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Serving Veterans,  
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# American Legion Auxiliary Department of Wisconsin ALA in the Know “Back to Basics” September 2023



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# Welcome Auxiliary Members and Guests



# Program Opening

**Prayer**

**Pledge of Allegiance**

**Preamble of the American Legion**

**Auxiliary & Mission Statement**

**Introductions**

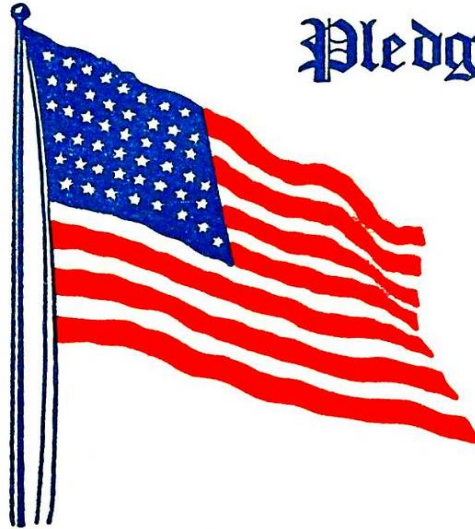
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# Prayer



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# Pledge of Allegiance



## Pledge of Allegiance

*“I pledge allegiance to  
the Flag of the United  
States of America and  
to the Republic for  
which it stands, One  
Nation under God, in-  
divisible, with Liberty  
and Justice for all.”*

NATIONAL DEFENSE COMMITTEE

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# Preamble to the ALA

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 one hundred 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 goodwill on earth;  
To safeguard and transmit to posterity the principles of justice, freedom and  
democracy;  
To participate in and contribute to the accomplishment of the aims and purposes of  
The American Legion;  
To consecrate and sanctify our association by our devotion to mutual helpfulness.

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# Mission Statement

In the spirit of Service, not self, the mission of the American Legion Auxiliary is to support The American Legion and to honor the sacrifice of those who serve by enhancing the lives of our veterans, military, and their families, both at home and abroad. For God and Country, we advocate for veterans, educate our citizens, mentor youth, and promote patriotism, good citizenship, peace and security.



# Program Agenda – Morning Session

Officer Training

Annual Reports

Membership

Group A & B Breakouts

Juniors/SAL

PEP (Program Engagement Plans)/ Re-Branding, Past President's Parley

Questions & Answers



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# President



# President

An official chosen to preside over a meeting or assembly

- The Unit president should be familiar with the duties of all officers and committee chairmen.
- Unit president should preside at all meetings of the Unit and Unit Executive Committee and is entrusted with the success of the Units yearly programs
- Unit president should require adherence to the Constitution and Bylaws, rules and regulations of National, Department and the Unit itself.
- Unit president shall appoint members in standing committees and create other committees as needed

# President / Presiding Officer

- The president should preserve order throughout the meeting
- Follow an agenda if one is prepared for the meeting, handout example agenda.
- Be referred to as the “the Chair”
- Follow parliamentary procedures
- Take no part in any discussion and refrains from expressing personal opinions
- Call on the vice president if she wishes to join discussion or leave the chair.
- Depending on bylaws, may vote or be the tie breaker if needed

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# Secretary



# Secretary

Officer of an organization responsible for its records and correspondence

## The Secretary-

- Is the recording officer of the unit and the custodian of its records.
- Keeps all written records (minutes) of all meetings of the unit.
- Keeps an official membership roll and call the roll when it is needed.
- Maintains record books in which Bylaws, special rules of order, Standing Rules and minutes are entered and have these records on hand at every meeting.
- Sends members a notice of each meeting.

# Secretary – Records/Minutes

- **Records**

- Records are received from committees, the secretary should record the date they were received, what action was taken and file.

- **Minutes**

- Record of what was done at a meeting, not what was said by the members.
- Should never reflect the secretary's opinion favorable or otherwise.
- Should include, unit name, kind of meeting, date, time and place.

## Secretary Cont'd

- Include name of person presiding over meeting
- Statement of approval of previous meetings minutes
- List of motions adopted or otherwise disposed of. If the motion is disposed of this needs to be specific; what was the assembly voting for or against.
- Should state the hour of adjournment in the last paragraph
- Can be distributed prior to the meeting or read at the meeting. If no corrections are noted, they are approved as read and no motion is required to approve

### **Additional rules and practices**

- Name of the seconder of a motion should not be entered into the minutes unless ordered by the members
- When ballot vote is ordered, the number of votes on each should be entered, when voting by roll call, names of those voting on each side and those answering “present” should be entered

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# Treasurer





# Treasurer

Officer entrusted with the receipt, care and disbursement of funds

- The unit treasurer shall handle all funds of the unit, including dues from members and make remittance
- Cash should never be sent through the mail
- Any income derived from membership dues or any other income source belong in the unit treasury and shall not be kept in a member's personal bank account
- All bank accounts shall be opened with the unit's federal EIN (Employer Identification Number)
- It is recommended that all bank accounts have two or more authorized signers and current signature cards are maintained at the bank

# Treasurer Cont'd

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- Treasurer is responsible for providing a monthly financial statement to the unit. After reporting, there is no need for a motion to approve.
- Authorized signers should never sign a blank check
- Accurate, detailed records of every financial transaction should be maintained. Payments should only be made upon proper authorization by the unit.
- The 990-N IRS form needs to be completed and filed with the IRS. If you need assistance with this just contact Bonnie Dorniak at Department Headquarters.

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# Document Retention



# Document Retention

- Make a list of the types of paper records your Unit generates
- 2 or more people should be given responsibility for filing, keeping, and destroying records
- Keep your paper records in a safe location
- Electronic records should be backed up least weekly

Accounting Files – recommended retention is current year +7yrs

Communications(Public) – permanent

Administration – Annual reports – permanent

Charter documents – permanent

Constitution & Bylaws – permanent

Membership – PUFL – 3 years, Dues Deposits – 7 yrs.

Reports – Current year + 6 mos.

**More retention information can be found in the American Legion Auxiliary Department Operations Guide**

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# Annual Reports



# Annual Year-End Impact Reports

- **Why report these numbers?**
  - Every hour, every dollar ALA members invest in our mission of helping veterans adds up. Gives each member a sense of pride.
  - These numbers proclaim our impact and make membership in the ALA meaningful.
  - Each small sum of numbers gets added into the collective numbers = Impact Numbers
  - These numbers are reported to The American Legion, which includes them in its annual report to Congress.

# Reports Cont'd

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- Each member should fill out the Member Tracking Form and give to the unit president at the close of the Auxiliary year probably end of March or early April.
- Each Committee should complete an Event Report and attach a narrative covering the event as well as pictures. Pictures speak a thousand words!
- The unit president or committee compiles all of the member data on the Unit Form and adds any additional information which was not reported.

# Reports Cont'd

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- It is important to report your hours/dollars in one section of the form rather than worry if you have selected the right category.
  - Example: Service for children, if you volunteered at a military camp, Service for Military Families. If you volunteered at a camp for all children, then Service for Children & Youth. Just not both places.

Downloadable fillable monthly tracking worksheet and annual report form is under the Members Only, Annual Report Forms section on the national website: [www.ALAforVeterans.org](http://www.ALAforVeterans.org)



# Membership

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## 2024 Membership Year



 AMERICAN  
**LEGION**  
AUXILIARY

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**AMERICAN  
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# Break



# Breakout Sessions

- **Group A - Leadership**
- **Group B - ALA Badger Girls State**



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# Juniors



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# OUR JUNIORS – OUR FUTURE



# Patch Program

## Juniors and young SAL

Red Level – Kindergarten – 3<sup>rd</sup> grade

- Children of Warriors Natl. President's Patch
- 10 other program patches

Gold Level – 4<sup>th</sup> – 8<sup>th</sup> grade

- Children of Warriors Natl. President's Patch
- 10 other program patches

Blue Level – 9<sup>th</sup> – 12<sup>th</sup> grade

- Children of Warriors Natl. President's Patch
- 12 other program patches

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# Involve with Legion Family

- **Auxiliary**

- Lead the Pledge
- Read the prayer
- Distribute poppies
- Help with fundraisers
- Make favors for VA
- ???

- **Legion**

- Fish Frys
- Brat Frys
- Clean up post home
- Help at Flag Disposals
- Play TAPS at funerals
- ???

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# Juniors

## Reporting

- **Junior Unit of the Year**
- **Junior Member of the Year**

Did your Junior(s) have a successful project? Do they always help with Unit projects? Write a narrative report detailing what has happened through the year and fill out the cover sheet. I want to send a great report on to National for recognition!

## Military Child Table

An Air Force Officer was asked what he needed in Iraq, he said, 'Please don't send cookies, care packages, or socks. Just help take care of our children.'

Here is the ceremony for you to present at your Unit or Post

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# Sons of the American Legion



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# SAL Children & Youth Programs

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# ALF Dog





# ALF Dog – Wisconsin Program

## ALF Dog Program

- Replaced Josh Dog when Dr. Lang shut down the program. Was NOT owned/run by the Legion
- Detachment focus - Children/Grandchildren of deploying soldiers
  - Coordinated at State level to minimize need for local units to have to purchase/maintain inventory
  - Typically invited by the local military group, do NOT show up on our own
  - Do try to involve the AL Family, but many times restricted to number of people who can attend ceremonies
  - Can/will provide individual dogs for any child missed who recently had a parent/grandparent deployed

## ALF Dog – Cont'd

- **Currently working to have this nationally recognized like the Josh Dog program was.**
  - Have it added to the CSR Forms
  - Support other Detachments in starting up their program
  - Other uses have been considered, but not currently a part of the program at a Detachment level
    - Hospital Dogs
    - Police/EMT/Fire Fighters
    - Other

## ALF Dog – Cont'd

- Want to keep at no cost to the military/families, so continue to look for donations to the program
- More information at [www.wisal.org](http://www.wisal.org)

# 5 Point/10 Ideals Program National Program

- Focus is on the younger members
- Similar to the ALA Patch program
- Typically includes instruction, interactive activities, and demonstration of understanding
- Does include awards after successful completion

# 5 Point/10 Ideals Program – Continued

- **Topics:**
  - Emblem and Uniform Cap
    - Meaning within the emblems
    - Distinction between different caps
  - 5 Points of Service
    - Patriotism – Love the Flag, love of Country
    - Citizenship – Individual obligations to citizenship
    - Discipline – Respect for and obedience to rulers
    - Leadership – Participation in Group Activities
    - Legion – Knowledge of The American Legion

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# 5 Point/10 Ideals Program – Continued

- **10 Ideals Topics**

Patriotism

Faith

Health

Helpfulness

Knowledge

Courtesy

Training

Reverence

Honor

Comradeship

- **Information on the SAL National Website, publications area**

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# PEP, ReBranding, PPP, & Questions



# PEP – Program Engagement Plans

- **PEP – Program Engagement Plans**
  - New title for Plan of Actions – watch as the new plans are available, contact your Department Chairpersons for complete information.





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# PAST PRESIDENT PARLEY (PPP)

# Past President Parley (PPP)

- **The purpose of the Past President Parley is for members who have served as unit, county, district, department or national presidents to continue in the active service of the Auxiliary.**
- **PPP application is located on the website you to sign up.**

# Re-Branding

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- **ALA receives branding refresh**
  - The current traditional blue star emblem is still valid
  - New brand for the next era. Note the logo on the top left of this screen.
  - Review the handout on Branding which is available
  - Complete information can be located on the website under “The American Legion Family Branding Guidelines

# Questions

- Need help with evaluating our bylaws- local constitution?
- Distribution of end of year funds, what accounts money can go to? (General or Rehab)
- Installation of officers – Unit, County no consistency – confusing
- When do new officers begin their positions.?
- Auxiliary year when does it begin?
- Membership goes from when to when?
- Officer's terms: Local, District, Department?

## Questions Cont'd

- Meeting etiquette – breaking the plane, POW/MIA table, guest speakers/meeting guests where should they sit, when do they get introduced, time limit, compensation.
- What do other Units do for Fund Raising?
- What do other Units do for Americanism?
- Unit discipline/policy/procedures
- How can we help the Veterans in our own community “more”?

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# Afternoon Session

- Breakout Sessions
- Constitution & Bylaws/Motions
- Q & A



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**See you back in  
45 minutes**

# Breakout Sessions

- **Group A - ALA Badger Girls State**
- **Group B - Leadership**



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# Constitution & Bylaws



# Constitution & ByLaws

- **By definition, a constitution of an organization contains the basic principles along which an organization should operate.**

# Constitution & Bylaws Con't

- **The constitution may contain the:**
  - Name and purpose of the organization
  - Membership eligibility
  - Officers and how elected
  - How to amend

The constitution should consist of fundamentals that, for the most part, are not going to be changed

# Constitution & Bylaws Con't

- **Bylaws are a more specific set of operational rules that specify how an organization is to be run. They follow the basic principles set by a constitution and allow the organization to run in an effective and orderly manner.**

# Constitution & Bylaws Con't

- **Bylaws should be constructed with the ability to change.**
  - Describe executive committee
  - Duties & powers of the officers
  - Dues
  - Meetings
  - Elections
  - Committees
  - Transfers
  - Discipline
  - Parliamentary authority
  - How to amend

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# Processing Main Motions



# Parliamentary Procedures – Processing Main Motions

- A main motion is a formal proposal for consideration and action.
- One main motion can be considered at a time.
- No other main motion can be considered while another main motion is still being considered.

## **Main Motions that are not in Order**

- Conflict with the governing documents of the unit.
- Same question as previously rejected during the same meeting

## Motions Cont'd

### Steps in Processing Main Motions

- A member addresses the chair
- The chair recognizes the member
- The member states the motion “ I move that we have a canned food drive”.
- Another member, without recognition, seconds the motion, “Second”
- The chair states the motion and places it before the members for discussion. “It is moved and seconded that we have a canned food drive. Is there any discussion?”
- Members have the right to debate the motion. This is the time that the motion is perfected and final decision is made.



- When the discussion is finished the chair puts the motion to a vote. “The motion is open that we have a canned food drive. Those in favor, say ‘aye’.” “Those opposed, say ‘no’.” The ‘ayes’ have it Motion Passed. We will have a canned food drive.”

# Amending Motion

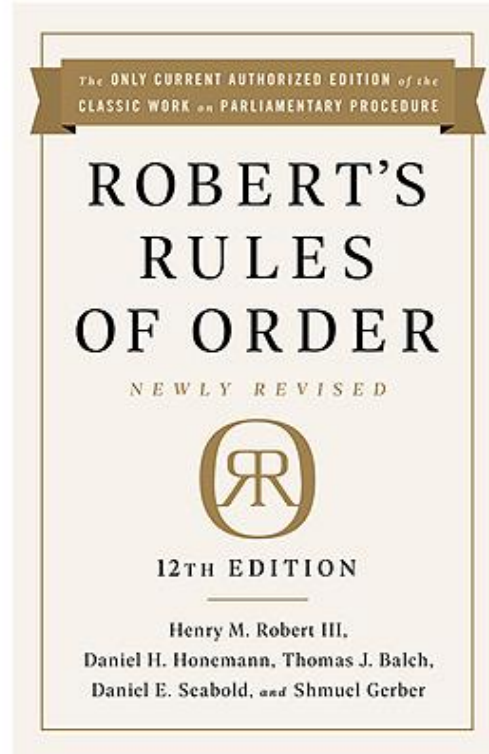
## Process of Amending a Motion

- Once a motion has been made and it is still in the discussion stage changes can be made. This can be done by simply changing the wording of the motion. “I make a motion that we hold a canned food drive” during discussion a member wants to make the food drive to be an annual event. The motion would then be changed to “I move to amend the motion that we have an annual canned food drive held in the month of April.”
- At this time, it is opened for discussion again. If at the time, there are no more changes it can be put before the members for a vote.

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# Robert's Rules of Order 12<sup>th</sup> Edition Available at Emblem Sales



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# Breakout & Program Recap

- Comments and reports on breakout sessions
- Session recap
- Final questions



HAVE FRIENDS



WILL TRAVEL