LEAD Training

2018 National Membership Workshop

District Commanders (Group II)

August 10-11, 2018

Presented by Nick Arnett, Membership Engagement Coordinator
LEAD Training

Leadership, Education and Development (LEAD)

Recruiting & Retention:
ATTRACT. ENGAGE. EMPOWER.
Part I – Establishing New Posts

• Building a New Post
• Post Charters

*5 min BREAK*
Training Objectives

Part II – Recruiting/Retention

• Membership Eligibility
• Membership Resources
• Post Responsibility Audit
Training Resources

- Presentation Slides Handout
- Building a Post/Post Charter Notes
- Recruiting Tips from M&PA Chairman Randy Goodman
- Post Responsibility Audit
- Post Adjutant’s Manual (not included)
Training Resources

Questions?
(regarding Objectives/Resources)
Training Style & Intent

- Present Information?
  - (some old, some new)

- Point out Resources Available

- Examine our Methods

- Generate Discussion & Group Involvement
  - (this is the primary intent)
LEAD Training

Post Operations and Membership Development

Part One
Building a New Post
How do you define a post? What makes a post a post?

- “No single project undertaken by an American Legion Post has greater importance to its future or to its relationship with its community than its decision to build or acquire an adequate activity and service center. Second only to building a new housing facility is the improvement and/or expansion of an existing building in order to serve better the needs of its membership and its community.” – Post Operations Manual 2013, page 4

- Is that right? …
  - The Members and their activities make a Post! (Not a building)

- Viability of ePosts?
- Do other VSOs use this model? (VFW, IAVA, TEAM Rubicon, RWB)
Building A New Post

Why would we need to build new posts?

• Address needs of a community w/out post
• Address needs of a community w/post(s)

Where to build new posts?

• Consider communities with a high veteran population or a population that is growing
  – Visit United States Census Bureau ([https://www.census.gov/](https://www.census.gov/))
  – Military Family Research Institute of Purdue University ([http://measuringcommunities.org/pages/home/1](http://measuringcommunities.org/pages/home/1))
  – Ask Around!
Specific Needs of the Community

• What are the needs of the community?
  – Examine demographics
  – Any schools under supported? Need for youth programs?
  – What is the college attendance rate of local HS graduates?
  – Unemployment and homeless rates?
  – Programs for Senior Citizens?

• How can we serve veterans and their families?
  – Family appreciation days? Holiday events/parades?
  – Care packages for deployed service members?
  – Family Assistance? Other programs?
Post Charters (see handout)

See handout “Building A Post // Post Charters”

Naming the Post

• Named after a person? (A living memorial)
  - Must be deceased and family’s written permission
  - Doesn’t have to be a service member (ie Otis Williams)
• Named after location?
• Can’t share same name or post number as another post (current or former… clarification?)
Post Charters

Changing Post Name?

• Send copy of minutes/resolution to Department
• Department will request the name change
• HQ will take care of it and send notification to Department
• Things to consider:
  • SAL Squadron name will also change…
  • Replacement Charter (and SAL Charter) will be reissued
Changing Location?

- Need letter from Post Adjutant/Commander
- Send to Department
- Department will request the location change;
- Letter must have both old and new locations
- HQ will take care of it and send notification to Department
Any group of eligible veterans may apply for a post charter from the national organization through department headquarters after meeting all department requirements.

A temporary charter application is to be filled out in triplicate. The instructions are included on the application, which is available from the department. National Headquarters does not require signatures from new members.

The name of the new post on the temporary charter may only be changed when an application for a permanent charter is submitted.
Permanent Charters

The organizer of the post must sign all three copies and list his or her address, unless an address has been established for the post. The organizer’s address is used for the post’s mailing address until the post has a permanent address.

- **Annual Post Data Report** – post dues amount, permanent address and dues mailing address, if different than the permanent address.

After a post has functioned with a temporary charter for a minimum of 90 days, it may apply for a permanent charter. This form and process is the same as for the temporary charter.

For more information on these procedures, contact your department headquarters.
Supplemental Charters

When? - post becomes incorporated.

… This changes the official post name,

… which is considered a new entity by the government

… invalidating the old Employer Identification Number (EIN) and requiring a new one

… new post name requires a new submission of the IRS inclusion letter to the NJA/National

… include your Articles of Incorporation (issued by state)!
Federal tax regulations require Posts to file Annual Information Return (Form 990).

TAL is tax-exempt under Section 501(c)(19) of IRS Code of 1954.

Every post must have an EIN

- submit a new SS-4
LEAD Training

Post Operations and Membership Development

Part Two
Recruiting/Retention
Membership Eligibility

What qualifies one as eligible for membership?

Criteria:

• Served within war time as declared by Congress
  – April 6, 1917 to November 11, 1918; December 7, 1941 to December 31, 1946; June 25, 1950 to January 31, 1955; February 28, 1961 to May 7, 1975; August 24, 1982 to July 31, 1984; December 20, 1989 to January 31, 1990; August 2, 1990 to current

• Must have served 1 day of federal status (Title10 vs. 32)
  – Active Duty; National Guard/Reservists qualifications
  – Basic Training, job specialty or any other active duty school

• Served Honorably (or Under Honorable Conditions)
Membership Eligibility

• **ELIGIBLE**
  – West Point or Air Force/Coast Guard/Naval Academy cadets
  – Allied Forces (all other requirements + US Citizenship at time of entry!)

• **INELIGIBLE**
  – Civil Air Patrol
  – Maritime Service
  – Naval Transport Service
What can help you find new members?

- Solicitations and advertisements
- Networking with people/entities that have veteran or service member traffic
- VA Installations?
- Community Exposure!
- *What is the #1 reason people never join?*

- myLegion.org
  - If you don’t have access… GET ACCESS! Access Granted?
Membership Resources

“Recruiting Tips from M&PA Chairman Randy Godman” Handout

Recruiting Tips from M&PA Chairman

- Who has an elevator pitch? How would you convince someone to join your post?
- Legion App (Feedback)
- Does your Dept have door hangers? Substitutes?
- Resources to keep available:
  - Application Pads! (We’ll gladly send you some)
  - Why You Should Belong pamphlets
- Expired memberships from myLegion (more on that later)
Membership Resources

Recruiting Tips form M&PA Chairman

• What are the Military installations nearby?
• Local universities? – often have student organizations
• What program is your post known for?
  – Should have at least one program that is your Post Signature!
    (No, the bar isn't good enough…)
  – Make sure your community knows it!
• Don’t be afraid to ask (regardless of demographics!)
• RETENTION! A Member you don’t lose is a member you don’t need to recruit!
  – This is probably the organizations biggest issue
  – Keep from working against yourselves
Retention tips

- Year round activity; upkeep. Programs/activities keep members coming back.
- Members need to know they are appreciated. How can you do this?
- Give members the means to show the emblem off.
- Get inactive members involved; need to contact them a couple times of year. 100% Contact! What are some reasons to contact members?
- Publish Annual report to Media
Pick your myLegion site

Members  Click Here
Available for Legion members only.

Departments  Click Here
Available for department staff only.

Posts/Districts/Counties  Click Here
Available for American Legion Posts, Districts and Counties only.

Prior to creating a Post/District/County account, an Authorization Form must be completed and submitted to National Headquarters for processing.
Post Responsibility Audit

Evaluating a Posts Performance

• How good is your post?
• What are the things your post does well?
• Where can your post improve?

Post Commanders: Don’t wait for someone to do this for you!
District Commanders: Have your posts do a self-eval!
*Take a moment to fill out the Post Responsibility Audit.
*Review “Steps to a Better Post”
Questions?