THE AMERICAN LEGION
Department of New Hampshire

Post Adjutant’s Training
Basic Course
Topics

- Duties and Responsibility
- Mission & Vision Statements
- Post Legal
- Reports / Forms
- Programs
- Manuals
- Training / Mentoring
- Department Awards Program
- National Awards Program
Post Adjutant

Comrade, You have been chosen to assist your Commander in the wise and effective administration of the office to serve not only your fellow Legionnaires but also those whose relationship to our organization has led them to look to us for guidance and relief.

You will find the duties are many, varied and at time taxing of your time.

The adjutant holds the same relative position in the post as the secretary of any other organized

The adjutant is the personnel officer, the intimate contact with the individual post member, maintains the membership records, minutes of meetings, checks up and assists the work of the other officers and committees, and publishes official orders, announcements and instructions.

Duties are mainly administrative.
Post Adjutant

- The only indispensable qualifications are honesty and willingness. The adjutant should get a set of post account books from the Emblem Sales Division, National Headquarters.

- All post records should be in the adjutant’s custody; for ready access to all sources of information, and it is to his/her interest to develop a comprehensive filing system.

- He/She should go through all the post records at the first opportunity. The constitution, minutes of meetings, and reports of officers and committees will give an insight into the post’s policies and traditions.

- Must be knowledgeable about all Legion programs and about membership.
Mission Statement

The American Legion strives to promote a better understanding of the principles of democracy and to inculcate among all people a higher appreciation of the benefits of American citizenship.

To serve the needs of all veterans and their families.

To fulfill our commitment to community, state and nation.
Vision Statement

The American Legion is the nation’s largest wartime veterans service organization founded on the values, contributions and sacrifices, of those who have answered the Nation’s call to arms, therefore we must:

- Respond to quality of life needs of all veterans and their families,
- Prepare each generation to meet its citizenship obligations,
- Maintain a strong national defense,
- Perpetuate the principles of government embodied in the United States Constitution,
- Be a values-based organization committed to serving God, country, community and every veteran today, tomorrow and throughout the 21st Century.
Post Legal
Post Legal Requirements

- Post Incorporated (Articles of Incorporation)
- Post has an EIN (section 501(c)(19) of the IRS code)
  [GEN 0925]
- Post 990 Compliance Policy
- Taxes for year submitted to IRS (Form 990)
- State Tax Exemption filed
- Officers Bonded
- Audit & Property Inventory preformed annually
- Insurance
- Licenses
Post Legal Documents

- Post Temporary Charter
- Post Permanent Charter
- Post Supplemental Charter
- Post Minutes
- Post Finance Reports / Bank Statements
- Post Membership Rosters
- Post Constitution & ByLaws
  - Department Prescribed Post Constitution & Bylaws
  - District, Division, Department and National Constitution and Bylaws
Post Tax Status 501 (c)(19)

To be exempt under Internal Revenue Code section 501(c)(19), an organization must be either:

(A) a post or organization of past or present members of the United States Armed Forces (USAF);

(B) an auxiliary unit or society of such post or organization; or

(C) a trust or foundation for such post or organization.
Post Tax Status 501 (c)(19)

It must be operated exclusively for one or more of the following purposes:

1) To promote the social welfare of the community (i.e., to promote the common good and general welfare of the people of the community); To assist disabled and needy war veterans and members of the USAF and their dependents, and the widows and orphans of deceased veterans;

2) To provide entertainment, care, and assistance to hospitalized veterans or members of the USAF;

3) To carry on programs to perpetuate the memory of deceased veterans and members of the USAF and to comfort their survivors.
Post Tax Requirements

Tax exempt organizations that normally has gross receipts of $50,000 or less **MUST** file form 990-N, Electronic Notice.

The Pension Protection Act requires the IRS to revoke the tax-exempt status of any organization that fails to meet its annual filing requirements for three consecutive years.

Must comply with the Public Disclosure requirements – www.guidestar.org
Post Tax Requirements

- Conflict of Interest Policy – Annual Disclosure
- Whistle Blower Protection Policy
- Written Document Retention/Destruction Policy
- IRS Authority to Request Information - Public Disclosure Policy

990 Compliance Policy
  - Review of Form 990 by Governing Body
  - A copy of 990 must be provided to each voting member prior to filling
  - Describe review process
Tax Publications

- Pub 3386 Tax Guide for Veterans’ Organizations
- Pub 15 Employer’s Tax Guide (Circular E)
- Pub 15A Employer's Supplemental Tax Guide
- Pub 510 Excise Taxes
- Pub 526 Charitable Contributions
- Pub 531 Reporting Tip Income
- Pub 535 Business Expenses
- Pub 557 Tax-Exempt Status for your organization
- Pub 578 Tax Information Foundations
- Pub 598 Tax on Unrelated Business Income of Exempt Organizations
- Pub 3079 Gaming Publication for Tax-Exempt Organizations
Post Minutes

- An accurate record of the business that is transacted during the meeting.
- After your minutes are transcribed, ensure you and the commander sign the document to make it a document of record.
- The Post Minutes are permanent records and must be filed and kept forever and must be made available to anyone who wants to see them, as well as the finance reports.
- The minutes must reflect:
  - Date, time and location of the meeting
  - Roll Call
  - Reports
  - Unfinished Business
  - Election information
  - New Business
  - All Expenditures of Post Funds must be approved and reflected.
Post Finance Reports

A monthly written finance report must be given by the finance officer. (attached to minutes)

Reports
- Check register
- Income/Expense Statement
- Balance Sheet to reflect Assets (CD’s) and Liabilities

Maintained for 10 years after audit and IRS filing.

Sons of The American Legion and American Legion Riders monies MUST be reported to the Post monthly and included in the Post audit and 990.
Reports

- Post Data Forms
- Consolidated Post Report!!!
- Membership Transmittals
- Post Constitution & By-Laws
- Post Minutes
- Post Finance Reports & Statements
Post Data Form

- Mailed to Posts each year
- Post’s mailing address, dues and information
- Due by April 15th
ANNUAL POST DATA REPORT
2013 Membership Year

TX - AMERICAN LEGION POST 0345 (48034500) District Data as of 2/1/2012

Post’s Legal Name (as shown on Post Charter): HEADQUARTERS

Post Location (as shown on Post Charter): AUSTIN

Current Post Commander: UNKNOWN

Current Post Adjutant: UNKNOWN

(Contact your Department Headquarters immediately if any of the information above is incorrect.)

Please type or print in ink and forward to the Department by April 15, 2012

CURRENTLY ON FILE:
1) Post’s Home (Physical) Address:
   UNKNOWN

2) Post’s Mailing Address:
   PO BOX 140527
   AUSTIN TX 78714-0527

CHANGE OR CORRECTION:
3) Post’s Dues Mailing Address:

AMERICAN LEGION POST 0345
PO BOX 140527
AUSTIN TX 78714-0527

Note: If the above address contains a member’s name or is being sent to a member’s home address as the contact, please provide the member’s ID#.

4) Current Annual Post Dues $35.00

2013 Dues will be $[ ] [ ] [ ]
Effective Date [ ] / [ ] / [ ]

5) Post’s Telephone Number: 512-472-4138

6) Post’s Fax Number: 512-472-0603

Note: Please DO NOT use personal phone numbers of members.

7) Post’s Email Address:
txlegion@txlegion.org

8) Post’s Internet Website:
www.txlegion.org

9) Post’s Meeting Date & Time:

Post Adjutant or Commander Signature ___________________________ Date ___________
Consolidated Post Report

- Shows what we do!
- Can be submitted by hard copy or Electronically
- Due by April 30th
# CONSOLIDATED POST REPORT

**THE AMERICAN LEGION**

## 2011 - 2012

### Department of: [ ]

### Post No.: [ ]

### District No.: [ ]

### Final 2011 Membership: [ ]

### City: [ ]

### State: [ ]

### VETERANS AFFAIRS AND REHABILITATION

7. no. of cases handled by service officer(s)

8. $______ emergency aid given to veterans from post funds

9. no. of volunteer hours recorded at VA hospitals

10. $______ contributions to **VA Voluntary Service** program

11. has a **VA Voluntary Service** coordinator

12. no. of **VA Voluntary Service** volunteers

13. has "Heroes to Hometowns" representative

### NATIONAL SECURITY

14. Blood Donor program - no. of pints donated

15. no. of blood donors

16. ROTC medals - no. presented by post

17. Energy - has a chairperson

18. Crime Prevention/Law and Order - has a program

19. Fire Prevention/Protection - has a program

20. Homeland Sec/Disaster Relief & Citizen Corps - participates

21. has a POW/MIA chairperson

22. has a **Foreign Relations** chairperson

### PUBLIC RELATIONS

23. has an active PR chairperson/officer

24. produces a post publication

25. maintains a website

26. no. of annual community events post participates

27. participated in a 9/11 Community Commemoration event

28. radio

29. TV

30. cable access TV

31. newspaper (stories)

32. newspaper (letters to the editor)

**no. of times your post was mentioned in the following media during the past year:**

### CEREMONIAL FUNERAL HONORS FOR VETERANS - POST SPONSORS:

33. color guard

34. firing squad

35. no. of funeral honors provided for veterans

36. $______ expenses
<table>
<thead>
<tr>
<th>ECONOMIC</th>
<th>AMERICANISM</th>
</tr>
</thead>
<tbody>
<tr>
<td>37 □ has employment chairperson</td>
<td>38 □ has <strong>Homeless Veterans</strong> chairperson</td>
</tr>
<tr>
<td>39 □ participates in career fairs</td>
<td>40 □ no. of veterans referred to LVER or DVOP</td>
</tr>
<tr>
<td>41 □ no. placed in employment</td>
<td>42 □ no. placed in job training program</td>
</tr>
<tr>
<td>43 □ promotes programs such as Employ Older Worker week and Employer of the Year</td>
<td>44 □ <strong>Homeless Veterans Outreach</strong></td>
</tr>
<tr>
<td><strong>Submitted award nominations for the following:</strong></td>
<td>46 □ <strong>Employer of Older Workers</strong></td>
</tr>
<tr>
<td>45 □ Employer of the disabled</td>
<td>48 □ <strong>Disabled Veterans’ Outreach Program (DVOP)</strong></td>
</tr>
<tr>
<td>47 □ Local Veteran’s Employment Representative (LVER)</td>
<td>50 □ Employer of veterans, large category/+200 employees</td>
</tr>
<tr>
<td>49 □ local office</td>
<td>52 □ Employer of veterans, small category/less than 50 emp</td>
</tr>
<tr>
<td>51 □ Employer of veterans, med category/50-200 employees</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>AMERICANISM</strong></th>
<th><strong>Post Participation:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>53 □ Boys State: no. of boys sponsored</td>
<td>80 □ <strong>Get Out The Vote</strong></td>
</tr>
<tr>
<td>55 $ American Legion Legacy Scholarship: amt donated</td>
<td>82 □ <strong>Memorial Day</strong></td>
</tr>
<tr>
<td>57 □ Baseball: American Legion Baseball team sponsored</td>
<td>84 □ <strong>American Legion Birthday</strong></td>
</tr>
<tr>
<td>59 □ other athletic teams sponsored</td>
<td>86 □ <strong>Community Service:</strong> Estimated no. of hours of service</td>
</tr>
<tr>
<td>61 □ Scouting: sponsors scout unit(s)</td>
<td>88 □ <strong>Jr Shooting Sports Prog Club:</strong> no. of youth involved</td>
</tr>
<tr>
<td>63 $ donated to scouting activities</td>
<td>90 □ <strong>Jr Law Cadet:</strong> no. of youth involved</td>
</tr>
<tr>
<td>65 □ no. of local contestants</td>
<td></td>
</tr>
<tr>
<td>67 □ Education: participates in School Award program</td>
<td>81 □ <strong>Veterans Day</strong></td>
</tr>
<tr>
<td>69 □ participates in American Education Week</td>
<td>83 □ <strong>July 4th</strong></td>
</tr>
<tr>
<td>71 $ cost of schools assisted</td>
<td>85 □ Four Chaplains Sunday</td>
</tr>
<tr>
<td>73 $ cost of scholarship awards</td>
<td>87 □ cost to post</td>
</tr>
<tr>
<td>75 $ additional amounts expended on Education Program</td>
<td>89 □ cost to post</td>
</tr>
<tr>
<td>77 □ <strong>Flag Education:</strong> no. of presentations to local groups</td>
<td></td>
</tr>
</tbody>
</table>
### CHILDREN & YOUTH

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>91</td>
<td>no. of C&amp;Y activities held</td>
<td>$_____</td>
</tr>
<tr>
<td>93</td>
<td>value of goods given to children (reasonable estimate)</td>
<td>$_____</td>
</tr>
</tbody>
</table>

**Post participation:**

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>96</td>
<td>Health &amp; Child Safety</td>
<td>[]</td>
</tr>
<tr>
<td>98</td>
<td>April is C&amp;Y Month</td>
<td>[]</td>
</tr>
<tr>
<td>100</td>
<td>Special Olympics</td>
<td>[]</td>
</tr>
<tr>
<td>102</td>
<td>parties, dinners, prizes and gifts</td>
<td>$_____</td>
</tr>
</tbody>
</table>

**Contributions - dollar amounts to other agencies or American Legion activities:**

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>105</td>
<td>Family Support Network</td>
<td>$_____</td>
</tr>
<tr>
<td>107</td>
<td>American Legion Endowment Fund</td>
<td>$_____</td>
</tr>
<tr>
<td>109</td>
<td>Special Olympics</td>
<td>$_____</td>
</tr>
<tr>
<td>104</td>
<td>Children's Organ Transplant Association</td>
<td>$_____</td>
</tr>
<tr>
<td>106</td>
<td>Temporary Financial Assistance</td>
<td>$_____</td>
</tr>
<tr>
<td>108</td>
<td>Children's Miracle Network Hospital</td>
<td>$_____</td>
</tr>
<tr>
<td>110</td>
<td>all other child service charities</td>
<td>$_____</td>
</tr>
</tbody>
</table>

### INTERNAL AFFAIRS

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>111</td>
<td>American Legion Riders: has Riders group</td>
<td>[]</td>
</tr>
<tr>
<td>113</td>
<td>no. of community events supported by Riders group</td>
<td>$_____</td>
</tr>
<tr>
<td>115</td>
<td>Support Our Troops - cost to post</td>
<td>$_____</td>
</tr>
<tr>
<td>117</td>
<td>no. of volunteers for Support Our Troops</td>
<td>$_____</td>
</tr>
<tr>
<td>112</td>
<td>no. of Legion family members in Riders group</td>
<td>$_____</td>
</tr>
<tr>
<td>114</td>
<td>National Emergency Fund - amount donated</td>
<td>$_____</td>
</tr>
<tr>
<td>116</td>
<td>no. of volunteer hours for Support Our Troops</td>
<td>$_____</td>
</tr>
<tr>
<td>118</td>
<td>all other fund raising not captured above</td>
<td>$_____</td>
</tr>
</tbody>
</table>

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**Signature**

**Title**

**Date**

2011-2012  
NATIONAL HEADQUARTERS COPY
Use of the Name or Emblem

The name & emblem of The American Legion, SAL, Riders and Auxiliary are registered trade marks.

By authority of May 1947 Resolution Number 71, “may grant limited permission to use the name and emblem”.

A request to obtain permission for limited use of the name or emblem must be submitted to the Department Adjutant.

Please note that permission must be requested by the member or Post/District/Division.

Permission given will be granted on a one-time basis.

Additional orders will require new authority.
Request for use of American Legion Name or Emblem on Merchandise

The name and emblem of The American Legion are registered service marks in the U.S. Trademark Office and are protected by criminal and civil enforcement provisions of federal law (15 U.S.C.S. 786 and 36 U.S.C.S. 44 and 48). By authority of May 1947 Resolution Number 71, the National Adjutant or his designated representative Director, National Emblem Sales, may grant limited permission to use the name and emblem in accordance with Resolution Number 71, other Resolutions and U.S. Trademark Law. In order to gain permission for limited use of the name or emblem, complete enclosed form and forward to the Department Adjutant. The Department Adjutant will forward completed form to National Emblem Sales. Please note that permission must be requested by the member or Post purchasing the merchandise and permission is granted directly to U.S. Manufacturers only.

Any permission given will be granted on a one-time basis for a given quantity. Additional orders will require new authority and the manufacturer may not produce more items than had been ordered. Permission will be granted with the caveat that all material used will specifically identify the Post. If the merchandise purchased is available through National Emblem Sales, you will receive a quote for the merchandise or a one-time limited permission. If the merchandise is not available through National Emblem Sales, you will receive a one-time limited permission or denial of permission. If you are ordering an outdoor sign for your Post, the only licensed manufacturer of American Legion Post outdoor signs is the J.M. Stewart Co., 2201 Canta Court, Suites 217-218, Sarasota, FL 34232 and they can be reached at (800) 237-392

Fill out form completely and fax or mail to Department Headquarters

<table>
<thead>
<tr>
<th>Purchaser Information</th>
<th>Manufacturer Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Post Number:</strong></td>
<td><strong>Name of Business:</strong></td>
</tr>
<tr>
<td><strong>Address:</strong></td>
<td><strong>Address:</strong></td>
</tr>
<tr>
<td><strong>Members ID #:</strong></td>
<td><strong>Contact Person:</strong></td>
</tr>
<tr>
<td><strong>Telephone #:</strong></td>
<td><strong>Telephone #:</strong></td>
</tr>
<tr>
<td><strong>Evening</strong></td>
<td><strong>Product in all parts made in U.S.A.?</strong></td>
</tr>
<tr>
<td></td>
<td>Yes ___ No ___</td>
</tr>
<tr>
<td><strong>Product Description:</strong></td>
<td><strong>If No, please attach explanation.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Quantity:</strong></td>
<td><strong>Imprint instruction. Provide rough sketch or attach artwork.</strong></td>
</tr>
<tr>
<td><strong>Price:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Purpose/Use of product:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Signature</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>DEPARTMENT USE</strong></th>
<th><strong>FOR OFFICE USE ONLY</strong></th>
<th><strong>NATIONAL USE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>( ) Recommend Approval</td>
<td>( ) Approved</td>
<td>National Adjutant or Designated Rep. (Nat. Emblem Sales)</td>
</tr>
<tr>
<td>( ) Recommend Denial</td>
<td>( ) Referred</td>
<td></td>
</tr>
<tr>
<td>Department Adjutant</td>
<td>( ) Denied</td>
<td></td>
</tr>
</tbody>
</table>
Other Forms

- Application for Dept Color Guard Contest
- Application for EMT, Firefighter & Law Enforcement Officer of the Year
- Award – Outstanding Post Adjutant
- Assorted Scholarships
- Gold & Silver Brigade Awards
- Recruiter of the Year Award
- Membership Awards
- VA Volunteer Award
Programs
The Four Pillars of the American Legion
Four Pillars of The American Legion

VETERANS AFFAIRS & REHABILITATION
- Benefits Center
- Heroes to Hometowns
- Homelessness
- GI Bill
- Department Service Officers
- Veterans Career Center
- Volunteering
- Women Veterans

AMERICANISM
- American Legion Baseball
- Boys Nation / Boys State
- Flag Advocacy
- Citizenship
- Education
- Flag etiquette
- Get Out the Vote

NATIONAL SECURITY & FOREIGN RELATIONS
- Family Support Network
- National Security & Foreign Relations
- Operation Comfort Warriors
- POW/MIA advocacy
- Temporary Financial Assistance
- Troop Support

CHILDREN & YOUTH
- American Legion Baseball
- Boys Nation / Boys State
- Child Welfare Foundation
- Junior ROTC / ROTC
- Junior Shooting Sports
- Oratorical Contest
- Scholarships
- Scouting

COMMUNITY SERVICE
- American Legion Auxiliary
- Legion Riders
- Family Support Network
- National Emergency Fund
- Sons of The American Legion
- Legiontown USA
- Temporary Financial Assistance
Pillar I – Veterans Affairs & Rehabilitation

Since our inception, TAL has assisted veterans in:

- Readjusting to civilian life
- Receiving VA benefits
- Improving access to health care
- Maintaining dignity and self-respect
- Assuring the well-being of spouses and children
VA& R Programs

- Heroes to Hometown (H2H)
- Veterans Affairs Voluntary Service (VAVS) Program
- Department & Post Service Officers
- Veterans Employment and Training services
- Homeless Veterans Programs
Heroes to Hometown

Heroes to Hometown (H2H) is a transition assistance program for severely injured service members returning home from OEF/OIF.

Goal:
- Restore highest functioning quality of life
- Assist in meeting long-term needs
- Educate the community
- Ease the transition home

“When They Come Home” is a Post to assist service members when they return home.
Pillar II - National Security

- Strong National Defense
- Homeland Security
- Foreign Relations
- Military Quality of Life
- Full accounting of POW/MIA's
National Security Programs

- Junior Law Cadet Program
- ROTC Recognition Program
- Law Enforcement Officer of the Year Award
- EMT of the Year
- Fire Fighter of the Year
- Blood Donor Awards
Troop Support

As the war on Terrorism continues, the number of Active, National Guard and Reserve units deployed will continue to rise.

Through the Troop Support Service (TS2) The American Legion is there to assist.
“Americanism – what a vast significance that term implies. It embraces every phase of an individual’s reaction to the community, state and nations in its larger conception.

Americanism begins in the home – when one understands and appreciates and shows a willingness to preserve the ideals and traditions of American home life at his own fireside will he fully discharge his obligations as a citizen.
Pillar III - Americanism

- Devotion to law and order
- Raising a wholesome youth
- Respectful observance of patriotic holidays and remembrances
- Education
- Law-abiding citizenship
Americanism Programs

- Boys State & Boys Nation
- American Legion Baseball
- High School Oratorical Scholarship
- Flag Education Programs
- Scholarship Information & “Need a Lift?” booklet
- Junior Shooting Sports
- Community Service / Education
- School Awards Program
- Scouting
- Sons of The American Legion
Pillar IV – Children & Youth

- To strengthen the family unit
- To support quality organizations that provide services for children and youth
- To provide communities with well-rounded programs that meet the physical, educational and spiritual needs of young people
Children & Youth Programs

- Child Welfare Foundation
- Halloween Safety
- Safety Tips for Indoor/Outdoor Awareness
- National Family Week
- Juvenile Delinquency Prevention
- Warning Signs - Youth Suicide Prevention
- Parents: For Your Information
- April is Children & Youth Month
- Crime Prevention Program
- Fire Protection/Prevention Program
- Family Support Network
- Guide for Parents & Students
- Children’s Miracle Network
Community Service

Is the Foundation that the Four Pillars to stand on.
Community Service Programs

- Legionnaires/Posts being active in the Programs
- American Legion Auxiliary
- Sons of The American Legion
- American Legion Riders
- American Legacy Scholarship
- The American Legion Legacy Run
- Legiontown
Sons of The American Legion

- The SAL is a program of The American Legion and as such is under the complete control of the Post.
- Male descendants
- The Post SAL Liaison should attend all SAL and Post meetings to share information.
- The Sons are a great resource for the Post.
American Legion Riders

- The American Legion Riders are in keeping with the aims and purposes of the American Legion.
- To promote motorcycle safety programs and provide a social atmosphere for American Legion Members who share the same interest.
- The ALR is a program of The American Legion and as such is under the complete control of the Post.
- Must be a member of the Legion, Auxiliary or SAL.
Legiontown

Legiontown is our Town, it’s America’s Town

- American Legion Day – Sept 16th
- Your Post is the heart of Legiontown
- Service to Youth, Veterans, Troops & Community.
Family Support

- Aid for active duty military
- Hotline #: 1-800-504-4098
- Department contact local post
- Local post contacts family
- Refer to TFA program also
National Emergency Fund (NEF)

- The NEF is used to meet the most urgent needs of our members stricken by natural disasters.
National Emergency Fund (NEF)

Eligibility Criteria

- Open to Legionnaires and SAL members (up to $1,500) and Legion posts (up to $5,000).
- Not meant to replace or repair items, only to meet most immediate needs (i.e., temporary housing, food, water, clothing, diapers, etc.).
- Does not cover insurance compensation or monetary losses from a business, structures on your property (barns, tool sheds, etc.), equipment or vehicles.
- Membership must be current at time of disaster and the time of application.
National Emergency Fund (NEF)

How to apply

- Application must be received within 90 days of the disaster.
- Disaster must be a “declared” natural disaster.
- Supporting data (photos, repair estimates, receipts for lodging, food, expenses for being temporary displaced, etc.) should be included if at all possible or statements (testimony) from post/district/department officers attesting to damages.
- Only one grant per household.
- Post grants must derive from a declared natural disaster and substantiating documentation must provide that The American Legion Post will cease to perform the duties and activities in the community due to losses sustained.
- Application is properly completed by applicant then sent to the department headquarters for approval.
- If everything is in order, department will forward to National. Upon approval at the National level, a check will be sent to the Department Headquarters for delivery.
National Emergency Fund (NEF)

How you can help?

Send your tax-deductible contributions to:
The American Legion
National Emergency Fund
P. O. BOX 6141
Indianapolis, Indiana 46206

All contributions made to this fund are deposited in a special account and are used exclusively to meet our members’ most urgent needs. Not one single contribution dollar is used for fundraising, administrative costs or fulfillment.
Temporary Financial Assistance (TFA)
Temporary Financial Assistance

- Provides non-repayable grants to children of veterans to cover shelter, utilities, food and clothing
- There must be minor child/children in the home
- Must be the biological child of veteran or have legal custody
- Veteran must have served honorably during the one of the eligibility periods. (Not necessary to be member of American Legion to receive assistance).
- Does Not Cover – cable bill, car insurance, car payments, taxes, transportation, previous debt or any expense that does not contribute to the basic needs of the minor child/children.
Temporary Financial Assistance

Local Post or District Conducts Investigation

Complete TFA Application / supporting documents

- DD214 or other proof of active duty discharge type
- Birth Certificates of children or SSN cards
- Custody documentation and legal name changes
- All current statements, bills, leases, foreclosures, eviction notices, disconnection notices.

- Make sure all signatures required are obtained.

Mail Complete form and supporting documents to Department Headquarters
TEMPORARY FINANCIAL ASSISTANCE APPLICATION
THE AMERICAN LEGION
AMERICANISM AND CHILDREN & YOUTH DIVISION

American Legion Department of

Please print legibly or type. Instructions located on page 4 of this application.

VETERAN

Full Name □ Father □ Mother □ Other

Social Security No. Date of Birth

Street Address Phone

City State Zip

Active Duty Dates Characterization of Discharge

Official documentation (DD214, VA, order, etc.) that proves honorable service during an eligible period must accompany this application.

Employment Status □ Full time □ Part-time □ Laid-off □ Worker's Compensation □ Unpaid Leave □ Not Employed

If not employed, the investigation report must explain why and what steps are being taken to secure employment.

OTHER PARENT or GUARDIAN

Full Name □ Father □ Mother □ Other

Social Security No. Date of Birth

Street Address Phone

City State Zip

Employment Status □ Fulltime □ Part-time □ Laid-off □ Worker's Compensation □ Unpaid Leave □ Not Employed

If not employed, the investigation report must explain why and what steps are being taken to secure employment.

CHILDREN

Full Name Age Grade

Full Name Age Grade

Full Name Age Grade

Full Name Age Grade

List additional children on a separate sheet.

Are both parents living in the home? □ Yes □ No

If applicable, which parent is absent? □ Father □ Mother □ Other

Reason □ Deceased □ Deployed □ Divorced □ Separated □ Other

Does the child or children reside in the home full-time? □ Yes □ No

Who has legal custody of the minor child or children?

Attach supporting custody documentation if applicable.

TFA Form #015 Revised January 2003
## OTHER ASSISTANCE

In order to be considered for a Temporary Financial Assistance grant, all other forms of possible assistance must be applied for and exhausted. Failure to completely document this in the following section will result in delay or denial of the application.

<table>
<thead>
<tr>
<th>Source</th>
<th>Date Applied</th>
<th>Status</th>
<th>Amount approved or explanation of ineligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post, Unit, or Squadron</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Assistance for Nasty Families</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>VA Disability Pension</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Social Security Disability</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Supplemental Security Income</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Medicaid</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Public Assistance</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Unemployment</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Private Charities</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Food Stamps</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Women, Infants, &amp; Children WIC</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>□ Approved □ Denied □ Pending □ Not Eligible</td>
<td></td>
</tr>
</tbody>
</table>

## CREDITOR INFORMATION

Most approved checks will be two-party, made payable to the veteran or guardian and the creditor. Please ensure that creditor information is accurate and the name is legible. Only listed creditors in this section will be considered for payment.

Mortgage or Landlord ____________________ Phone __________

Street Address __________________________

City __________________ State _____ Zip ______

Utility Company/Other __________________ Phone __________

Utility Company/Other __________________ Phone __________

Utility Company/Other __________________ Phone __________

Utility Company/Other __________________ Phone __________

Utility Company/Other __________________ Phone __________

Attach current statements, bills, disconnection/eviction notices, and all other expenses to be considered.
FINANCIAL INFORMATION
Include only recurring monthly gross income and expenses. Do not include one-time assistance or accumulative balances on past due expenses. Gross income must include earnings of all persons in the household.

<table>
<thead>
<tr>
<th>Monthly Gross Income</th>
<th>Monthly Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earnings of Veteran/Guardian</td>
<td>Shelter</td>
</tr>
<tr>
<td>Earnings of other Parent</td>
<td>Electricity</td>
</tr>
<tr>
<td>Earnings of others</td>
<td>Gas</td>
</tr>
<tr>
<td>VA Pension</td>
<td>Water/sewage</td>
</tr>
<tr>
<td>Social Security</td>
<td>Food</td>
</tr>
<tr>
<td>Child Support</td>
<td>Automobile</td>
</tr>
<tr>
<td>Other monthly income</td>
<td>Clothing</td>
</tr>
<tr>
<td>Total Gross Monthly Income</td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td>Specify</td>
</tr>
<tr>
<td></td>
<td>Total Expenses</td>
</tr>
</tbody>
</table>

INVESTIGATOR’S REPORT
The investigation must include a detailed description of the applicant’s situation, steps taken to improve the situation, and follow-up plans of the Post and/or investigator. Incomplete investigation reports will result in delay or denial of the application.

Attach additional sheet(s) as needed.

SIGNATURES
Investigator
I certify that I conducted the above investigation and that the applicant has exhausted all other forms of known assistance.

Name & Title: ___________________________ Phone: ___________________________
Street Address: ___________________________
Signature: ___________________________ Date: ___________________________

Applicant
I, the applicant, certify that the information contained in this application is true and current to the best of my knowledge.

Signature: ___________________________ Date: ___________________________

Department Children & Youth Chairman or Authorized Department Official
I have thoroughly reviewed this application and recommend the following: □ Approval $ ____________ □ Denial

Comments: ___________________________

Signature: ___________________________ Date: ___________________________

TFA Form Rev. 2008

Page 3
Post Adjutant Manuals

- Post Adjutant’s Manual
- Officer’s Guide and Manual of Ceremonies
- Post Administrative Manual
- Post Operations Manual
- Post Membership Team Guide
- Public Relations Guide
- Post Service Officers Guide
Post Adjutant’s Manual

- Post Adjutant’s bible
- 11 sections
  - Post Charters
  - Reports
  - Membership
  - Mylegion.org
  - NEF
  - ALEI
  - Resolutions
  - Post Service Officers
  - Funeral Honors
  - AL Magazine & Dispatch
  - Military Awards, Decorations & Records
Officer’s Guide & Manual of Ceremonies

- Newly revised now only has two sections
- Section 1 – Post Operations
- Section 2 – Manual of Ceremonies
Post Administrative Manual

- Produced and distributed by Department
- Standardize the Department as a whole
- Make the Post Adjutant’s job a little easier

- Section I - Month to Month Report list
- Section II – Membership Information
- Section III – General Information
- Section IV - Forms

All forms can be found on the Department Website on the forms page.
Post Operations Manual

Guide on how to operate Post.
Guide on how to set up a membership team and provides information on recruiting and retention.
Public Relations Handbook/Toolkit

- Guide to setting up a Post Public Relations Program
- How to do press releases for events.
- Download from www.legion.org
Post Service Officers Guide

Guide for Post Service Officers on how to assist veterans.
Training & Mentoring
Why is Training/Mentoring Important?

- Department Bylaws – Article II Duties of Officers
- Part of the Department Strategic Plan
  - Establish a Leadership program for future leaders that will result in an upward trend in our membership growth.
- Sustained membership growth demands a knowledgeable leadership.
What is the Vision & Goals of the Training Committee?

- **Vision:** “provide members with the skills necessary to be competent, trained and proactive in all of The American Legion endeavors.”

- **Goal:** Develop a list of trainers & mentors in each Division and District.

- **Goal:** Drive the training initiative down to the Post level.
What do we need?

- The Command Structure
  - Department Officers, Committee & Commission Members
  - District Commanders
  - Post Commanders

  To lead, encourage and follow up within their respective areas of support the training/mentoring initiative.

- You to sign up to be trainer and/or mentor in an area where you feel comfortable in helping.
Training Programs

- American Legion Extension Institute
- LEADS Training
- Department, Division and District Training Events/Programs.

National Legion College

- Panama, Grenada, Gulf War vet
- Member at least two years in the Legion
- Demonstrated leadership potential
- Be selected by Department selection committee
- Department pays $600.00 fee, National picks-up the rest
- Must commit to being a Department Trainer
American Legion Extension Institute

Course Introduction

Welcome to The American Legion Extension Institute online training program!
We are pleased to now offer this time-honored training experience in a new and convenient format. Click NEXT to become familiar with the course navigation.

Welcome back!
You may continue from the last course page you viewed.
Certificate of Completion

This certificate certifies that

BILL WEST

has completed the required training and has passed the final exam of The American Legion Extension Institute on
March 11th, 2012.
Post Training Guide

Guide for Post to set up their own training events.
Awards
Overview

- Department Awards
- Americanism Awards
- Community Service Awards
- Membership Awards
- Public Relations Awards
- Law and Order Awards
- National Economic Awards
- Veterans Affairs and Rehabilitation Awards
Department Awards

- Adjutant of the Year Award
- Color Guard Contest
Americanism Awards

- Thomas J. McLin Americanism Trophy
- Eagle Scout of the Year
- Royal E. Miller, Jr., High School Oratorical Contest Award
- Louis E. Willett High School Oratorical Contest Award
- Baseball
- Boys State
Community Service Awards

- Community Service Award No. 1
- Oscar P. Cole Community Service Award No. 2
Public Relations Media Awards

- Department Publicity Award
- Maurice L. McQuillen Publicity Award
Law and Order Awards

- Law Enforcement Officer of the Year
- Firefighter of the Year
History Awards

- The Herberta Stark Memorial History Yearbook Award
- The Charles H. (Pat) Devine memorial Trophy
VA&R Awards

- Department Service Award
- Albert E. Nadeau Trophy
- Citation of Meritorious Service
- Certificate of Appreciation to Outstanding VA Officials.
Membership Awards
Individual Membership Awards

- National Commander Membership Award
- Gold Brigade Award
- Gold Brigade Fifth Consecutive Year
- Gold Brigade Six or More Consecutive Year
- Silver Brigade Award
- Department Recruiter of the Year Award
- National Recruiter of the Year Award
- Pioneer Award
- Post Revitalization Recognition Award
Post Membership Awards

- Post 100% Award
- Post Membership Excellence Award
- American Legion Retention Award
Post Membership Awards

- Department All-Time High Award
- National Post Honor Ribbon
- Certificate of Meritorious Service All-Time High Award
- Five or More Year Consecutive All-Time High Award
District Membership Awards

**National Level**

- District Commanders “Race to the Top” Competition
- District Commander’s New Post Achievement Award
- District Commander Achievement Award and District Honor Ribbon
- 100% District Commanders Pin
- District Commanders Post Visitation Award
Department Membership Awards

Department Vice Commander Goal Award
National Membership Awards

- National Convention Housing Cutoff
- Parade Position and Convention Hall Seating
- Department Commander of the Year
- Department Commander “All-Time High” Award
- Department Honor Ribbon
Post Excellence Award

To qualify for the Post Excellence Award, a post is required to achieve excellence in four areas: membership, youth activities, community service, and support to currently serving troops or veterans.

The purposes of this award are membership growth, exposure of American Legion values to the youth of the community, and increased visibility of the American Legion family through service projects.
Post Excellence Award

Criteria: The standard to be achieved in each of the areas is:

Membership – Post membership must be at least one member more than the previous year. A Post Officer must attend a District Meeting.

Youth Activities – the Post must sponsor and actively participate in at least one of the primary youth programs; Boys State, Legion Baseball, the Oratorical Contest, Boys Scouts of America or Junior Shooting Sports.
Post Excellence Award

Community Service – The Post must organize and accomplish a community service project that involves members of the Legion, Auxiliary and Sons of The American Legion. A monetary donation may only be one part of a project.

Service to troops/veterans – the Post must organize a project supporting troops or veterans (for example, Family Support Network or Operation Comfort Warriors), that involves members of the Legion, Auxiliary and SAL outside the Post. A monetary donation may only be one part of a project.
Post Excellence Award

- District Commanders must certify Posts as having fulfilled the four specified criteria and submit a list of Post’s name, number, address and commander’s name to Department Headquarter. Accompanied by copies of press releases submitted to local media that raised awareness for the projects and enhance the Legion’s public image.

- Each qualifying Post will receive a certificate of recognition.
QUESTIONS?