



American Legion Auxiliary  
*Department of California*

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# **District President's Guide**

Acknowledgments: Information contained in this guide was accumulated from various sources as well as the American Legion Auxiliary guidebook. All this information and forms can be obtained from the Department Website at [www.calegionaux.org](http://www.calegionaux.org) or the National Website at [www.alaforveterans.org](http://www.alaforveterans.org)

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## American Legion Auxiliary *Department of California*

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## Chapter 1- Article XII District Organization

The top priority of any District Officer, especially a District President, should be to review the District's Constitution and Bylaws, Standing Rules, [Department Constitution](#), [Bylaws](#), [Standing Rules](#), and [Department Code](#). The majority of your questions can be answered by these documents. Below are some important items for reference.

- The officers of the Districts shall be President, First Vice President, Second Vice President, Junior Past President, Secretary/Treasurer, Historian, Chaplain, Sergeant-at-Arms, Assistant Sergeant-at-Arms, Parliamentarian and Executive Committee Persons.
  - The District Secretary/Treasurer, Historian, Chaplain, Sergeant-At-Arms, Assistant Sergeant-At-Arms, and Parliamentarian may be elected or appointed by the District President. Please refer to your District Bylaws for who is elected and who is appointed.
  - The District Secretary/Treasurer may be divided.
  - No person shall hold more than one District office at the same time.
- The District Officers shall be elected annually, not earlier than forty-five (45) days nor later than fifteen (15) days prior to the opening of the forthcoming Department Convention.
- Voting in the Pre-Convention District caucus shall be by regularly elected delegates to Department Convention or alternates, serving as delegates, to the forthcoming Department Convention, Department Officers, District Presidents, Past Department Presidents, Department Chairmen, Members of the Department Finance Committee, Girls State Director, Junior Conference Director, and Hospital Representatives in good standing in their respective Districts.
  - Payment of Unit Convention Delegates Registration Fee covering full voting strength of the Unit must be paid prior to the District pre-convention caucus.
  - District pre-convention caucus shall nominate and elect a delegate and/or alternate for National Convention, or by vote of the District delegates by caucus assembled at Department Convention.
- Each District shall hold no fewer than two (2) nor more than twelve (12) meetings per year, including the pre-convention caucus.
  - When District Bylaws provide for a delegated District body, the District voting delegation shall be all District Officers, District Chairmen, and such others as the District Bylaws have accorded voice and vote. All Department Officers, Past Department Presidents, Department Chairmen, Members of the Department Finance Committee, Girls State Director, Junior Conference Director, and Hospital Representatives in good standing in their own Units shall be voting members of said District.
  - All members of District present in District meetings shall be entitled to voice and vote, except in pre-convention caucus.
- A quorum shall exist at District meetings when one-third of the Units in good standing are wholly or partially represented.
- The District shall be financed by a District per capita tax not less than two cents (2¢) or more than fifty cents (50¢). This fund to be used for courtesies and operating expenses of the District.

- Said per capita tax shall be based on Unit membership forty-five (45) days prior to the opening of the Department Convention. This tax shall be due September 1st, and delinquent February 1st, providing written notice has been mailed to the Unit prior to delinquency date.
- Units chartered after close of membership books shall pay District per capita tax on charter membership roll.
- Noncompliance with this rule shall forfeit the right of the Unit of their pre-convention caucus and convention representation.
- Each District shall have Bylaws to cover the needs of the District, so long as they do not conflict with the Department or National Constitution and Bylaws or rulings. Districts may have standing rules to cover situations not covered by the bylaws, providing they do not conflict with the Department or National Constitution and Bylaws or rulings. District Bylaws and amendments before becoming effective must be approved by the Department Constitution and Bylaws Chairman, and signed by the Department President. District shall submit two (2) complete copies of bylaws and four (4) signature pages or four (4) copies of proposed amendment bearing dates of first and second reading and signature of District President and District Constitution and Bylaws Chairman with proper spacing allowed for date and signatures of Department Constitution and Bylaws Chairman and Department President. Department Chairman will keep one copy for their file, send one (1) copy to Department Office file and return two (2) signature pages to
  - District to be attached to District President's file and to District Constitution and Bylaws file.
- The Department of California, American Legion Auxiliary, shall automatically conform to the redistricting plans of The American Legion as to Districts. Refer to the Department Bylaws, Article I. Refer to Article VII for District Organization.

### **General District Information**

- The Unit is part of a DISTRICT
- The District is comprised of all Units
- The officers of the District are elected as stated in District Bylaws
- At the District meeting (called CAUCUS) in May or June, the officers to serve for the following year are elected and there are two names proposed as candidate for Delegate and Alternate to National Convention.
- Unit Chairmen prepare year-end reports that MUST be sent to the District Chairman in order for the District programs to be counted. In turn the District files year-end reports to the Department.
- DISTRICT meetings are a combination of sharing information and the distribution of plans and bulletins to make the organization function in a businesslike manner.

## Chapter 2- District President

**All District Presidents must remember to be impartial while presiding and not participate in discussion.**

### **Duties of the District President**

The District President must be an able and qualified leader, for they represent the Auxiliary in their community, and its success or failure depends largely upon their shoulders. They should act in a supervisory capacity, be familiar with the duties of all officers and committee chairmen and encourage and inspire them in their work. It is the responsibility of the President to see that all officers are supplied with all available information and material from Department and National Headquarters for efficient promotion of their various activities.

The District President has many duties. They should preside at all meetings of the District and the District Executive Committee; require strict adherence to the Constitution and Bylaws, and rules and regulations established by the National and Department Convention, National and Department Executive Committees and the District itself; appoint members of standing committees and create such other committees as are necessary; appoint all non-elected officers, and perform all duties which are assigned to their office.

### **The President as Presiding Officer**

- Calls the meeting to order at the designated time and, if a quorum is present, proceeds with necessary business.
- Preserves order throughout the meeting.
- Follows the accepted order of business.
- Refers to self as “the Chair.”
- Decides parliamentary questions. The President states the motion clearly after it has been seconded and before allowing discussion.
- Takes no part in any discussion while presiding; refrains from expressing a personal opinion on questions before the meeting; avoids all personal bias when giving information to the organization.
- Calls upon the Vice President to preside if they wish to speak on a motion or leave the chair. Remains out of chair until the vote on the pending motion is taken.
- May vote according to Bylaws.
- Recognizes a member who has not spoken previously on the question in preference to one who has spoken.

### **District President’s Official Visit to Units**

As District President you are required to make an official visit to each of the Units in your District. The following suggestions will help you prepare for those visits:

- Prepare a basic speech addressing the programs, particularly the major programs that you will use for every Unit.
- Review the Unit’s membership standing and donations to Department. If they are doing well, tell them. If they are not, encourage them and tell them what they need to do. Add notes or temporary stickers to your prepared speech to remind you of anything you want to address that’s not already in your prepared speech.

Check with the Unit President to see if there is any particular subject they would like you to address during your visit.

- Include information on across-the-board donations to Department listed in the Convention Book of Reports (Americanism, Children and Youth, Education, Past Presidents Parley, Veterans Affairs and Rehabilitation and Gift Shop and Patient Remembrance for hospitalized veterans.)
  - If Unit funds are limited encourage them to donate more to the programs on the Department level that are spending more than they take in, i.e., VA&R, Patient Remembrance and Gift Shop and Education.
- Add any special projects that you, the Department or National may be promoting
- Prepare your speech for that new member in the audience. If they understand it, everyone will understand it.
- Include information on Department fundraisers for selling Department President's pins and Department President's Club. Keep in mind there may be members who don't know why they make donations to the Department. Explain what their donations support and that all of these programs are dependent upon donations to keep them available and without donations they'd have to be discontinued.
- On occasion, you may be asked to obligate or initiate new members. Refer to the Auxiliary Manual of Ceremonies. If you can read the small print you can use the book...if not, suggest you type on cards. The Unit President should inform you before you get there that they want you to do a ceremony, but it wouldn't hurt to have your cards with you just in case they didn't tell you. Make it your business to know what is happening in the Units within your District. Inspire, encourage, motivate and acknowledge. Have a positive attitude...leave negative thoughts at home.



## Chapter 3- District Officers

The success of the District depends to a large degree upon the efficient and businesslike administration of all of its activities. Each District officer and committee chairman shares in this responsibility. Each should familiarize themselves with the duties of their office and fulfill such obligation to the best of their ability.

### Procedure Books

It is very important that each District Officer and Chairman start a procedure book immediately. Each should compile their own book to reflect what was done in their year. Remember that a procedure book given to you is a guideline and should be used for reference only, not added to or altered. Following are some guidelines for starting your procedure book. Any sort of binder may be used. Since a procedure book is basically a file, it is very helpful to use dividers. Suggested contents:

- Agenda
- Roster – District Officers, Chairmen, District Presidents and District Program Chairmen
- Budget – Copy of District budget. Especially applies to Americanism, Girls State, Past President's Parley, Public Relation, VA&R, Chaplain and Historian, but all chairmen should include it.
- Bulletins – Copies of your articles or bulletins you send to Units.
- Calendar of Events
- Correspondence (Pertinent)
- District Constitution/Bylaws & Standing Rules – A current copy of the District Constitution/Bylaws and Standing Rules as approved for the current year.
- Dept. Information – Include your program's plan of work with the bulletins you receive from your Department Chairman, as well as program and miscellaneous information from the Department Office.
  - Convention/DEC/Workshop Information
  - Copies of District Minutes
  - Basic Protocol
  - Code – A copy of the Department Code. (especially for your program)
- Reports (District) - Copies of the reports you give at district meetings. Remember to give a copy to the Secretary to be attached to the minutes and copies to the Historian and President so they will have them to write the district history and president's year-end report.
- End-of-Year Annual Report Forms. Reports (Annual) - copy of your completed district annual report form and supplemental reports along with winning District reports and supplemental reports that are forwarded to Department for competition.
- Miscellaneous – this is where you would file any pertinent information you feel will be helpful to the next chairman.

## Chapter 4- District Meetings

### Installation of Officers

District officers should be installed immediately following their election or as soon thereafter as possible. While installations of officers are desirable, they are not mandatory. An officer takes possession of their office immediately upon their election unless the bylaws or other rules specify a later time.

### Conducting a District Meeting

The manner in which a District meeting is conducted has a great bearing on its success or failure. Unless a meeting is well planned, intelligently conducted, and subjects are presented and discussed interestingly, members cannot be expected to be faithful attendees. Routine business should be transacted in an efficient manner, yet the opportunity should be presented for active participation of members in the program.

It is most important that District elections and all District business be conducted in accordance with District Bylaws, the current edition of "[Roberts Rules of Order, Newly Revised](#)", and Department and [National Constitution and Bylaws](#). All District Presidents must remember to be impartial while presiding and not participate in discussion. **The majority vote rules, but the minority has the right to be heard.**

Committee members and officers may transact detailed business and should only bring important matters before the District for decision. Special monthly activities should be stressed, and District and Department officers as well as local speakers should be asked to add interest to the programs. Variety should be introduced in music and entertainment.

### Suggested Order of Business

While this suggested order of business for District meetings includes items that will not be used at every meeting throughout the year, this may be of some assistance to presidents of new Units and to others who are not entirely familiar with the business to be transacted. The order should be modified to fit the circumstances of the particular occasion.

- Call to Order
- Advancement of Colors (optional) Salute to the colors if colors are not advance
- Prayer
- Pledge of Allegiance to Flag
- National Anthem or other patriotic song (optional)
- Preamble to the Constitution of the American Legion Auxiliary
- Roll call of officers
- Reading and approval of minutes of previous meeting
- Treasurer's Financial Report (If guests are attending, suggest this be tabled until next month)
- Initiation of candidates (quarterly, biannually, or annually, as is the Unit custom)
- Reports:
  - President
  - Secretary
  - Treasurer
  - District Officers
    - First Vice President

- Second Vice President
- Junior Past President
- Historian
- Chaplains
- Parliamentarian
- Sergeant at Arms and Asst Sergeant at Arms
- Executive Committee
- Standing Committees
  - Americanism
  - Auxiliary Emergency Fund
  - Children & Youth
  - Community Service
  - Constitution and Bylaws
  - Education
  - Girls State
  - Junior Activities
  - Leadership
  - Legislative
  - Membership
  - Music
  - Past President
  - Poppy
  - Public Relations
  - Veterans Affairs and Rehabilitation
  - Special Committees
- Reading of communications, including those from National, Department and District officers
- Unfinished business
- New business
- Election and installation of officers
- Announcements
- Program – educational and entertaining (optional)
- Adjournment of business meeting
- Closing prayer
- Retirement of Colors (optional)

The American flag and the banner of the American Legion Auxiliary in miniature and in a small stand should not be used for the advancement or retirement of colors, as the stand of colors was not intended to be used for this purpose.

### **Department President's Official Visit to District**

- The Department President makes an official visit to every District to find out how they are doing, meet the members and provide up-to-date information on the many programs sponsored by the Auxiliary. Don't set aside the business aspect of your District meeting for their visit... they want to hear the reports. This is a golden opportunity for you to show off your officers and chairmen and the wonderful job they are doing...take advantage of it and they will enjoy hearing the reports.

- Make sure the District Distinguished Guest Chairman is ready to greet the Department President when she arrives at the designated location (whether a meeting or somewhere else). It is the Distinguished Guest Chairman's responsibility to introduce the Department President to the members present while the District President is preparing for their meeting.
- If a gift or corsage is to be presented, pin it on them prior to the meeting and arrange for the bill to be submitted at another meeting, not when the guest is present.
- If there are guests present who are members of the Auxiliary, and it is customary for your District to escort, following is the correct group order, the lowest ranking group first.
  - District Chairmen
  - District Officers (not including the District President)
  - Past Department Presidents
  - Hospital Representatives and Poppy Production Managers
  - Current Department Chairmen
  - District Presidents
  - Current Department Officers
  - Current National Officers or Chairmen
  - National Executive Committeewoman
  - Department President
  - National President
- When there are two or more guests in any of the above groups, the Distinguished Guest Chairman escorts the Chairman or Senior member of the group, and asks the other members of the group to follow right behind them.
- The Department President is always the most Distinguished Guest during their visit and takes precedence over any other dignitary, regardless of title.
- The Department President is always escorted alone. The assembly arises when they are escorted.
- The Sgt-At-Arms and Assistant Sgt-At-Arms walk in front, followed by the Distinguished Guest Chairman and Distinguished Guest.
- Upon reaching the Presiding Officer's station, the Sgt-At-Arms and Assistant Sgt-At-Arms step aside and wait while the Distinguished Guest Chairman presents the guests to the Presiding Officer. The Presiding Officer shakes the hand of each guest as presented, and seats them before any other guests are presented. After the complete group has been presented and seated, the Sgt-At-Arms and Assistant Sgt-At-Arms about-face and, followed by the Distinguished Guest Chairman, return to the rear of the room.
- The Presiding Officer does not present any guest to the assembly until all guests have been escorted and seated.
- The Presiding Officer is always at the center of the head table. At a business meeting, the Parliamentarian should always be seated to the right of the District President during the business part of the meeting. The Department President is to be seated immediately to the right of the Parliamentarian.
- Introduce one not known to the assembly; present one who is already known to the group. Introduction or presentation of honored or distinguished guest should be gracious but short. The higher the office, the shorter the introduction.
- When you introduce or present guests of honor, and they are simply to rise and bow, you introduce the highest-ranking guest first and go down the list. (see enclosed sample list). If your guests are each to say a few words of greeting or

congratulation, then start with the lowest rank and go up the list, thus the last expression comes from the top-ranking officer or guest.

- When introducing or presenting a speaker, be sure you have the name and title correct. Identify the speaker, give qualifications through a brief history or biography then turn to the Department President and repeat their name only. (This is their cue to rise.) You lead the applause, and then are seated.
- National, Department or District Officers and Chairmen are always introduced or presented when they are visiting a meeting. The Distinguished Guest Chairman introduces the highest-ranking guest first and go down the list.
- When Department Officers or Chairmen are present at their own Unit or District meetings, they should be escorted at the first meeting after election or appointment and upon the occasion of official visits of other Department Officers or Chairmen, special meetings, installations or when there are distinguished outside guests. At all other times they take their place in the audience as a member. They should, however, be introduced from their places in the audience. When visiting other than their own Unit, District, etc., they should be escorted.
  - If they bring a companion, be sure they are introduced to the assembly.
  - If possible, have a container of water and glass available on the head table.
  - When they conclude, you rise and thank them. If a gift is to be presented, do it at this time. If they have to leave, have them escorted from the meeting to their transportation.
  - If newspaper or newsletter publicity appears following their appearance, or if photos or informal pictures are taken during the meeting, it is a nice gesture to send these photos to them.
  - A letter of appreciation or informal note from the District President to the Department President is a must.

### **Advancement of Officers**

All Past Department Presidents precede the current Officers. The Department President, if present, is always last in line. The National Executive Committeewoman precedes the Department President.

### **Advancement of Guests**

The Distinguished Guest Chairman should meet the guest at the door of the meeting room. The guest is then escorted down the aisle on the Chairman's right upon receiving a signal from the chair. The guest should have been notified in writing as to whether the meeting is formal or informal, the time and place of the meeting, amount of time allocated for their speech, and whether or not they are to respond to the introduction.

### **Seating of Guests**

The guest of honor is always seated at the right of the presiding officer; the second most important guest is placed at left of the presiding officer.

### **Outside Speakers**

As a matter of courtesy, when outside speakers are engaged, they should be given a check for expenses as agreed upon immediately after they leave the platform. A podium should always be provided for outside speakers.

## Chapter 5- Annual Audit and Tax Requirements

### **Unit/District Audit of Financial Records**

All Units and Districts are required to have their financial records audited annually. Units are to submit copies of their annual audit, IRS filing, FTB filing, and Attorney General filing to their District President no later than September 30th. District President will collect copies from all Units and District and forward copies to the Department Office no later than October 30th.

### **Federal Compliance and Tax Laws**

Even non-profits without employees are required to obtain a Federal Employee Identification Number (EIN), also referred to as a Federal ID number.

National Headquarters is required to supply to the IRS the complete mailing address and employer identification number (EIN) of each newly chartered Unit. The IRS further requires that the list of Unit EIN's be updated annually. National fulfills this requirement based upon the EIN's provided by Units to their Department Headquarters. If a Unit files a tax return annually, their EIN should not change. However, Units that fail to meet the annual filing requirement may lose their originally assigned EIN and will be required to apply to the IRS for a new number.

Beginning in 2008, the IRS requires small tax-exempt organizations to file an annual electronic notice. The form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations not required To File Form 990 or 990-EZ, is required of tax-exempt organizations whose annual gross receipts are \$50,000 or less. Units must file Form 990 or 990EZ if their annual gross receipts are greater than \$50,000. The Pension Protection Act requires the IRS to revoke the tax-exempt status of any organization that fails to meet its annual filing requirement for three consecutive years. The e-Postcard is due every year by the 15<sup>th</sup> day of the fifth month after the close of your tax year.

Organizations that do not file the notice will lose their tax-exempt status as of the filing due date of the third year. All organizations that file Form 990 (including 990EZ, 990-N, and 990T) are required by law to make the form available for public inspection upon request during regular business hours and at the organization's principal office or at a reasonable location if there is no office.

NOTE: When you file 990N, note what date the IRS has for your fiscal year as this makes a difference when your filing is due. The Auxiliary fiscal year is July 1 to June 30th. If your fiscal year appears as January to December, you need to submit form 1128 requesting fiscal year be changed from January to December to July 1 to June 30th. This form must be sent to: Internal Revenue Service 1973 N Rulon White Blvd M/ S 6273 Ogden, Utah 84201.

### **State Compliance and Tax Laws**

All Units are mandated to file the California 199. Units that have Gross Receipts normally equal to or less than \$50,000 can file the e-Postcard 199n.

The California e-Postcard is due every year by the 15th day of the 5th month after the close of your tax year. If the due date falls on a weekend or state holiday, file

by the next regular business day. You cannot file the California e-Postcard until after your account period ends. There is no extension of time to file.

**Registry of Charitable Trusts**

If a Unit or District solicits funds from the public in any way for charitable or public beneficial purposes would be required to register even if it accounts for those funds on a group return. If a unit is individually incorporated as a public benefit corporation the unit would be required to register. (Distribution of Poppies would be considered a fundraiser soliciting funds from the public for charitable purposes). If Unit/District only receives funds from within their membership and doesn't solicit funds from the public for charitable purposes, they are not required to file.

<p>Attorney General's Office Registry of Charitable Trusts</p>	<p>Must file form <a href="#">CT-1</a> within 30 days of receiving assets for charitable purposes</p>	<p>Both Incorporated and Unincorporated Units are required to register with the Attorney General Office- Registry of Charitable Trusts by initially filing the CT-1 Form which is the Initial Registration Form State of California Office of the Attorney General Registry of Charitable Trusts and the RRF-1 and CT-TR1 must be filled out and filed annually after that. A fee of \$50 must be submitted when you initially file. Please refer to form RRF-1 for fees based on annual revenue.</p>
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**Secretary of State**

<p>Secretary of State</p>	<p>Incorporated Units must file Statement of Information (Form <a href="#">#SI-100</a>) listing contact information for Unit Officers</p>	<p>Unincorporated Units must register with the Secretary of State one time by filing Sec/State Form <a href="#">#LP/UNA 128</a> and paying a \$10 fee. This is a one-time filing and Unit doesn't have to file anymore unless they want to alter previously submitted information or to cancel if the Unit turns their Charter in.</p>
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## Chapter 6- Relationship between District and Department

The District is an integral part of the Department and close contact must be maintained at all times between the District and Department Headquarters. Immediately following the election or appointment of a District officer or committee chairman, their name should be reported to Department Headquarters so that they may receive information and guidance in their work from the corresponding Department officer or chairman. Reports of activities should be made as requested by the Department.

### **Department**

Department is the state in which you are a member. This is the DEPARTMENT OF CALIFORNIA with headquarters office in San Francisco, 401 Van Ness Ave., Ste 319, San Francisco, CA 941402-4570

The Department of California is comprised of 30 Districts. The Officers of the Department are elected at convention in June.

The Executive Committee of this Department is made up of the Department President, Department Vice President, Junior Past Department President, NEC Person, Parliamentarian, Department Secretary, Department Treasurer, District Presidents, Department Chairmen of Standing Committees, Members of the Finance Committee, Girls State Director, Junior Conference Director, and Past National Presidents. The Department Secretary or Treasurer (if paid) and Parliamentarian shall be a non-voting member of the Executive Committee and a voting member of the Department Convention. They are called to a meeting in January for unit actions, mid-year Department reports, and candidate nominations. The Executive Meeting is called prior to the opening of convention and all of the above are requested to be present to vote on recommendations.

### **Monthly Mailings from Department**

Department mails by regular mail packets of information that contains pertinent information that must be shared with members at the Unit and District Meetings. These packets are sent out Bi-Monthly to all Units and District Presidents. Emails from the Department Secretary will be sent at least monthly with information that should be shared with your members. The information in the mailed packets are also always available on the Department Website.

Members can request monthly mailings of the bulletins via email (free) or mail (for a \$30 fee). To receive the packet, complete the [Bi-Monthly Mailing](#) form and email your request to [calegionaux@calegionaux.org](mailto:calegionaux@calegionaux.org). The electronic mailing not only cuts down on the costs but increases the distribution and awareness of the information to a lot more members and to the general public.

If the information is critical and the Unit reports they did not receive the packet, the District President should make a copy of the required form(s) and transmit to the Unit as soon as possible. They should also remind the Unit to contact the Department Secretary.



## **Updates**

Keep the Department Office informed. When there is a change in a chairman's address or there is a replacement, contact the Department in writing. State the old information and give the new information. You can either do this via email or regular mail. The District Chairmen information is used for many mailings and for the end-of-year reporting. In the case of reporting, changes must be made by DEC otherwise, there is no guarantee that the new information will be included on the back of the report form.

## **Department and National Web Sites**

The Department Web Site [www.calegionaux.org/](http://www.calegionaux.org/) has a lot of valuable information on all programs sponsored by The American Legion Auxiliary. In addition most of the forms you need can be filled out and printed directly from the web site.

The National Web Site address is: <http://www.alaforveterans.org/>. Log into this website to view it as an Auxiliary Member. The website is set up to be seen by people looking to join the Auxiliary. Items members are looking for will likely need you to be logged in to view.

## **President's Club**

American Legion Auxiliary President's Club was established as a fundraiser for the ALA, Department of California General Fund in 2005. 100% of all funds donated except 3-5% to cover costs to administer this Club will be credited to the General Fund.

Due to overwhelming comments from Auxiliary members who wanted to participate in the program, the four donor levels have been removed from the program and replaced by simply donating \$25.00 to become a member. Of course, all donations for any amount will be appreciated and will be accepted to offset the rising costs of General Fund expenses. All donations are tax deductible.

All members donating \$25.00 will be issued a membership card and recognized accordingly as deemed appropriate by the Department President. Additionally, a special gift from the Department President's will be given to donors making a \$25 donation. Smaller donations to support the Department General Fund can be made directly to the Department Office by simply writing a check made payable to ALA, Department of California and mailing it to 401 Van Ness Ave., Ste 319, San Francisco, CA 94102-4570.

Membership in this Club is open, but not limited to, all members, Units and Districts of the American Legion Auxiliary, Department of California.

To become a member, simply fill out the application with a check made payable to the ALA, Department of California for the appropriate amount, earmarked President's Club and mail to the American Legion Auxiliary, Department of California, 401 Van Ness Ave., Ste 319, San Francisco, CA 94102-4570.

### **Department President's Pin**

The sale of the Department President's pins is a fundraiser for the Department of California. The funds collected are considered income for the Department Administrative and Executive accounts and deposited into the General Fund. The dollars raised help defray the expenses of the Department.

Each District President receives an allocation of pins during the Post Convention Meeting. The Department President makes the allocation assignments; the Department Office collects and records the funds. Currently, the pins are sold for \$5.00 each.

It is suggested that the District President divide the allocated pins between the Units in their District. The Units are to be encouraged to purchase the pins and then resell them to their members. The Units transmit the pin income to the District Treasurer who, in turn, transmits the funds to the Department Office. The district then transmits funds no less than twice during the year – December and May.

### **Donations to Department**

It is very important for the District President to encourage donations to Department. The donations that are listed in the Department Convention Book of Reports are: Americanism, Children & Youth, Education (including Poppy Seals), Past Presidents Parley, Gift Shop/Patient Remembrance, and Veterans Affairs & Rehabilitation. All of these programs are dependent upon donations. The amount of donations received one year is the amount of money available for the budget the following year.

The District President receives a report listing all the donations made by Units in their District at DEC and again just before the Close of Books. The District President must verify that this information is correct and can do that by having the Units verify this information. Remember, if you don't take the time to review and correct this information, figures will be wrong in the Convention Book of Reports and you have no one to blame but yourself. If there is a discrepancy, the Unit should contact the Department in writing and include a copy of the front and back of the check in question.

The information the Department Office has by the Close of Books (forty-five days prior to the opening of Convention) will be included in the Convention Book of Reports. Usually, if there are errors in the Book of Reports, it can be concluded that the Unit wasn't given the opportunity to verify its donation record or it did not choose to contact the Department Office to correct inaccurate information.

To ensure your donations to Department get posted correctly, fill out the appropriate Donation Transmittal Sheet and send with your donation(s) (See following samples.)

Follow the directions on the reverse side of the form for sending donations to National and other donations.

Special forms are required for paying the District Fidelity Bond, sending in donations to the In Loving Tribute Fund, California Disaster Fund, Poppy Orders, Poppy Seals, Supply Orders, Girl State Fees, President's Club and the Department President's Special Project.

## CHAPTER 7– Convention/DEC/Workshops

As District President, you are a member of the Department Executive Committee (DEC) and should familiarize yourself with your duties as a member. The DEC has general supervision over the affairs of the Department and all Department committees in the interim of annual meetings without power to modify action of previous Department Convention

- Attend Pre-Convention Executive Committee Meeting at convention.
- Attend Post Executive Committee following convention.
- Referendum vote
- Vacancies in elected Dept. Officer positions are made by the DEC within 30 days of such vacancies.
- You may or may not want to keep items concerning the Department Convention, Department Executive Committee Meeting and Workshops separate from correspondence for ready reference and ease in finding. Whatever is easiest for you is the way to go.

There are normally three Department Workshops scheduled annually (Clovis Workshop, Northern Workshop, and Southern Workshop). The Workshops are open to everyone. Members and guests are encouraged to attend to find out about upcoming promotional items and information on all programs sponsored by the American Legion Auxiliary.

- Your Unit or District may also hold a Workshop of some sort. Particularly, training sessions for new members assuming a leadership role by chairing a program or elected to serve as an officer.

### **Department Executive Committee (DEC)**

In January, the Department will hold its Department Executive Committee (DEC) Meeting, commonly called Interim Board or Mid-Year Meeting. This meeting and dates fluctuate dependent upon selection of dates and place by the Department President. This meeting is open to everyone and members and guests are encouraged to attend. The dates are set nearly a year in advance. Many times, outside activities conflict, but as the dates are predetermined, they can't be changed.

All Department Officers, Chairmen, District Presidents and certain members of the official family are "called" to this meeting. They are given mileage from the general fund for being present. Any member may attend at their own expense and is invited to purchase tickets to the Saturday evening dinner.

Prior to DEC each District Presidents will provide a written report on each Unit and will tell whether any Unit will be placed on probation, removed from probation, have their charter canceled or no action. Give your reasons. This report should be forwarded to the Department President and Department Secretary prior DEC. The District President will meet with the Department President and Department Secretary to review these reports. These meetings can be held via zoom prior to DEC. If there are any changes to these actions you must inform the Department President and Department Secretary prior to the start of the DEC.

Have you sent any Department President's pin money to Department? Please do not send pins at this time. Remember, the pins are a fundraiser for the Department and selling every pin is your goal.

All of your Units should have made their district per capita, Fidelity Bond, and ordered their poppies by this time. You will be sent a note from the Department concerning these items if incomplete. If the Units are missing these requirements, please contact them immediately. Did you send your travel expense form to Department? It is required for you to receive your travel reimbursement at DEC. You must also answer the roll call each day of sessions to receive your check. The finance Committee will disburse the checks on Sunday morning following roll call. If you have an emergency, you must notify the Department President. Let them know you will be absent from the session and tell them who will be answering for your District in your absence.

Friday is the day for the Hospital Representatives to make their report to the Veterans Affairs and Rehabilitation (VA&R) Chairman. The Department Membership Chairman will invite you and your District Membership Chairman to join them for the Membership Payoff Party on Friday evening. The Department President may invite you to attend a breakfast on Sunday or other day of their choice.

During the Saturday morning session, each District President makes any motions regarding their Units. They report on Units in trouble, Units giving up their Charter and NEW Units. The Department Chairmen give status reports on the first six months of the year, and report what they expect to achieve for the balance of the year. Any special awards are announced here. Candidates for elective office are announced and introduced. No speeches are given and no nominations at this meeting. The Western Division National Vice President generally makes their official visit to California at this time and is the honored guest during this weekend meeting.

At DEC each District President will receive a copy of Donations made by the Units. You need to ensure all information is correct:

- Donations to: What we call, "Across the Board Donations" or the donations that will be listed in the Convention Book of Reports.
  - Americanism, Children & Youth, Education, Past Presidents Parley, Gift Shop/Patient Remembrance, Veterans Affairs & Rehabilitation and totals.
- All this information will be printed in the Convention Book of Reports that every Delegate will receive at convention and you need to make sure it is correct. Units get very upset if they make a donation and it doesn't appear and is why the Department Office goes through the work and expense to send this report to you as District President, to verify before it gets printed. **IF YOU DON'T TAKE THE TIME TO DO THIS, IF IT IS INCORRECT ....YOU ONLY HAVE YOURSELF TO BLAME.**

### **Department Convention**

Prior to Convention each District President will provide a written report on each Unit and will tell whether any Unit will be placed on probation, removed from probation, have their charter canceled or no action. Give your reasons. This report should be forwarded to the Department President and Department Secretary prior to DEC. The District President will meet with the Department President and Department Secretary to

review these reports. These meetings can be held via zoom prior to DEC. If there are any changes to these actions you must inform the Department President and Department Secretary as soon as possible prior to the start of the DEC.

Did you communicate with all your Units about the donations made to date? Are the membership statistics being reported by the Department Office correct? If any Unit questions statistics, it should contact the Department Office immediately once the books are closed, it will not be possible to make changes for the Convention Book of Reports.

In April, prior to Close of Books, the Department Office will send each District President a copy of Donations made by the District and Units with the page that will appear in the Convention Book of Reports. You need to ensure all information that appears on the page is correct

- District #
- District Name
- District Goals
- District Membership
- Delegates – Delegate strength is based upon a Unit membership Department Close of Books in May. As membership increases and decreases, pay close attention to this. A Unit is authorized 2 delegates/alternates for its charter and 1 additional Delegate/Alternate per every 75 members or greater portion thereof.
- Donations to: What we call “Across the Board Donations” that are listed in the Convention Book of Reports: Americanism, Children & Youth, Education/Poppy Seals, Past Presidents Parley, Gift Shop/Patient Remembrance, Veterans Affairs & Rehabilitation and totals.
- All this information will be printed in the Convention Book of Reports that every Delegate will receive at convention and you need to make sure it is correct. Units get very upset if they make a donation and it doesn’t appear and is why the Department Office goes through the work and expense to send this report to you as District President, to verify before it gets printed.  
**IF YOU DON’T TAKE THE TIME TO DO THIS, IF IT IS INCORRECT....  
YOU ONLY HAVE YOURSELF TO BLAME, NOT THE DEPARTMENT OFFICE.**

How are your pin sales coming. Before convention, all pins and money should be sent to the Department Office.

Units attaining 100% membership by March 31 should complete the Unit Activity Report with you. Remember that these Units must show participation in the six major programs. The District President should send the best Unit supplemental report to the Department Vice President? These items are due by June 1.

For convention, have you held your District caucus meeting? Your Caucus meeting should be held not earlier than forty-five (45) days nor later than fifteen (15) days prior to the opening of the following Department Convention. Things that should be done at your Caucus meeting are:

- Elect delegates and alternates to National Convention
- Assign committee members to attend the convention Committee meetings

- Select your Color Bearers to present the flags if you are bringing them to Convention
- Elect your District Officers for the coming year per your bylaws. Make sure to pay attention to who can vote at the election meeting, and what your quorum is for a District meeting.

The District President must complete a Travel Expense form to receive your travel reimbursement at convention. You must also answer the roll call each day of session to receive your check. The Finance Committee will disburse the checks on Sunday morning following roll call. If you have an emergency, you must notify the Department President. Let them know you will be absent from the session and tell them who will be answering for your District in your absence. Only your first or second vice can take your place at Convention.

Have you notified the incoming District President that they are invited to be your guest at the Pre-Convention DEC meeting Thursday morning of convention? Do the incoming president and vice presidents know about installation on Sunday morning and the Post-Convention Meeting?

Do you remember the protocols of convention – seating within the District delegation, all District Presidents are escorted during the Opening Ceremony on Thursday, your Unit or District should make sure you have a corsage for opening ceremonies. Your personal page is to sit on the aisle in the first row of your delegation's assigned area. You should have a chair (or two) next to them. Your 1st Vice President sits next to you. Have you arranged for a sign-in sheet for your delegation? This is particularly important if delegates are reimbursed for attending the convention. More importantly, you need to know what Units are represented in your delegation at all times in case of a roll call vote.

The District President will pass roll call sheet in the AM / PM to be sure that only registered persons that can vote are in the delegation (there is a designated area for seating of Alternates and visitors).

If a Delegate must leave the hall they must notify the District President of their leaving, and if they are planning on returning, if the Delegate is not returning it is the responsibility of the District President to fill the seat. For restroom, smoking, personal – be sure someone knows. **YOUR PLACE SHOULD BE FILLED AT ALL TIMES** while the convention is in session.

Most Districts caucus some time after the Convention Committee Meetings to discuss issues coming before the convention and the Committee Meetings. These meetings should be held with all delegates and alternates to review code changes, awards, candidates, and any discussion that happened during Committee Meetings. This is your change to come up with a game plan on code changes that you may or may not agree with.

**IF A NOTE COMES TO THE DELEGATION** for a representative of your District to accept an award – be prepared to send your chairman for that program to the side of the stage as directed at the time the Chairman gives their report. If your chairman is not present the District President can appoint someone or go themselves.

If a committee is called out during convention for a special meeting the delegate who attended that committee meeting should attend the special meeting and will still have the vote of the District. As District President, any special changes on items coming to the floor should be shared with your delegation.

On Sunday the District President and Vice Presidents elect will come dressed and ready for the INSTALLATION OF OFFICERS at the close of the session. Corsages for the District President and the Vice Presidents and any Department Officers to be installed are the responsibility of the District the officer comes from.

ALL NEWLY INSTALLED DISTRICT PRESIDENTS– will be prepared to stay after the close of installation for a meeting with the NEWLY INSTALLED DEPARTMENT PRESIDENT. The vice Presidents can also sit in on this meeting for information. The NEW PRESIDENT OF THE DISTRICT should have all of their personal business taken care of before they come to the meeting on Sunday morning.

### **National Convention**

National is comprised of the 52 Departments (all states and possessions). The DEPARTMENTS are divided into groups known as Divisions. California is in the WESTERN DIVISION with Alaska, Arizona, Oregon, Washington, Idaho, Nevada, Utah, Hawaii, and New Mexico. Each Division has an elected National Divisional Vice President. This Vice President is elected at a Divisional Caucus during National Convention.

The DISTRICT chairman reports to the DEPARTMENT Chairman. The DEPARTMENT Chairman compiles their report and the summary and sends it to the WESTERN DIVISION Chairman. The WESTERN DIVISION Chairman compiles their report and it goes to the National Chairman for the report to the delegates at National Convention.

NATIONAL CONVENTION is held at various cities during the end of August each year. Any member may attend. Delegates to National Convention and Alternates elected at the state convention are the voting body for the convention. All members are welcome at all meetings of the National organization.

All members will receive a NATIONAL NEWS MAGAZINE 4 times each year. This is included in your annual membership dues. National works hard on this magazine. Make sure to read the articles and if you have members or Units that are doing good share it with the National News and maybe they will be in the magazine.

REMEMBER: This patriotic service organization is formed to protect the aims and purposes of The American Legion. As a member in a Unit, you are to pledge to cooperate with your Post, first, but the Post can't dictate policy or procedures to any Unit.

**YOU ARE A UNIT MEMBER, IN A DISTRICT, THAT IS PART OF A DEPARTMENT,  
AND IT WORKS TOGETHER TO MAKE THE NATIONAL ORGANIZATION.  
CONGRATULATIONS AND WELCOME!**

IF YOU have been elected to serve your DEPARTMENT as a Delegate or as an Alternate to NATIONAL CONVENTION, do you know what to do?

- Each Delegate and Alternate MUST REGISTER with the Department Secretary upon arrival at the Convention City. Know ahead of time what hotel (it is usually the Department American Legion Headquarters). They will be in contact with you to verify the location and time. You will pick up any tickets you have ordered at this time.
- Upon registration you will receive a packet with any tickets you ordered, your Credentials, and welcome bags. You MUST carry your Delegate card and your badge with you to all sessions. If you are an Alternate, a special section is reserved for you. Visitors are welcome to all of the sessions including committee meetings. Be sure the Department President knows where you are in case they need to “move you up” into the Delegation when a Delegate is missing.
- Committee meetings similar to Pre-Convention Committee meetings at the Department Convention and are held prior to opening of convention, most are via zoom. If you are appointed to a convention committee, you will attend the proper zoom and vote for your State.
- CALIFORNIA CAUCUS – is set by the Department President at a time after the committee meetings. Here all committee representatives report on the pending changes in rules, Bylaws, and announce awards received in committee for California. Visitors may attend this meeting if there is enough room.
- WESTERN DIVISION CAUCUS – held to elect the next years Divisional National Vice President. This office is rotated through the states in this Division. ALL CALIFORNIA DELEGATES, ALTERNATES and VISITORS are encouraged to attend this meeting. There is a head count and it is nice for the state to have all of its representatives in the room. Try to sit together. If it is not possible, be sure to stand when CALIFORNIA answers roll call.
- General sessions follow opening day according to the printed program. The day for the reading of the Bylaws changes is vital. The person elected to represent California SHOULD BE PRESENT FOR THE ENTIRE MEETING. Others are welcome to attend

**If you must leave the delegation, please advise the Department Secretary in charge of the seating. They will take care of finding your replacement. If you are not returning you will give up your credentials so that an Alternate may be “moved up” to sit in your place.**



## Chapter 8- Miscellaneous

### Mid Year and End of Year Reporting

The UNIT chairman reports to the DISTRICT chairman. The DISTRICT chairman reports to the DEPARTMENT Chairman. The DEPARTMENT Chairman compiles their report and the summary and sends it to the WESTERN DIVISION Chairman. The WESTERN DIVISION Chairman compiles their report and it goes to the National Chairman for the report to the delegates at National Convention. Please review the Department Code for due dates for Mid Year and End of Year Reports.

Unit Reports are due to District by the 2<sup>nd</sup> Friday in April  
District Reports are due to Department by May 1<sup>st</sup>  
Department Reports are due to Western Division by May 15<sup>th</sup>

### Live Units and Live Districts (ALAMIS)

Units and Districts can now sign up for a maximum of two Live Unit points of contact to access their ALA Membership Information System (ALAMIS). District access costs \$10 per year per contact. Districts can also become Live Districts and they view everything the Department views but can't make any changes. They can help Units input their Unit Leaders into ALAMIS.

The American Legion Auxiliary Management Information System (ALAMIS) is used by units, districts, and departments to manage members, and leadership information on unit, and department levels. The department headquarters authorizes who has access. Districts must contact their department with the name of the member who should have access to ALAMIS along with the member's email address, member ID, membership number, and phone number. Districts can stay informed of important reminders from National Headquarters by viewing announcements on ALAMIS.

This is a great membership tool and can be used in a variety of ways by users. To sign up, complete the [ALAMIS Request Form](#) and send it back to the Department Office along with a check earmarked Live Unit Logon Fee GF42449. Once information is sent to National, National contacts the individual points of contact and gives their logon, password and instructions normally within 2 days of request. National bills on a calendar year and not fiscal year so logon annual fees due to Department annually by September 30th.

### Supplies and Promotional Material

For information and prices of supplies available, a [Department Order Form](#) can be submitted to the Department Office or can be ordered via the [American Legion Emblem Sales](#).

Do not combine Emblem Sales orders (or payment) with orders for supplies furnished through American Legion Auxiliary National Headquarters. These are two separate entities housed in different locations.

### Privacy Protection for Unit Members

Officers and members of the American Legion Auxiliary are forbidden by National Convention resolution to distribute the names and addresses of any Units or members of the Auxiliary, except in carrying out the duties of their offices. This action was taken

at the Fourth National Convention in St. Paul, Minnesota, September 15-19, 1924. The resolution adopted by the National Convention reads: "That the Executive Committee recommended that no officer or individual of local, Department or National Organization shall circularize the Units or membership of the American Legion Auxiliary outside their immediate jurisdiction, and no committee chairman shall circularize all or any portion of the Units or membership of the American Legion Auxiliary for donations to special funds, or relative to any phase of activity without the consent of the National Executive Committee. When such authority is given, all funds and accounting shall be through the National Treasurer of the American Legion Auxiliary."

### **Discipline of Members**

A unit governing board has the authority to discipline members. Due process must be followed when disciplining a member. A disciplined member, in turn, has the right to appeal her discipline to the department governing board. When a disciplinary action is appealed to the department, the decision of the department is final. Disciplinary actions against members are not appealable to the national organization. Departments and units taking action on matters of member discipline must follow due process as provided in the American Legion Auxiliary National Bylaws and Standing Rules. Procedures for the expulsion or suspension of a member may also be found in the Unit Handbook. The requirements for member discipline and due process stated in the national Bylaws and Standing Rules supersede anything written in any other governing document.

### **Legal Opinions/Rulings**

A Counsel General has been provided to rule on all legal questions. The Counsel General is not, however, an officer of the Auxiliary, and his relationship to the National Officers is obviously in an advisory capacity. Therefore, all requests for information from and rulings by the Counsel General must come through the Department Secretary or Department President to the National Secretary, and thence referred to the Counsel General for his decision.

Requests for such information and any rulings received shall be made out in triplicate form. The applicant should retain one copy, one copy should be kept in the Department office and one copy should be forwarded to the National Secretary.

# Chapter 9- Calendar

## July - “Girls State Month”

- Review procedures left by previous District President
- Organize District Calendar
- Communicate with Units
  - Unit Meeting & Visitation Schedule
  - Encourage attendance at Department Workshop
    - Attend Workshop closest to you
- Personal Information to be forwarded to Department Office for roster.

## August

- Review major documents
  - District Bylaws, Standing Rules, Policies, Budget, etc.
- Attend Workshop closest to you
- National Convention

## September

- Orders for Convention Book of Proceedings due to Department with check NLT September annually.
- Remind Units to pay Fidelity Bond to Department
- Remind Units to Order poppies
- Remind Units to send in their Girls State Reservation forms.

## October – “Education Month”

- Poppy Orders & Girls State Reservation forms due October 1st.

## November – “Membership Month”

- Department Executive Committee (DEC) information from Department
- Early Bird Goal

## December – “Veterans Affairs and Rehabilitation Month”

- First half expense report due to Department
- Transmit any money from sale of Department President’s pins to Department.
- Prepare for DEC
  - Send travel expense form to Department
  - Make hotel and banquet reservations

## January – “Legislative/National Security Month”

- Poppy ID Cards orders due to Department NLT January 31st.
- DEC Meeting
- 100% Units by January 31st for National Award

## February – “Americanism Month”

- Membership Card Year Renewal Address due to Department NLT February 28th.

## March – “Community Service Month”

- Attend National President’s Visit
- National Awareness Assembly
- 100% Districts by March 31st for Department Certificate (plus reporting in April)

- Girls State Applications and check due to the Department Chairman by March 12th.
- Legion Birthday
- Americanism Essay winner(s) due to District Chairman by the fourth Friday in March.

#### **April – “Children & Youth Month”**

- Reservations for Junior Conference due to the Department Jr. Activities Chairman NLT April 30th.
- Make all donations to Department by April 30th
- Prepare for Convention
- Units may elect beginning April 1
- Using Department Information, Verify District Donations
- Remind Units to send Certification of Delegates/Alternates to Department
- Submit any changes to Bylaws by mid-May
- End-of-Year Report forms due from Units to District by the fourth Friday in April except the Poppy and Financial Reports which are due two days following Memorial Day.
- Past Presidents Scholarships due to the District NLT the 1st Friday in April; Districts forward winning entries to the Department Chairman NLT the 3rd Friday in April.

#### **May – “Poppy Month”**

- Recommendations affecting the program budget for next year are due by May 1st.
- Ensure all Unit obligations are paid to Department
- End-of-Year Report Forms and Poppy Financial Report are due not later than two days following Memorial Day. Copies of the Poppy Financial Report shall be sent immediately to the Department Office with check(s) and Department Chairman. District Reports are due to the Department Chairman by June 5th.
- Endorsement of Candidates
- Certification Of Unit Elections and Delegates are due to Department Office and District President immediately following election.
- Reservation for convention hotel and banquet are due.

#### **June – “Junior Activities Month”**

- Unit Activity Report due to District showing overall participation in six major programs. The District President forwards the winning entry to the Department Vice President by published deadline date.
- District Elections not earlier than forty-five days nor later than fifteen days prior to Convention Opening.
- Assign delegates to the Department Convention Committee Meetings
- Election Delegate/Alternates for National Convention. If no one is going, leave blank
- Mail Flags to Convention Site