands!



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To foster and perpetuate a 100 percent Americanism

Americanism is the gist of the American ideals of freedom, justice, individual rights and unfenced-in opportunities. It embraces all the freedoms we cherish and all the rights that are guaranteed to us. It is the very opposite of hatred, bigotry and intolerance. Americanism is the creed that has blazed the world-wide trail for justice, fair play, decency, belief in God, private enterprise, universal education, and progress in all human endeavors. It puts a premium on the virtues of loyalty, patriotism, hard work and thrift.

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To preserve the memories and incidents of our associations in all wars...

Service in defense of America is the greatest experience in the lifetimes of all veterans. Recalling the highlights of that service means more than flashbacks to tense moments of excitement and danger in battle, the grime of muddy trenches, the perils of sub-infested oceans, the combats in the wild blue yonder. It means also the un-erasable recollection of the comradeship, the bravery of pals, the teamwork, the sacrifices, the miseries and hardships of military campaigns shared in common. It means the bond that binds all ex-servicemen and women together in mutual affection, respect and gratitude. It also means keeping green forever the memories of the supreme sacrifices of gallant American patriots, sacrifices necessary to the winnings of wars. It means faithful annual observance of Memorial Day and Veterans Day.

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To inculcate a sense a sense of individual obligation to the Community, State and Nation...

Always interested in building a better nation, the founders of The American Legion believed that such building must start first with the individual in his own community. So, they made it one of the cardinal principles of The



American legion to inculcate that sense of personal obligation to the community, state and nation into the individual citizen. That means educating the citizen-young, old and future-in his and her responsibility to be active in making the hometown a better place in which to live, in discharging the duty of voting in elections, in paying taxes promptly, in contributing to community chest funds and to blood banks. The word "inculcate" means "to impress by frequent admonitions" and "to enforce by frequent repetitions." Like the duties themselves, the reminders that they remain to be carried forward, are never finished.

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To combat the autocracy of both the classes and masses...

This clause places the Legionnaire on the side of right in opposing autocracy by either class or mass when this threatens. In a democracy such as ours, composed as it is of all nationalities, races, creeds and economic groups, there are bound to both classes and masses. Indeed, the masses are composed of classes-but all groups within the mass must feel assured that in this nation, reason and fairness will prevail in all human activities and relations. There must be no hyphenated Americans-just Americans all.

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To make right the master of might...

All wars from the veterans of which The American Legion draws its membership were started by dictators who wanted their might to be the right. If human freedom is not to perish from the earth, right must always be master of might. The rights of small nations must be protected against the tyranny that powerful neighbors may seek to impose on them just as the rights of minorities in our society must be protected and respected. Our belief in enthroning right over might is the main essence of our ideological conflict with Communism today. Legionnaires are pledged by this clause always to stand with the right, protect the weak and preserve the liberties of the individual. This concept is the basis of The American Legion's



continued advocacy of a strong national preparedness so as to achieve the ideal situation that right will be backed by adequate might.

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To promote peace and good will on earth...

Until all the world becomes a good neighborhood, Legionnaires must continue the effort to promote peace and good will on earth. It is in pursuance of this founding ideal that The American Legion has supported from the beginning and seek to strengthen the United Nations organization. Obliquely, The American Legion also contributes to this ideal by firmly supporting a strong national defense to discourage breaking of the peace by aggressor

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To safeguard and transmit to posterity the principles of justice, freedom and democracy...

On this ideal of safeguarding and transmitting to posterity the principles of justice, freedom and democracy, all of the youth-training programs of The American Legion are built upon. All Americans can be proud that in our international relations we have tried to live by the golden rule, the mark of justice. We have granted to others, as we prize it ourselves, the great boon of freedom. Through the Monroe Doctrine, we call a halt to foreign imperialism in the Western Hemisphere. We gave freedom to the Philippines. These principles are part of the American heritage. Legionnaires are pledged to protect and preserve that heritage.

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To consecrate and sanctify our comradeship by our devotion to mutual helpfulness...

The American Legion today as an unparalleled force in these United States for social betterment. American Legion concepts and its ideal of devotion to



mutual helpfulness warmed up the whole social climate of America. Today, America is extending its helpful hands all over the world through our assistance programs of foreign aid. It all came about because the veterans of World War I came home enriched with wonderful ties of friendship and gave those ties a meaning by consecrating them to the ideal of mutual helpfulness.

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Four Pillars of The American Legion

Each of these pillars encompasses a variety of programs that benefit our nation's veterans, its servicemembers, their families, the youth of America and ordinary citizens.

- **Veteran Affairs & Rehabilitation**
- **National Security**
- **Americanism**
- **Children & Youth**

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Veteran Affairs & Rehabilitation

Lobby for adequate funding of VA health care, timely access to facilities, fair rulings on benefit claims and economic opportunities for those who have come home change

Veterans Affairs & Rehabilitation:

VA Claims Backlog:

- Urging the VA and Congress to reduce the amount of time it takes to decide a veterans claim
- Introducing new technology to track medical records from service, discharge, and then on to the VA.
- Shifting the focus from quantity to quality when adjudicating claims. Yes, it may take longer individually but will reduce the backlog because the claim will only be handled once



Access to VA Care: While the VA has undergone a well documented evolution in the past 25 years, dramatically increasing its quality of care beyond that of the private and public sectors we still struggle to have access to high quality care such as:

- Priority Group 8 suspension due to budget; while we have opened this up to over 250,000 veterans, we still have veterans who eligible for VA Health Care.
- Care for female veterans – 49% of female veterans are pushed to seek comprehensive care outside the VA health-care system.

Long Waiting Times: Waiting times for primary care 30 days or more and even longer for specialty care

Construction:

- Many underserved areas are in need of VA facilities.
- The average VA facility is over 50 years old and was not built with the proper infrastructure to support today's health-care technology.

Adequate Staffing:

- Competitive Compensation

Contractor Dependence: VA increasingly relies on outside contractors who do not understand the unique needs of veterans consistently suffering from such conditions as combat-related post-traumatic stress disorder, traumatic brain injury, agent orange exposure and other service-connected disabilities.

Rural Health Care: Veterans in rural areas are often denied access by the sheer distance between their home and the VA medical centers equipped to serve them. Many plans have been piloted to enhance care for rural veterans, but significant improvement aside from recent mileage reimbursement increases has yet to be realized.

Better Funding Formula: The discretionary process of funding the Veterans Health Administration is flawed because it fails to match actual dollars with actual demand. VA must be funded based on real cost while not burdening veterans on fixed incomes. The American Legion supports:

- Sufficient, timely, and predictable funding
- Authorization of VA to collect Medicare reimbursements for services provided to enrolled Medicare-qualified, nonservice connected veterans.



- Full reinstatement of Priority Group 8 veterans and improved performance standards in collections from their insurance companies.
- Protection from doubling of prescription co-payments and/or the introduction of annual VA health care enrollment fees.

Support for Veterans with Special Needs: Homeless Veterans, TBI, Multiple Combat Injuries (Polytrauma), Agent Orange exposure, Gulf War Illness, Radiation exposure due to atomic testing, mustard gas exposure, and other medical problems linked, or presumably linked to military service. Specifically urging VA and Congress to fund and adequately staff more vet Centers which provide mental health and occupational outreach to thousands of veterans who otherwise look to the VA medical system for help or end up on the street.

Volunteering – in 2009 American Legion members volunteered over 916,598 hours of service to hospitalized veterans in their communities for a total cost saving of over \$18.4 million to the VA. Also serving Habitat for Humanity and Rebuilding together to ensure that veterans were able to live in quality housing. Built a suicide prevention and referral program to help connect a servicemember or veteran experiencing a mental-health crisis with VA's national Suicide Prevention Hotline.

Final Respects – The American Legion works closely with the National Cemetery Administration, Arlington National Cemetery, and other federal and state governments and entities to ensure a proper burial for all veterans, as well as honorable burial services for the veteran, the family of the veteran and other loved ones.

The Legion also serves as a major coordinator of the Missing in America Project which ensures that cremated remains of Veterans long forgotten in funeral homes, hospitals, and other establishments are respectfully laid to rest. The American Legion provides a large portion of volunteers for Missing in America Project.

Transition Assistance – The American Legion Economic Commission operates a number of programs, provides outreach and testifies before Congress in order to help veterans make the transition from military to civilian life. This important arm of service has a place upon the Veteran Affairs and Rehabilitation pillar but stands as an independent division of the organization. This division can be divided into three main parts: Jobs for veterans, business opportunities and education.



Homelessness: The American Legion works with the VA and numerous local posts and organizations to provide relief for veterans who have found themselves homeless. As veteran unemployment runs higher than that of the general population, so does veteran homelessness.

GI Bill Benefits: The American Legion has maintained a strong connection to the GI Bill since 1944 when Past National Commander Harry Colmery crafted it on stationary at the Mayflower Hotel in Washington. Since then, the GI bill - considered the most significant social legislation of the 20th century – has educated millions of Americans and gave birth to a half century of economic prosperity.

The Legion provides assistance for veterans trying to decide which of today's multiple GI Bill programs is the best fit for them as individuals and also lobbies Congress and works with VA to strengthen the benefits.

Employment, Business and Education: The American Legion actively participates in numerous outreach efforts for Veterans seeking employment or business opportunities after military service. The Legion aggressively lobbies for veterans-preference laws and compliance with laws designed to provide incentive for disable-veteran entrepreneurship.

- **The Legions Economic Commission** assists in job and career fairs throughout the country and works to protect the careers and benefits of reservists and National Guardsmen during military deployments.
- **The Legion's Business Task Force** is composed of Veteran entrepreneurs who give regular workshops and conferences to help veterans draft business plans, learn about their benefits and help them compete for government contracts.

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National Security

The American Legion closely monitors issues that are most relevant to our nation's vital security interests. The American Legion works closely with each branch of the US Armed Forces in an effort to stay well informed about issues that affect our troops strength and military quality of life a top priority.



Increase the size of the Armed Forces: The American Legion urges Congress to fully fund the armed forces, to reset units with new equipment and replacement parts, and to help provide training for specific skills required for critical mission performance across the full spectrum of conflict. The American Legion also urges an increase in military personnel end strengths to levels that reduce the frequency of deployments on servicemembers, the stress on families and the risk to national security that results from conventional warfare missions being relegated to a lower priority for training, planning and resourcing purposes.

Quality of Life for Servicemembers, Retirees and military families:

Quality disabled military retirees earned and deserve full concurrent receipt of their DoD retirement pay and VA disability compensation which come from separate budgets for separate purposes. Today most disabled military retirees are forced to choose one or the other in what has become now as the “disabled veterans’ tax”

Military health care programs must also be fully funded without additional enrollment fees or co-payment increases for beneficiaries.

Military personnel who sustain injuries or illness while on duty must be given fair and timely discharge processing and their transition to civilian life and/or VA health care made seamless and effective for rejoining civilian society and the work force.

The American Legion strongly supports a continuum of care for disabled veterans after the re-integrate.

Homeland Security: The American Legion works closely with government at all levels to improve disaster readiness in local communities and at the national level to ensure that a well-funded and efficient Department of Homeland Security (DHS) is prepared for any contingency.

The American Legion supports funding for the US Coast Guards “Deepwater” initiatives to rebuild its fleet and modernize assets.

Foreign Relations: The Foreign Relations Commission works closely with the Department of State to seek peaceful solutions to various world conflicts and to advance US foreign policy. The American Legion supports policies and legislation that enhance funding for the US Agency for International Development (USAID).

The American Legion encourages increased federal funding for foreign relations and international affairs and for the Department of State’s continuous efforts to seek peaceful and diplomatic solutions to world



conflicts as well as its initiative for the creation of the Civilian Response Corps for deployment before, during or after military campaigns.

Full Accounting of POW/MIAs: The Legion supports joint POW/MIA Accounting Command activities to locate and repatriate all recoverable remains of US military personnel who have died in captivity or are missing in action.

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Americanism

Americanism: Flag Protection, Illegal Immigration, Voter Registration and Participation, Boy Scouts, The Pledge of Allegiance, Establishment-Clause Lawsuits

As an organization dedicated to God and country, with a membership of military veterans that takes deep pride in the US flag and all it means, The American Legion has always been a stalwart champion of patriotism, morality and citizenship. Upon the pillar of Americanism is The American Legions devotion to law and order, the raising of wholesome youth, respectful observance of patriotic holidays and remembrances, education and law-abiding citizenship.

US Flag Protection: The American Legion joins all the states and an overwhelming majority of citizens in its position that the American flag deserves legal protection from acts of intentional public physical desecration.

Illegal Immigration: The American Legion supports manageable, legal immigration. The Legion adamantly opposes illegal immigration, amnesty for those who illegally enter the United States, and ineffective measures to prevent illegal border-crossing particularly during a time of war. The Legions strategy to combat illegal immigration call for strong border security, including physical barriers and high-tech surveillance methods; the elimination of social services benefits for illegal immigrants; employer sanction against those who knowingly hire illegal immigrants; and the enforcement of existing immigration laws.



The Legion also supports new laws that deny illegal immigrants drivers licenses, establishing perimeters for non-criminal deportation, and designates English as the official language of the US government. Providing assistance and instruction to immigrants following the legal path to US citizenship has been a long-standing and proud tradition upheld by The American Legion since its founding in 1919. Helping legal immigrants prepare for their naturalization test and assimilation into American society is in the best interest of our nation.

Voter Registration and Participation: Legion posts throughout the country offer their services and facilities to stimulate registration and turnout at polls. Post also provides facilities and opportunities for nonpartisan voter-education forums and debates. NOTE: Under the federal provisions of its federal charter, The American Legion is prohibited from supporting, opposing or providing aid to any political party or candidate for public office.

Boys Scouts of America: The American Legion vigorously opposes attempts to strip the Boy Scouts of public support, sponsorship and facility space due to the organization's membership or leadership criteria. The organization should not be punished or persecuted for acknowledging God in its oath or for setting leadership restrictions based on moral code that the majority of Americans endorse.

The Pledge of Allegiance: The American Legion affirms that pledging allegiance to the flag is voluntary offering of a patriotic oath to the nation, that no one should be denied this opportunity, and that the removal of these words will set a precedent that questions that propriety of numerous references to a supreme being in historical documents, on currency and on many of our government buildings, including the US Supreme Court.

Establishment-Clause Lawsuits: The American Legion is dedicated to combating the secular cleansing of our American heritage, performed by lawsuits that attack Boy Scouts, the public display of the Ten Commandments and other symbols of America's religious history.

The American Legion Legacy Run: The American Legion Scholarship was established to help young people whose parents have lost their lives serving in the armed forces in the years following 9/11.



Boys State: At Boys State high school juniors learn the rights, privileges and responsibilities of a franchised citizen.

American Legion Boys Nation: Boys Nation participants are selected from Boys State programs across the country. Each delegate represents his state as a senator. An intense week of training and education in the legislative process also includes tours of Washington monuments and memorials along with an occasional visit from the president.

Oratorical Program: Teaches appreciation of the US Constitution.

American Legion Baseball: Posts sponsor teams in all 50 states and Puerto Rico giving young men and women wholesome healthy activity and lessons on sportsmanship, loyalty, and respects for rules of fair play.

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Children & Youth

Children & Youth: Catastrophic Illness, Intellectual Disabilities, Immunization, Family Integrity, Media Violence, Drug Abuse, Child Sexual Exploitation

Main objectives are to strengthen the family unit, to support quality organizations that provide services for children and youth and to provide communities with well-rounded programs that meet the physical, educational, emotional and spiritual needs of the young people. The commission works to provide hope for children who face health, safety, discipline or home life challenges and provides opportunities for young people to succeed.

The American Legion Child Welfare Foundation provides more than \$500,000 in grants each year to nonprofit organizations that work to improve the lives of young people. These grants have aided organ-donor campaigns, supported efforts to help military children cope with deployment or the loss of a parent, and funded projects that increased public awareness of Huntington's disease, autism, Reye's syndrome, meningitis, spina bifida, diabetes, cancer and other conditions.



The commission on Children & Youth has focused recent attention on several important national programs including Children’s Miracle Program, Ronald McDonald House Charities, Special Olympics, youth-suicide, Halloween safety, the Family Support Network, Temporary Financial Assistance, Operation: Military Kids, and others.

The American Legion’s Children & Youth pillar includes positions on:

- Child Pornography
- Catastrophic Illness
- Intellectual Disabilities
- Immunization for Needy Children
- Family Integrity
- Media Violence
- Drug Abuse
- Child Sexual Exploitation

Family Support Network is ready to provide immediate assistance to US military personnel and their families whose lives have been directly affected by the war on terrorism.

The American Legion has a nationwide toll-free telephone number for servicemembers and their families to call for assistance. Requests can also be made online. All inquiries are referred to the Department in which the call originated. The Departments relay the collected information to a local American Legion Post. The Post then contacts the military servicemember or family to see how assistance can be provided.

Temporarily Financial Assistance helps military and veteran families with minor children at home. Through TFA, a local American Legion post can call upon the national organization for cash assistance to help meet the basic needs of veterans’ children.

The Samsung American Legion Scholarship – After researching dozens of veteran's organizations, Samsung choose The American Legion in 1995 to administer an endowed scholarship fund of \$5 million. This endowment was established to show appreciations to us veterans who came to the aid of Korea during its struggle against communist forces during the Korean War.

The scholarship is for undergraduate study only and may be used for tuition, books, fees and room and board. Seven to 10 students are chosen



each year for the \$20,000 scholarships which are awarded to direct descendants of US wartime veterans.

Child Welfare Foundation was established in 1954 to collect donations from individuals who wished to contribute to the betterment of children in this country that are faced with physical disabilities, parenting problems, and even homelessness.

Please note that there are additional scholarships available such as Baseball Scholarship, Oratorical Contest, Eagle Scout of the year, Shooting Sports Scholarship, Anavicus Scholarship, etc. Please go to legion.org/scholarships

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Protocol is...

What is protocol? Although “Protocol” is a term that is used primarily in the setting of etiquette that governs diplomatic functions, there is a certain amount of protocol applied to meeting and/or social functions. Below are some items of interest of when we have a National Officer visiting The Department of Florida.



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Why is protocol important?

Why is this critical? We are a professional organization and much of the importance is reiterated in our opening ceremonies. We all must regularly review this information together and refer back to the Officers Guide to remind us why we are present and performing these important tasks.

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Ceremonies

Much of the information provided in the Manual of Ceremonies has its roots in long-time tradition and usage. The practices adopted by The American Legion may not be the same as those used by other groups or organizations, but it does not mean the Legion is right and others are wrong.

- The ceremonial services of The American Legion must be conducted with the dignity of this organization.
- No one shall be admitted during opening, initiation or the closing ceremonies of a meeting.
- A member entering the hall after the meeting has begun shall advance to the center of the room, salute the colors and be seated.
- Any member desiring to be excused from the hall while the meeting is in progress except during a prayer, the obligation or period of silence shall advance to the center of the room, salute the colors and leave.
- The national colors and post flag, when in position, should be in position at either side and just in advance of the commander's station.
- Each officer shall be equipped with the official cap and with the proper official badge of the respective office. Many posts follow the tradition of not "breaking the colors, which mean walking between the colors and the commander. If that is your post's tradition, follow it. But make sure you periodically brief new members—don't just yell at members if they break the colors

Refer to the Officers Guide & Manual of Ceremonies pages 40 - 80 for instructions on how to conduct any official ceremony.



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Hallowed Ground

The person needs to approach the American Flag stop and render a salute if properly covered, or hand over heart if not properly covered, then proceed around the left side of the flag and behind the speaker. When business is complete, the person will walk around to the left of the speaker and once clearing the post flag, stop and render a salute if properly covered or hand over heart if not.

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Passing of the Flag

During the ceremony of hoisting or lowering the flag or when the flag is passing in a parade or in review, those present in uniform should render the military salute.

Members of the Armed Forces and veterans who are present but not in uniform may render the military salute. All other person's present should face the flag and stand at attention with their right hand over the heart, or if applicable, remove their headdress with their right hand and hold it at the left shoulder, the hand being over the heart. Citizens of other countries should stand at attention. All such conduct toward the flag in a moving column should be rendered at the moment the flag passes.

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National Anthem

U.S. Code Title 36, Subtitle I, Part A, Section 301

- Designation. The composition consisting of the words and music known as the Star-Spangled Banner is the national anthem.
- Conduct During Playing. During a rendition of the national anthem
- when the flag is displayed
- individuals in uniform should give the military salute at the first note of the anthem and maintain that position until the last note.



(B) members of the Armed Forces and veterans who are present but not in uniform may render the military salute in the manner provided for individuals in uniform; and

(C) all other person's present should face the flag and stand at attention with their right hand over the heart, and men not in uniform, if applicable, should remove their headdress with their right hand and hold it at the left shoulder, the hand being over the heart; and

(2) when the flag is not displayed, all present should face toward the music and act in the same manner they would if the flag were displayed.

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Order of Introductions

Are generally done in order of rank within the organization, from low to high

NOTE: If NEC or NECA are present, these officers should be introduced just prior to the Department Commander

Master of Ceremonies generally will do the introductions unless preplanned otherwise.

Department Commander will make a speech of introduction for the National Commander if he is present during his official visitation unless preplanned otherwise.

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Order of Introductions: Head Table

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Presentations of Gifts



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American Legion Cap

The Legion cap, uniform or regalia should be worn by its members only when in attendance at official Legion meetings or ceremonies, as official guests at patriotic or other civil functions, or by individuals when officially representing The American Legion on public occasions. For all ceremonies, the uniforms adopted by a Department are recommended.

A Legionnaire is considered to be in uniform if wearing an official American Legion cap.

A Legionnaire wearing a cap should behave in proper accordance as to salutes. If not wearing a cap, observe ordinary rules of etiquette for civilian dress. Female Legionnaires will be covered later in the presentation.

Legionnaires wishing to attach decorations and/or other official insignia to their caps are advised of the following resolutions on the subject.

NEC Resolution #58-April 30–May 1, 1964

NEC Resolution #46-May 5-6, 1965

NEC Resolution #19-October 15-16, 1997

Please note that when Caps are not in a case they must be laid flat with emblem side facing up.

Caps are stored properly when in a case.

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When to Wear the Cap

In meetings, the cap should be worn except during the prayer, POW/MIA ceremony, Pledge of Allegiance, and while standing in silent reverence in memory of departed individuals. It should be held with the right hand over the heart.

REMEMBER–Wear the cap whenever you are representing the Legion **BUT** whenever you wear the cap you **ARE** representing the Legion.



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When to NOT Wear the Cap

The cap should be worn in a place of worship only by the guard of honor, color guard and commander of the same while in marching order or standing guard. When one is seated, the cap should be removed. Posts marching in formation into a place of worship should uncover at the door, hold the cap with the right hand over the heart until arriving in the pews and commanded to take seats, and remain uncovered during the entire service. At the close of the service, upon command, the post shall rise, hold the cap with righthand over the hearts, march out of the place of worship, and recover after marching through the door.

Hold the cap over your heart during the pledge and prayer.

At the graveside, your cap should be held over your heart during the entire service.

Do NOT wear the cap to partisan political events. Wearing the cap indicates you are representing the Legion.

Caps should be worn at the very beginning of the meeting, then removed during the opening prayer, POW/MIA Ceremony, concluding with the Pledge of Allegiance. Recover throughout the rest of the meeting until the closing prayer but recover as we render a slow salute during the retrieval of the POW/MIA flag.

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Caps and Female Legionnaires

Female Legionnaires should wear their caps in the manner prescribed for women in the armed forces. This is suitable for most situations, but taste and common sense should prevail. By American Legion tradition, a female Legionnaire may leave her cap on during the Pledge of Allegiance, the national anthem, prayer and meals.



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Our Role as American Legion Leaders

Our role as Legion leaders is to set the standard and realize that others are looking to us for guidance and examples. We must at all times look like leaders We must at all times act like leaders. Pride and passion will help us accomplish that

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How to Run an Effective Meeting

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Preparing for a Meeting

Let's face it, The American Legion is a volunteer ran organization and many of us are involved in other organizations. A friendly reminder goes a long way.

Preparation and execution of an agenda are equally important to a meetings success.



Please try to get the agenda out to the members a week out from the scheduled meeting.

Make sure that your Chairman get the agenda for the upcoming meeting and are aware of what you would like them to report on. A phone call prior to the meeting is always nice as well, to ensure they got your message.

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Set Up Meeting Room

Plan of a Post Meeting Room / Plan of Post Meeting Room for Special Ceremonies can be found on Page 36 – 37 of 2022 Officers Guide & Manual of Ceremonies on Legion.org / Internal Affairs Tab

Set up is generally done by the Sgt-At-Arms & must be setup prior to the meeting.

This arrangement is practical for regular post meetings. Always include the 'empty chair for POW/MIA portion of your meeting.

The room should be comfortable for all attendees with enough seating available.

Sergeant-at-Arms should ensure there is a table at the entrance to the meeting room with a sign-in log.

Every Post / District should adjust their setup to meet their particular needs and/or physical limitations.

Ensure that you have a sign in sheet

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Parliamentary Procedures

Officers Guide & Manual of Ceremonies Page 99-105

PARLIAMENTARY PROCEDURE is the application of parliamentary law to the conduct of an organization. It is wise for all leaders to familiarize



themselves with the technique of conducting a meeting. While it is important that the members understand the fundamental rules of parliamentary procedure, this knowledge should be used only to ensure order, to expedite business, and to develop an organization that will cleave to the objects for which it was organized. A simple set of rules can help keep the meeting orderly and allow all members the opportunity to be heard. A knowledge of the basic rules can help the Commander keep the meeting focused on its business and goals. Know what you want to cover and the business that is on the top of the priority list for the Post.

Motions – A member stands and is recognized by the chair and makes a motion, the motion is 2nd the chair states the question “It is moved and seconded that...”and the motion goes into discussion. Once discussion is complete move the question all in favor, those opposed, the chair announces the result of the vote.

There are several types of motions such as main, subsidiary, privileged, incidental or motions that bring a question again before the assembly.

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Motions

Motions – A member stands and is recognized by the chair and then make a motion, once the motion is 2nd the chair states the question “It is moved and seconded that...”and the motion goes into discussion. Once discussion is complete move the question all in favor, those opposed, the chair announces the result of the vote.

There are several types of motions such as main, subsidiary, privileged, incidental or motions that bring a question again before the assembly.

Obtain the Floor: The member rises and addresses the presiding officer as Mr. or Madame Commander, as the case may be, and gives own name unless known by the commander. If the member is entitled to the floor, the chair repeats the name of the member. This recognition gives the member the right to speak

Make the Motion: The member then states the motion or offers a resolution; for example, “I move that we take action to secure a playground for this community.” In order to state a motion properly, members of the



organization should become accustomed to using the words “I move that” when introducing a motion.

Second the Motion: If anyone wishes the matter discussed and voted upon, a member says, “I second the motion,” without rising or addressing the Chair. If no member seconds it, immediately the chair, except in small assemblies, repeats the motion and asks, “Is the motion seconded?” In small assemblies, where every member has evidently heard the motion, instead of repeating the motion, the chair may say, “You have heard the motion; is it seconded?” If the motion is not then seconded, the chair may say, “There being no second, the motion is not before the assembly.” Note: Consult your parliamentary authority for the motions that do not require a second.

State the Motion: After the motion is seconded, the Chair then states the motion; for example, “It has been moved and seconded that we take action to secure a playground for this community.” As this motion is debatable and amendable, the Chair should then immediately ask, “Are you ready for the question?” or “Is there any discussion?” If the motion is not debatable or amendable (consult your parliamentary authority on this point if in doubt), the Chair should then immediately put the question to vote.

Discussion: After a motion has been stated by the chair, it is before the assembly for consideration and discussion. Speakers to the motion must (1) be entitled to the floor, (2) address their remarks to the presiding officer, (3) be courteous in their language and Department and avoid all personalities. Speakers must observe the rules of the organization as to the number of minutes and number of times they may speak on a question. The maker of a motion may vote against, but not speak against, the motion. Discussion must relate to the immediately pending question. Note: Consult your parliamentary authority for the few exceptions by which a speaker may be interrupted after having been assigned the floor, and for the rules to guide the Chair when more than one person arises at the same time.

Put the Question: After sufficient opportunity has been given the debate, the Chair repeats the motion and says, “Are you ready for the question?” After waiting a moment, if no one claims the floor, the Chair then says, “All those in favor of the motion as stated, say aye. All opposed, say no.”



Announce the Vote: The chair says, “The ayes have it, and the motion is adopted,” or “The noes have it, and the motion is lost,” as the case may be. In the event of a tie, the motion is lost unless the Chair votes in the affirmative in order to carry the motion. A tie loses because every question must be carried by at least a majority. If in doubt as to the result, the Chair calls for a rising vote, first for, and then against, the motion, asks the adjutant to count the votes, and then announces the results.

Motion to Reconsider: A Motion that has been carried, lost or postpones indefinitely can't be considered again during the same session except by a motion to reconsider the vote disposing of the question, or to rescind the action taken. The motion to reconsider must be made only by the one who voted on the prevailing side. The motion to reconsider must be made on the same day or the calendar day after the vote which is to be reconsidered was taken. Any member can second this motion. The motion to reconsider, if carried, annuls the vote already taken and bring the motion before the assembly again for action.

Rescinding a Motion: Can be made if the motion to reconsider is not already pending. The motion to rescind can be made by any member. Its purpose is to undo some action already taken and is identical with a motion to amend by striking out something previously adopted, such as a by-law, resolution, section or paragraph.

In case of doubts as to parliamentary procedure, or if difficult questions arise, such as to lay on the table to postpone, to limit debate, to reconsider, point of order, etc., consult the parliamentary authority.

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Amendments

Slide 50

Nominations

If the By-Laws do not prescribe the method for nominations, then the assembly can discuss and entertain a motion to select the method of



nominating. This motion is not debatable per 2023 Officers Guide page 103.

Slide 51

Nominations by Committee

The usual methods are election by the assembly, or election by the executive committee or part by the assembly and part by the executive committee.

The Commander should not appoint the nominating committee nor be a member of it.

The nomination committee should consider the qualifications of each candidate for office and should secure the consent of the candidate before placing the name on the ticket.

Slide 52

Closing Nominations

If for any reason it is desired to reopen nominations, it may be done so by a majority vote (unless the by-laws limit the time for nominations).

Slide 53

Elections

Ballots should be given to only voting members whose membership has been verified and authenticated by showing their current Legion membership card. The identity of the voter must not be indicated in any way, as a ballot is a secret vote. If printed ballots are used, the names from the floor and those proposed by the nominating committee must be printed on the official ballot. Printed ballots cannot be used if nominations and elections take place at the same meeting. Instructions may be given to the assembly concerning the method of marking the ballot.



An unmarked (blank) ballot is just a scrap of paper and is not counted in elections.

The election committee has no authority to make any changes in the election ballot or mark it in any way.

The vote cast for each office must be preserved in such manner that if the election is questioned, the votes may be verified by a recount. If printed ballots are used, the election committee places the voted ballots in a sealed packet together with its report (signed by at least a majority of the election committee), and delivers the packet, sealed, to the adjutant. This sealed packet shall not be opened except by order of the assembly or the board for the purpose of verifying the vote or destroying the packet.

If slips of paper are used for voting for each separate office, the votes cast for each office must be sealed in a separate packet and delivered to the adjutant in like manner.

The form of the report of the elections committee for each office to be filled is as follows (example): “For commander—Number of votes cast—30; necessary for election—16; Brown received—19; Jones received—10; Green received—1.” After the vote for all the offices has been read (the largest vote for each office stated first), the names of the committee members signing the report are read, the report is handed to the commander, and the reporting member sits. The commander announces who is elected.

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Conduct During the Meeting

UNIFORM OF THE DAY

A Legionnaire is considered in uniform when wearing the official American Legion Cap. That is your blue “cover, or garrison cap”.

Leadership should wear an appropriate color name tag with their name, title, and post during the meeting and official Legion events.



ENTRY IF YOU ARE LATE

You should not enter, and the Sgt at Arms should not allow entry, during the initiation of or close of any meeting. If you are late and enter once the meeting has begun, you should enter the room, salute the colors and quietly take your seat.

CELL PHONE ETIQUETTE

Remind the membership to turn off or silence their phones during the meetings and please remember to do the same to your phone.

QUESTIONS AND COMMENTS

Members with questions comments and concerns should rise, be recognized by the chair and always address chair with those questions, comments and concerns

- Always be courteous to the chair and your comrades

Slide 55

Opening Ceremonies

Remind all in attendance to silence or turn off their phones.

The Opening Ceremonies should always be done in this order (Possible deviations for education or training)

No One should enter the meeting until after the Opening Ceremonies have concluded.

Slide 56

Order of Business

Please note that NOT ALL Posts/Districts/Counties have the same order of business; however, they should have a prescribed order.

Before starting the meeting if you are recording the minutes for the sake of preparing minutes make sure your adjutant upon starting roll call minutes/correspondence announces that the meeting is being recorded.



Roll Call is sometimes called for prior to the reading of minutes or the introduction of guests, but often it is found better to do this just before commencement of the business of the meeting.

Minutes – Once approved they are the official record of what happened at the meeting. They do not always have to be read, usually the secretary will distribute them prior to the meeting so the chair then might say, "The minutes of the previous meeting have been distributed, are there any corrections to the minutes."

In district meetings, it is always well to introduce past district commanders and never overlook past Department commanders or National Executive Committeemen. When making introductions, do not ask those introduced for remarks at that time. Later, it may be in order to hear from certain distinguished guests

If Department officers are present, they should be given special recognition and the opportunity to extend greetings. This should be done by the district commander, who will invite such officers to take their place for their remarks.

If the Department commander is present, he/ she should be introduced with respect and dignity and given the floor for such period as may be desired.

Auditing procedures can be found in the Constitution & By-Laws

Chairperson Reports - Persons making reports should be called upon by their name, post number and title of the office for which they are reporting and then requested to come to the front and address the meeting. If the district commander knows an official or committee chair has no report, then it is better to not call upon that person.

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Order of Business (2)

If chairpersons / post commanders are to report to the meeting it is important they are informed in advance of expectations to report and an outline provided on what the report is expected to cover.

Post Commanders / District Commander Report: Commanders should by all means have a personal report to make, and time should be spent in its preparation so the program may be properly presented. It would be well to give special recognition to posts or officers doing an outstanding job, as an encouragement to them and a stimulation to others



Announcements: No meeting should ever be concluded without announcement of coming events, such as Department conferences, special programs or forthcoming observances. At all such meetings, reminders of membership deadlines and active programs should be announced.

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Closing the Meeting

District Commanders should never close the meeting without an expression of appreciation to those who have attended, for their interest and support of the conference, and to the host post for its hospitality

Slide 59

The Chair's Role

The goal is to conduct the required business in the most effective time frame; NOT “get done as fast as possible”

Slide 60

Questions

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Post Officers Duties & Responsibilities

If chairpersons / post commanders are to report to the meeting it is important they are informed in advance of expectations to report and an outline provided on what the report is expected to cover.

Post Commanders / District Commander Report: Commanders should by all means have a personal report to make, and time should be spent in its preparation so the program may be properly presented. It would be well



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Announcements: No meeting should ever be concluded without announcement of coming events, such as Department conferences, special programs or forthcoming observances. At all such meetings, reminders of membership deadlines and active programs should be announced.

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Post Commander

Slide 63

Overview

We will focus on these areas listed on the slide. We certainly cannot go into depth in each of these areas, but we will cover those things you should know and learn to make sure your term as Commander is a success.

This course is designed NOT on surviving your term as a Post Commander, but to establish a foundation for an effective and successful term in the position. A successful Post Commander is focused on being a leader, not a caretaker, of the Post.

Leaders look to the future, work on continuous improvement of post operations and program management and take pride in moving the Post forward. Caretakers merely try to survive from one year to the next. We will discuss some of the tools and publications that can be extremely helpful to you—and in the process make you look knowledgeable and confident in front of your membership.

Successful post commanders are proud of what they have done and are more likely to be more enthusiastic and motivated to contribute to the Legion at a higher level of the organization.

Successful post commanders generally become knowledgeable and successful District Commanders, who in turn often contribute at position at Department level or even higher. We need solid leaders at all levels of the



Legion, and we increase our chances of having these leaders by preparing them early for success.

The Legion was created with the local Post as its foundation. Over the years posts have developed many of their own traditions and programs in the community. It is a fact that no two posts are alike, and we have over 12,600 posts in The American Legion. They range in size from less than 20 to over 6,000. Over half of them have their own facilities, others lease or borrow space. Some are rather wealthy—others have few tangible assets. Over the years posts were formed in companies, police units, and religious groups. We have police posts, firemen posts, women posts, university posts, and even union posts. They all have their own histories, traditions, and personalities. One size does not fit all.

Question: What is unique or different about your post that you have noticed?

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Post Commander's Charge

Slide 65

To be a Successful Commander

Slide 66

What do I do First?

Minutes: Review the minutes of past meetings to find out what “officially” has been happening at the post, and to determine if there are action items still open. Review finance reports for the past year. If the post has a written budget, review and understand it. Introduce yourself to your District Commanders if you do not already know them. They are in those positions to help you – take advantage of them.

Review Previous Consolidated Post Reports. The Annual Consolidated Report documents the many activities and accomplishments of your Post. Combined with the reports of Posts throughout the nation, it tells the Legion



story for the year. It is recommended that you keep a monthly log of what the Post does and enter it online at www.mylegion.org. Do not wait until the last minute to do the report. There is a 3-part paper version to submit, if you so choose, but we recommend using the online version since you can update it as needed any time prior to submitting it to your Department by June 1 each year. Unfortunately, only about 65% of the Posts in the nations submit this report, and some of them are negative reports with no information. That means we only report about 60% of what we do to Congress and other national agencies. Do your part and make sure the Post tells its story and reports it by June 1.

Post Constitution & Bylaws: The main operating policies of the post should be specified in the post's constitution and by-laws, so you need to find them and read them. If you cannot find them, contact the Department Adjutant, because they should have been sent to headquarters in the past to be put in a file. Your constitution and by-laws must follow those of the Department, which follow those of the National organization. The constitution and by-laws should include, but are not limited to:

1. Post organization and required officers
2. Election of officers
3. How elections are run and who runs them
4. Programs and program management
5. Facility operations and rules
6. Committees
7. Executive committee operating policies

You also need to seriously assess yourself and determine your confidence and skill levels for assuming your new role. You chose to be here in this course, so that says a lot about your motivation to do a great job. How much do you know about your post, its history, and its members? Which members can you rely on to be honest and helpful advisors to you? How well do you understand the values and purposes of the American Legion as a national organization? This is important to know, because the actions of your post must live up to the values and purposes of the Legion.

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Assess the Situation

Assess the situation:



Before diving into all the things, you want to accomplish as Post Commander, take a little time to assess the situation in and around the post—in other words, what is the overall health of your post? What programs and activities does the post do, how well are they managed, and are they relevant to the membership and the community? You can use the Post Responsibility Audit checklist in the Officers Guide as a sample of some of the items you should consider in assessing the health of the post. What is the post's reputation in the community?

Your Post home should be a place that exhibits Legion values and be that defined home that the community recognizes. It must create a positive image of the Legion and the Legion's contributions to the community. The American Legion was created with the local Post and Community as its foundation. Public relations is vital at all levels of the American Legion. **Ask: *What is the image of The American Legion in your community & Why is it that way?***

The vast majority of communities only interact with the local Post. In their eyes, the Post IS the American Legion. IMAGE IS EVERYTHING

There are a number of ways to find out what the community thinks of the Legion and your Post. Make it a point to talk with local leaders and business owners, school leaders, and community members. Ask them how the post can better support the community and its members. Their inputs can not only help you improve the Post and its activities, but possibly help the Post re-engage with schools, community groups, and citizens in more meaningful ways.

Most posts do not do a good job keeping the community apprised of all the good things they do and how they contribute to the community. They often just assume that people know. Be prepared to tell everyone what the Post does, what it hopes to do in the future, and how it wants to be responsive to community needs. Make sure you DO great things in the community. Make sure you PUBLICIZE and COMMUNICATE these things to the community ****ASK: Why are Post Activities and Membership combined in this section?** DISCUSS Bottom line: Posts with meaningful activities have an easier time attracting new members and retaining current members

As a Commander, you should encourage your post to be positive about membership, and have a consistent goal of growth, even if it is small or modest growth. Your influence in the local community also relates to the size (and the activity) of your post



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Self-Assessment

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Essential Tools

All pertinent documents can be found on floridalegion.org/resources

Essential Tools:

The Legion has many manuals, guides, and informational pamphlets. Everything the Legion publishes is available for viewing and download on the national website at legion.org. If you scroll to the bottom of the home page and click on Publications. In this course we will talk about those tools most important to a new commander.

The Officer's Guide is your most useful tool. It is published annually, and each Post should receive one in the bag the post receives after the annual Department Convention. The Officers Guide and Manual of Ceremonies is your guide to having a post home that meets Legion standards and provides a place to integrate Legion activities with community activities. The Officers Guide should be the first place you go when you have a question about Legion policies or procedures. There are examples for every type of ceremony you could think of, from suggested scripts to how to set up your meeting room.

The Administrative Manual is a monthly guide to programs, awards, and reporting requirements. Each month it tells you those things you should do to meet all the tracking and reporting requirements. While some of the items may not apply to your post, it is a vital tool for all post commanders.

The Adjutant's Guide covers the role and duties of the Adjutant, the person you will work most closely with. Know what should be expected of the Adjutant.

The District Commanders Guide is a national publication focusing on helping Legionnaires succeed at leadership jobs above post level.



Roberts Rule of Order Current Edition: Previous Minutes, Financial Reports, Post Consolidated Reports

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Post Commanders Role

ASK: What do you believe the Commander's role should be in the local Post? What are some of the factors that help determine what the proper role should be? Topics to discuss could include post finances, post attitudes, membership trends, community issues and problems, personality clashes, etc.

ASK: Think about your ideal Post Commander, based on your Legion and life experiences. What kind of person would he or she be? What talents, skills, and personality traits would you like to see in this person?

ASK: Is there an ideal length of time for a person to be a Post Commander? What factors affect your thinking on this ideal time?

** What is different about leading Legionnaires? Does it really take good leadership to be a Post Commander?

It is proven through many studies that organizations take on the values and attitudes of their leaders. In the military, this is even more true since commanders change frequently and have different styles and personalities.

Commanders Role:

The Commander's role is to facilitate an orderly meeting, which requires him or her to take charge and remain in control of the proceedings. Keep the discussions on track and allow every to speak without allowing anyone to take over the discussion. Stick to the agenda and keep any new of off-topics for the final item of the night, For the Good of the Legion.

Remember, your task is to accomplish the necessary business in the most effective way, not to finish the meeting as fast as possible. Have an good understanding of the basic Roberts Rules and be confident.

These are factors that generally pop up when describing an effective organization leader, such as a post commander. Which of these roles to you feel you are capable of filling? I bet that you already have the capacity to fill the first 5 roles. This course, and other training offered by the Legion, will help you build the knowledge role.



Leadership
Positive Attitude
Energy
Enthusiasm
Passion
Knowledge

Remember that in leadership, ATTITUDE TRUMPS APTITUDE. We can teach skills and knowledge, but the intangibles of attitude, enthusiasm, energy, and passion are very personal traits that depends on the individual's desire to serve and lead.

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Take Care of the People

Take Care of the People:

In the military, we all probably agree that a good commander takes care of his or her people. The same holds true for a Post Commander. One of your most important roles is to recognize those members, and volunteers, who do good things for the Post. Everyone appreciates being recognized for their good work. Sometimes a public “pat on the back” is sufficient and is enough to keep that person motivated to keep giving time and energy to Post activities.

The Commander has some other more tangible tools and awards available. There are many different awards available at District and Department level to recognize your members. All these awards are listed in the Department Adjutant's Administrative Manual, as well as the dates they must be submitted and the forms you should use to submit the people. Often there are few, if any, Legionnaires submitted for these state-level awards. Successful Post Commanders make sure they take advantage of these award opportunities. The very fact that you submitted a member for a higher award is recognition for their good work. Winning the award is icing on the cake.

There are other awards for recognizing the Post itself. Perhaps the most meaningful is the Post Excellence Award. For this award, the post must achieve membership of at least one more than the previous year and list some Post activities that fall under the Four Pillars.



Billy Award:

American Legion Family:

If your Post has a Sons of the American Legion Squadron, take advantage of the assistance they can provide to making your Post a better place. Veterans not eligible for the Legion may very well be eligible to join the Sons. The Sons are a program of the Legion and can be integrated into almost all Legion activities. They are, in essence, a force multiplier for you. If you do not have an SAL Squadron, consider creating one. Almost all successful Posts also have an active and strong Auxiliary Unit. The American Legion Auxiliary is a separately chartered organization created to support the American Legion in its missions. Your Auxiliary Unit can help energize your Legion membership. Treat them as a partner, and work together. The American Legion Riders is also a program of the American Legion.

It is critical that the Post Commander always displays a positive attitude about membership issues and activities. Show you are proud to be a Legionnaire and care about the future of our organization. Try new things—never give up or get frustrated.

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Reality

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Questions

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Post Adjutant



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Overview

Becoming a Post Adjutant can sometimes be a challenging task for a variety of reasons.

We will focus on these areas listed on the slide. We certainly cannot go into depth in each of these areas, but we will cover those things you should know and learn to make sure your term as Adjutant is a success.

Course Objectives:

Understand the importance of reports/reporting.

Understand the information available in manuals and other important tools.

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Post Adjutant Charge

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The Ideal Adjutant

What are some of the traits or attributes that the ideal adjutant should possess?

Honesty and willingness are a great starting point for a new post adjutant.

Organization, great note taking skills, good listener, ...

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Post Adjutant Tools

Past records include constitution and by-laws, minutes of meeting, reports of officers and committees



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Post Adjutants Manual

Same position in the Post as the secretary of an organization and a bit more

All post activities revolve around the Adjutant

Good adjutants stay for many years. This helps to provide continuity when other officers rotate offices.

Commander navigates the ship, but the adjutant is the engineer who runs the ship's machinery and keeps the vessel on an even keel.

Point of contact for individual members of the post

Documents can be retained electronically; however, paper records should also be retained.

- Retain documents in a way that is useful to everyone
- Written
- Digital
- Posted on website

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Post Charters

- Naming a post
 - Individual must be deceased, and the post must have the family's written permission to use the name. Appropriate documentation must accompany the request.
 - A copy of the meeting minutes approving the Name Change must be sent to Department. Department will then get approval from the DEC. Following approval, the Department will then request the name change through National.



- A Legion name change will result in the SAL name change and new charter issued.
- Location change
 - A letter including a copy of the minutes or resolution must accompany the request to move locations must be sent to Department. They will then forward the request to National Headquarters.
- Temporary and permanent charters
 - Any group of veterans may apply for a post charter from the national organization through Department Headquarters after meeting all Department requirements. What is the minimum number of members to start a new post? **(15) New members**
 - Temporary charter is used for new posts
 - After 90 days, the post can apply for a permanent charter
 - Department can assist with the forms
- Supplemental charters
 - When a post becomes incorporated, it is necessary to apply for a supplemental charter. When a post becomes incorporated and changes its name, the change is enough for it to be considered by the government as a new entity, thereby requiring an EIN.
 - The incorporation of a post modifies the information sent in on the earlier inclusion letter reporting the post name to the national organization.
 - A Change in the name even just adding “Inc” will be reported to the IRS.
- Tax-exempt status
 - The American Legion is tax-exempt under Section 501(c)(19)
 - Required to fill out an annual tax information return (Form 990)
 - If it has a bank account, it must have an employer identification number (EIN)
- Incorporation
 - It is recommended that posts incorporate in the state in which they are located. This helps protect their members from liability and generally makes the holding of real estate a much easier matter.



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

Incorporation Papers – filed with the state, copy sent to Department Headquarters. Must be done annually to maintain “Active” status. Must be filed online between January 1st and May 1st to avoid a \$400 late fee. To file go to www.sunbiz.org. It is advisable to file after elections so that you do not have to pay a fee to update sunbiz.org otherwise Post must file an amended report which costs additional monies.

Annual 990 Filing Requirement – filed by the IRS
Forms 990, 990-EZ, and 990-N must be filed by the 15th day of the fifth month after the end of the Post’s annual accounting period. A Post that fails to file the required informational return for three consecutive years results in revocation of tax-exempt status as of the filing due date for the third return.

Tax Exempt – filed with the state, certificate to Department headquarters
Application for Consumers Certificate of Exemption form (DR-5) must be filed with Florida Department of Revenue to receive tax exempt purchases and leases, when used in carrying on Post activities.

Employer Identification Number (EIN)
All newly chartered posts receive a SS-4 form in their new Post kit, prepared and sent by national. The instructions should be closely followed in completing and submitting IRS form SS-4. When you receive the Post EIN, send a copy of the number and the Inclusion letter to national headquarters so the post may be listed as a tax-exempt charter of The American Legion. A listing of all new posts, plus updates are sent to the IRS each September 30th.

Post Constitution and By-Laws – updated every three years
Post must forward an original copy of the entire Constitution and By-Laws with a cover letter signed by the Post Commander/Post Adjutant to Department Headquarters. The letter must state the changed article(s) section(s), and date approved by membership.



Post Insurance – Please make sure that the Post Insurance Policy is up to date and has adequate coverage for all posts property i.e. tables, chairs, stools, kitchen equipment, office equipment etc. You never know when a disaster will happen.

Check your local ordinances to ensure that you have the proper licenses if you serve alcoholic beverages.

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Post Officer Certification

If this is not completed, vital information may go to officers who are no longer in office, have moved or are in Post Everlasting

Although elections have been completed the only way that National knows is to get the Officer Certification form submitted to the Department. It is recommended that at a minimum, the DD-214 for the Adjutant and Commander also be included when the form is submitted.

Suggestion is to have all officers bring a copy of their DD-214 the day of elections so that the Post Officer Certification can be completed the day of elections and sent to Department Headquarters.

Notification of a Post Commander / Adjutant Change must be completed and submitted to Department if something was to happen during the year where an individual is not able to full fill their term. This is vital to ensure that the Posts day to day operations continue.

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Post Program Chair Form



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Annual Post Data Report

Why is this important? Throughout the year national staff will reach out to posts in regard to membership renewals, awards, Dispatch subscriptions, veteran issues and other important issues. This information needs to be current.

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Consolidated Posts Reports

Please make sure that you start collecting data on a monthly basis to ensure that you are able to capture everything that your Post has done throughout the year.

Submitted reports are included in a final report presented to Congress each year by the National Commander as justification for The American Legion's non-profit status and to elaborate on what the organization does in local communities.

Updates can be made throughout the year and saved on mylegion.org. When the report is complete hit submit and print a copy for the Post records.

If a project, activity, or event cannot be adequately covered on the report form, attach a written description with pictures and articles and send it to national and Department. The narrative report will be reviewed by personnel at National HQ responsible for specific programs and shared with the staff of The American Legion Magazine.



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Meeting Minutes

Ensure the post Bylaws indicate how long the meeting minutes are to be held. It is recommended they are held in written form for five years or more.

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Motions & Discussions

Document any activities agreed on at the meeting. Meeting minutes can (and are) be used in litigation cases if needed.

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Prior to voting the Adjutant Should...

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Meeting Minutes Should Include:

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Meeting Minutes Should Include Continued

Record of proposals, resolutions, motions, seconding, any final disposition, and a summary of the discussion; also a record of vote.

Remember, minutes are very important. They are saved and might be referred to for years and years to come. Someone's reputation and good name may depend on it. The reputation of your Post may depend on them.



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Approving Minutes:

Prior to the meeting the adjutant can either send electronically the drafted minutes to membership prior to meeting, read the minutes aloud to members at next meeting, or distribute a hard copy of the draft of the minutes.

According to Robert's Rules for Approving Minutes, The most efficient way of approving minutes is for the adjutant to assume the motion and obtain unanimous consent that the minutes be approved as distributed (or as corrected).

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Reality

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Questions

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Post Vice Commanders

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1 Vice Commander's Charge

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1 Vice Commander Role

Refer to your Post Constitution and Bylaws for your specific job description.



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2 Vice Commander's Charge

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nd

2 Vice Commander Role

Refer to your Post Constitution and Bylaws for your specific job description.

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Questions

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Post Sgt at Arms

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Post Sgt at Arm's Charge

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Duties & Responsibilities

Sergeant-at-Arms should oversee the color detail during the presentation and retirement ceremonies of the colors.

Each Post should have a welcome committee. The sergeant-at-Arms is the logical person to chair such committee. The members of this committee must welcome new members and guests, make sure they are introduced, and keep the Post Commander advised as to who should be acknowledged in the proper protocol order.



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Duties & Responsibilities Continued

Always dress appropriately. Lead by example.

Set-up items you may need to be aware of: Microphone; set up and tested a head of time, how the flags will be setup, POW/MIA Chair and Flag, Alter-Bible, Draping of the Charter, Joint meeting and if so proper set up of organizational flags, sign-in sheets as well as a VIP sign-in sheet, checking valid membership cards, and your Legion Cap

Legion, S.AL. members and Veterans always get escorted to the Left (American Flag Side) and Auxiliary and non-Veteran members to the right around the organizational flag. Important to ask guest if they are a veteran prior to the start of the meeting and properly instruct them how you will be escorting them to the podium. Inform them that you will be approaching the American flag and either a hand salute for Veterans or hand over the heart for non-veterans then to the appropriate side of the Hallowed Grounds – Never breaking them.

When escorting you always have the person on your right side with light hold of their left arm when escorting.

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Set up Room

When setting up any meeting the American Flag should be posted on the speaker's right. All other flags should be placed on the speakers left.

The eagle on the American flag is to be facing to the rear until posted, when it will be turned to the front. The eagle on other flags will be facing the front at all time.

Flag standards should be adjusted a to not let the flag touch the floor/ground at any time.



When the American Flag is properly posted during a meeting or ceremony, anyone approaching or passing by or near the flag should render a salute when wearing an authorized Legion cap. If a person is not wearing a authorized Legion cap, then that person should place their hand over their heart instead.

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Questions

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Post Finance Officer

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Overview

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Post Finance Officer's Charge

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Finance Officer Role:

All Finance Reports that are given must be approved by the membership. The member that wishes to make the motion stands, is recognized by the chair, states their name and then makes a motion to approve the finance report as read subject to audit. Generally, the motion is seconded followed by discussion and then the commander calls the question.



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Finance Officer Responsibilities

The finance officer must give a financial report to the membership monthly per Post and Departments Constitution & Bylaws.

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Writing Checks / Paying Invoices

Suggestion is to setup all reoccurring bills on Autopay.

It is strongly suggested that all checks must have two signatures.

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Bank Account Expenses & Deposits

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Tracking Expenses & Reporting

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Tracking Expenses & Reporting (cont'd)

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Licenses & Certificates

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Questions



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Post Judge Advocate

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Post Judge Advocate Charge

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Post Judge Advocate Role

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Complaint Procedures

In most cases, these conflicts involve the Post Lounge, financial concerns, or other issues involving Post operations.

If the concern involves the upper echelon of the Post Leadership or is not properly addressed at the Post level contact the District Commander for assistance.

If the District Commander is unable to easily resolve the matter and further investigation is recommended, a member of the Post must submit a letter to the Department Headquarters providing a detailed outline of the concern, violations of National, Department, and/or Post By-Laws, actions already taken (i.e. contacted Post Leadership and/or District Commander) and evidence if possible. A current paid member of the Post must sign the letter. Once received the Department Commander will review the request and determine if an investigation is warranted.



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Post Investigation Flow Chart

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

Should the Department Commander decide that there may be some cogent reason to use some other individual to conduct the investigation/mediation, they shall, in consultation with the Area Commander in which the Post is located, detail some other member of the Department to conduct the initial investigation/mediation.

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

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If Post officers are unable or refuse to comply with these directions, The Department Commander shall detail a Past Department Commander, in conjunction with the District Commander in which the Post is located, to take these actions providing specific detailed guidance for management of all of the affairs of the Post is required. In this event, every effort shall be made by the Past Department Commander and the District Commander to return complete control to the regular officers of the Post at the earliest opportunity if it is determined that such return of control is in the best interest of the Post and Department.

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Who is responsible for the cost of the investigation?



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Trials & Appeals

Question: Can a Post Officer be removed from their position? Not unless they are found guilty through a fair trial or resign their office.

The Post Judge Advocate:

- Must ensure trial is prompt, complete and thorough, make arrangements for hearings, the summoning of all witnesses and production of all papers.
- See that all orders of the subcommittee are carried out through completion.
- Examine and cross examine all witnesses.

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Rules Governing Trials

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Rules Governing Appeals

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A Path to Success

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Questions

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Department Training 2023 - 2024