



## DEPARTMENT OF GEORGIA FORMING A NEW UNIT

Starting a new unit requires the cooperative efforts of the post requesting to organize an auxiliary, the Department membership clerk, members of the Department Executive Committee and the Department Unit Revitalization and Development Committee. Each is necessary to bring the new unit to the point of applying for the charter and for laying a good foundation to begin functioning once the charter is approved. The members of the new unit should receive total support at each stage of becoming a vital part of the Legion Family and be assured all questions and concerns will be addressed in a timely manner. This guide includes the content and steps outlined in The National American Legion Auxiliary's document, "How to Organize a Unit in the American Legion Auxiliary" and best practices relevant to the American Legion Auxiliary Department of Georgia.

While there is an order to be followed to complete the application for the charter, more than one piece of the whole may be going on at the same time. *Timely* communication is the key and must be a priority as the process is carried out. After the Charter is approved the unit moves to Phase II which includes securing organization identity with the IRS and Georgia Secretary of State, adopting a Constitution and By-Laws and Standing Rules for the Unit in accordance with District, Department and National Documents, setting up a bank account and holding regular meetings to plan ways to carry out the Legion Family Mission.

**Phase I. (Step 1)** The Post Commander must obtain approval from the American Legion Post's general membership who must vote in favor of organizing a unit of the American Legion Auxiliary. **The unit will take the same name and number, and location of the Post** (American Legion Auxiliary \_Post Name\_ \_Post number\_ \_Post Location\_). The Commander or adjutant will be responsible for sending a letter stating the date that the Post voted to start the Unit to the Department membership clerk (may be a copy of the minutes or a signed statement) and also the contact information for the person taking on the role of the Auxiliary Unit organizer-an eligible future member who desires to see the unit form.

**(Step 2)** The Department membership clerk notifies the Department president who will obtain approval from the Department Executive Committee for establishing the new unit.

**(Step 3)** When new unit formation is approved, the Department president will appoint a Department Auxiliary Representative to work with the Post Commander/Adjutant and Unit Organizer and supply all contact information for those involved.

**(Step 4)** The Department Representative notifies Post leadership that the request is accepted and coordinates with them and the Unit Organizer to set up an informational meeting and an organizational

meeting three to four weeks apart. The Post leadership and Unit Organizer begin inviting eligible Senior members (18 and older) to the meetings. (Note: Jr members may be on the charter roll but are not included in the 10 required to submit the charter) The Department Representative ensures the Post Officers and Unit Organizer have information on eligibility of members before they invite potential members. New members fill out the Membership Application and transfers fill out the Member Data Form.

**(Step 5)** The Post Commander determines the place and officially invites all Post members to attend the information and organizational meetings. (sample letter of invitation included). The more engaged post members are, the more successful the unit. The commander will also publicize the meeting in local media, reaching out to eligible individuals who may want to be a charter member, and the unit organizer will make contacts with possible eligible members as well. It is important that the Post Commander and Adjutant understand membership eligibility as they will sign the charter affirming that all members on the charter list *are* eligible, as well as each individual application. In addition, the Department Membership clerk will send a letter to Auxiliary members in the community who are part of the Department Headquarters Unit who may want to be a part of the new unit. She will ensure the Department Auxiliary Representative has all the paperwork needed for the “New Unit Kit”.

**(Step 6) Informational meeting:** This meeting is for all members of the Post and all possible future members of the Auxiliary. The Post Commander will start the meeting and introduce the Department Auxiliary Representative who will conduct the meeting. A “New Unit Kit” will be presented to the Unit Organizer.

. Topics to be addressed are:

- What is the Auxiliary?
- Membership Eligibility –necessary documentation for deceased sponsorship
- Membership classes/Transfers/Paid up for Life
- Membership Applications (10 minimum Senior members required for a charter application)
- Dues structure to be voted on at organizational meeting.
- Officers to be elected at the organizational meeting-provide job descriptions
- Resources from National and Department. Include how to download guide books, etc. and use of Emblem Sales
- at least 30 minutes for questions, **Important as the needs of each unit will vary.**
- Announce the organizational meeting and distribute membership forms as needed. Set a deadline for charter members to turn in applications- possibly at the organizational meeting so that the membership fee can be given directly to the newly elected treasurer. Transfers may be included in the 10 members and do not need to fill out an application, but sign a Member Data Form, listing their membership number and previous unit and be approved at the organizational meeting.

**(Step 7) After this meeting:** Members of the Post and Unit organizer continue recruiting. Discuss possible time and place for the Auxiliary to meet monthly. Consider dual members of Legion and Auxiliary and other factors applicable to you. The Department Representative and Unit Organizer should communicate regularly and plan for the organizational meeting. The Unit Organizer should acquaint possible members with officer positions and encourage participation. The Organizer should discuss with the Post Commander a *temporary* process for handling monies for the unit until a bank account can be established. One way is for the Post to create an Auxiliary line in their bookkeeping, to deposit

membership dues and any other income and the Post Finance Officer writes necessary checks for the charter and any other startup expenses. Discuss sources for startup money. Some posts provide startup money to help the unit with initial expenses. Note that the Department obligations are waived for the first year, except the Bond fee which is sent in with Charter application. Any financial arrangement with the Post or anyone is ceased as soon as the Auxiliary has a bank account.

Finalize a minimum 10 senior member applications ensuring they are completely filled out and signed by the Post Commander or Adjutant. Post Officers and Unit Organizer ensure all membership applications have an active Legion member number or a separate proof of service for deceased sponsors. The Department Representative informs Department and District officers of the organizational meeting and coordinates their participation.

**(Step 8) Organizational or Formational Meeting.** Attended by any Department/District officers and Post members and all possible charter members. Chaired by the Department Representative.

--Opening protocols (Rep provides copies of the preamble and asks someone to lead prayer and pledge

--Introductions

--Appoint a temporary Secretary

--Election of Officers conducted by the Department Representative according to Department protocols for elections found in the Department Constitution, By-laws, and Standing Rules. Nominations from the floor and if more than one nominee for a position, vote is by secret ballot. The District President or highest-ranking Department officer installs officers and conducts a new member initiation.

Newly elected president assumes chair, makes a few remarks and conducts the following business:

\*Appoints non-elected officers and committee chairs as possible. Entertains a motion to approve appointees. 2<sup>nd</sup>. Discussion. Vote.

\*Entertains motions to:

\*accept transfers as charter members, if any

\*establish the Senior and Junior membership rates which include National, Department and Unit dues.

\*establish meeting time--day, week, time, location of regular Unit General Membership meetings.

\*determine the bank at which to open the Auxiliary account

\*determine the officers who will be on the bank account

\*determine who will be the Registered Agent and incorporator of the unit for the purposes of filing for a Federal EIN and Georgia Secretary of State Incorporation and requesting inclusion under National as a 501(c)19 or applying for other tax exempt status.

\*Determine if Unit will seek ALAMIS Access and at what level.

\*Determine where unit will receive mail.

\*pay \$10 for a charter roll

--Announcements-- (any post activities, next Unit meeting, etc.)

--Closing Protocols --Adjourn to Action Items

**(Step 9)** Post Commander and Post Adjutant remain after meeting to sign any membership applications not already signed/eligibility verified, as well as the Charter Application if ready.

Secretary and Department Representative ensure Application for Charter is complete through the Second Endorsement and signed by Post Officers. If not possible at this time, set a time to meet and complete it.

Treasurer collects dues—with checks payable as determined before the meeting. Keep good records, starting now. Membership Chair (possibly 2<sup>nd</sup> Vice) makes copies of all membership applications for unit files, gives original to secretary to send to Dept with other forms and checks.

President or other officers complete Member Data Form for transfers, Unit Data Form, Unit Officer Form and Unit Dues Form—all included with the Charter Application and Membership Forms that are sent to Department with checks-- 1) for total of the National and Department dues collected plus \$10 for the Charter and \$10 for the Charter roll if desired and check 2) \$10 for fidelity bond fee. Make both checks out to the ALA Dept of GA and fill for line. Send completed packet to: Membership Clerk, Department of Georgia, 3035 Mt. Zion Rd, Stockbridge, GA 30281.

**(Step 10)** The Department membership clerk will confirm the application is complete and signed by the Department president and forward it to National for approval. National will verify all paperwork and fees; create the new unit in the database (ALAMIS) and list all charter members in it; Affix seals and signatures to the Charter and return to the Department, along with new member applications and the Charter roll if requested. National will send new member cards to the unit.

**(Step 11)** The Auxiliary Representative will be available to assist the new unit and Department President in planning a charter presentation.

And then the unit is ready for Phase II-getting set up and running. The Representative will assist the Unit President in using the American Legion Auxiliary Unit Guidebook 2024, (available in pdf. format from Department website or for purchase in booklet form from Emblem Sales.) The unit officers are encouraged to consult the Auxiliary Representative as any assistance is needed. The Representative will also provide information on becoming a Legal Entity with the IRS and Secretary of State, compliance with National and Department requirements, and local permits.

Approved by DEC on \_\_\_\_\_