

## HOW TO ORGANIZE A NEW UNIT

The following steps are necessary in the organization of a new Unit. If you have any questions, refer them to the Department Office.

**POST AUTHORIZATION.** An Auxiliary Unit may be formed only by the authority of, and in connection with, a regularly chartered American Legion Post – by permanent charter. The Post should contact the Department Secretary/Treasurer to request the *Post Authorization for Organization of Auxiliary Unit* form. It is sent by the Department Office to the Post. The Post Officers sign, date, and forward the form to the District President for her signature. It is then forwarded to the Department Office. There is space on the form to indicate who should receive the New Unit Kit. The name and address used should be that of the Acting President of the new Unit, a woman willing to be responsible to follow through with the paperwork, or the District President.

**DISTRICT PRESIDENT.** The organization of a new Auxiliary Unit is under the supervision of the District President. She should be in constant contact with the women organizing the Unit at the local level, attend the first few meetings, and be available to answer the questions that arise concerning procedures and forms.

1. **Unit Name** The Unit must take the name, number, and location of The American Legion Post to which it is attached. This information will appear on the Legion Charter, if there is a question.

**CHARTER MEMBERS.** National requires no fewer than ten (10) Senior members. It is **suggested** by the Department of California that a new Unit have a charter membership nearing twenty (20) members, with ten (10) being new members, so that all the offices can be filled and still have members to act as chairmen. Junior members can be considered charter members, but do not count in the required number of members necessary to charter the new Unit. Seniors may be new and transferring members. **Note:** If there are fewer than ten (10) new members, the District President is advised to contact the Department President.

**CLOSING THE CHARTER.** The charter must remain open for thirty (30) days from the date the Post Commander signs the *Post Authorization for Organization of Auxiliary Unit*. All members affiliating during this time period will be considered **Charter Members**. If desired, the National Headquarters will inscribe the names of the charter members on a charter roll at a nominal charge as well as a set up fee. A typewritten list of names in the exact order desired, together with full payment must accompany the application packet returned to the Department Office.

**NEW UNIT KIT.** Once the Department Headquarters receives the *Post Authorization for Organization of Auxiliary Unit*, from the District President, a New Unit Kit is sent to the person designated on the authorization form. The kit contains the materials necessary to open a Unit. A check list is included, as well as a list of the documents returned to the Department Office for further processing. There is a vast amount of information in the kit and it will be overwhelming to a new member. It is suggested that the District President plan to meet with the member to assess the documents.

#### **WHAT THE NEW UNIT RETURNS TO THE DEPARTMENT OFFICE**

(Please return all documents in one envelope.)

New Charter Fee — \$10.00 (Payable to National ALA)

Set up Fee to Inscribe Roll (Optional)— \$20.00 plus \$1.00 per Name (Payable to National ALA)

Membership Cards — Stubs A & B (Do Not Separate)

Membership Applications for New Members

Membership Data Forms for Transferring Members

Membership Dues - (Separate Unit check payable to Department of California - \$12.00 per Senior, \$2.00 per Junior)

Membership Transmittal

Charter Application — All Three Copies Are Necessary — Make Sure First Endorsement Is Complete on the Back of Each Copy

Model Unit Bylaws (All 5)

Unit Officers Certification Form (White to Department, Green to District President)

Fidelity Bond Form and payment (Separate Check Payable to Department of California)

Unit Data Form

**INITIATION AND INSTALLATION.** These ceremonies may not take place until the Department President has signed the application for charter. In most cases, once the charter application has arrived at the Department Office, it is signed and forwarded to National Headquarters. The Department Office will notify the District President and the Unit once the application packet has been received at Department Headquarters. Do not permit the date of the ceremonies to be set until notification is received. The District President must notify the Department Office of the date of the installation. **Note:** It is a nice gesture to present the membership cards and any other items (flags, pins, etc.) during the initiation ceremony.

**NATIONAL GUIDELINES.** The first step in the organization of an Auxiliary Unit is to create interest among women in the community who are eligible for Auxiliary membership and to secure authorization for the creation of an Auxiliary Unit from the Post. Charter application forms, individual membership applications, suggested Constitution and Bylaws and any other needed supplies or information may be obtained from the Department Headquarters. Department officers are always ready to assist in installations and in providing their expertise when needed.

The Post Commander and Department Auxiliary officers should attend the organizational meeting to outline the nature and purposes of the Auxiliary. The following procedure is suggested protocol for the organizational meeting.

1. Elect a temporary chairman and secretary to preside over the organizational meeting.
2. Adopt a temporary Unit Constitution.
3. Establish dues amount sufficient to cover Unit administrative expenses plus assessment amounts due to National, Department and, on occasion, District or County.
4. The temporary chairman asks for nominations for the following officers: President, one or more Vice Presidents, Chaplain, Historian, Secretary, Treasurer, and Sergeant-at-Arms. Immediately following election the newly elected officers will assume their duties. The President should act to establish unit committees that parallel those standing committees in the National Constitution and Bylaws as soon as possible.
5. When the applicants for membership in the new Unit have completed their individual membership applications with signature from Post Adjutant (who attests eligibility), the application for the Unit charter must be completed in triplicate. The three copies of the application and charter are then forwarded to Department Headquarters.
  - o The applicants, having paid Unit, Department and National dues, will then be charter members when the charter is granted. A minimum of ten new senior members is required to form a Unit. Any number of transferred members may sign the charter application and will be designated as charter members. Junior members may be charter members, but cannot be counted toward the ten new senior members required to form a new unit.

**Note:** *Ten (10) senior members is the minimum number required to hold a charter. The sole exception is the Department Headquarters Unit, which has no minimum membership requirement.*

6. After organization, the newly elected secretary will forward to the Auxiliary Department Headquarters the following:
  - a. All three copies of the charter application all signed by the Post Commander and attested by the Post Adjutant.
  - b. The individual membership applications.
  - c. Payment due to the Department organization and National for Junior and Senior members. Senior members dues includes a subscription to the American Legion Auxiliary national magazine.
  - d. The charter fee, as designated by the Department Headquarters. The Department Secretary will then forward the necessary documents to the Auxiliary National Headquarters for processing.

When the applications and dues from the new Unit are received at the Department Headquarters, the Department Secretary will forward to the Unit Secretary the correct number of membership cards. Since the membership cards for the first year are blank cards with two stubs attached, it is necessary for the Unit Secretary to prepare a membership card for each Unit member. The cards should then be signed and distributed immediately to all paid-up members. Once the member's data has been entered into the national membership database, the member will automatically receive a pre-printed membership card the following year and the magazine. In order for a new Senior member to receive a copy of the national magazine, it is necessary for the Unit Secretary to complete the member's card stubs.

*If you have questions relative to completing the membership applications contact your Department Headquarters.*

### ***ISSUING THE UNIT CHARTER.***

The Unit charter will be issued by the National President and National Secretary upon receipt of the charter application, duly attested by the Department President, accompanied by individual membership applications and National dues. With the charter, the Unit will receive a copy of the charter application bearing the endorsement of the Department and National Officers. An inscribed membership roll, which lists the charter members, is available for a nominal fee. The charter may be presented informally or with an appropriate initiation ceremony by an American Legion official or Department or District officer of the American Legion Auxiliary. The National Constitution provides that the charter of a new Unit must be closed thirty days after it has been signed by the Post Commander, which means that only members joining within that time can be classed as charter members.

National Headquarters maintains facilities for inscribing names of charter members on charter rolls at a nominal charge per name. A typewritten list of names in the exact order desired, together with payment of the fee in full, must be forwarded by the Unit through Department Headquarters to the National Headquarters.

The National Executive Committee regarding the payment of per capita tax and the issuance of charters took the following action: By action of the 1975 National Executive Committee meeting, National Headquarters was instructed to issue all charters immediately upon receipt of proper application form and payment of dues - irrespective of which year's dues are paid. However, if succeeding years are paid, the charter is dated January 1, of the succeeding year. Example - if a charter is granted in July 1990, and 1991, dues are paid - the charter would be dated January 1, 1991, and mailed immediately. If the charter is granted in July 1991, and 1991, dues are paid, the charter would be dated July 1991, and mailed immediately.

**CHARTER LOST OR DESTROYED.** When a charter has been lost or destroyed, a duplicate can be secured through a request to the Department Secretary and payment of the charter fee. Duplicate charter rolls can also be obtained by the same procedure.

**CHARTER CANCELLATION.** A Unit voting to relinquish a charter for cancellation shall vote at a regular meeting of the Unit, with advance written notice to the membership. The Unit charter cancellation shall be voted on by the Department Executive Committee and then forwarded to National Headquarters for vote by the National Executive Committee.

### **CANCELLATION, SUSPENSION AND REVOCATION OF CHARTER**

Under the National Constitution, Unit charters may become non-operative either through cancellation, suspension or revocation. Cancellation is in order when two or more Units merge or when a Unit voluntarily ceases to function.

A Unit charter may be revoked upon failure of the Unit to surrender its charter at the call of the Department President, such a call being authorized in the following cases: a Unit fails to meet the obligations imposed on it by the Constitution, Bylaws, or by ruling of convention or executive committees; a Unit ceases to function from one Department Convention to the next; or a Unit refuses to pay the per capita tax due the Department and National organizations. The Department Executive Committee may order the suspension of a charter for a period not to extend beyond the closing of the next succeeding Department Convention as a disciplinary measure or pending action relative to final revocation.

Units suffering revocation of their charters may appeal to the National Executive Committee the decision of the Department President and the Department Executive Committee. Upon notice of appeal, the National President will appoint a committee to review the action of the Department and make recommendations to the next meeting of the National Executive Committee.

*(Refer to Uniform code of Procedure for the Revocation, Cancellation or Suspension of Unit Charters- Chapter XI.)*

When a Unit ceases to function or its charter has been revoked or cancelled, the charter and all Unit records and funds must be forwarded immediately to Department Headquarters.



## AMERICAN LEGION AUXILIARY

Department of California  
401 Van Ness Avenue, Room 113  
San Francisco, California 94102-4586  
(415) 861-5092 FAX (415) 861-8365  
E-Mail: [calegionaux@calegionaux.org](mailto:calegionaux@calegionaux.org)  
Web Site: [www.calegionaux.org](http://www.calegionaux.org)

### What the New Unit Returns to the Department Office

(Please return all documents in one envelope.)

- \_\_\_\_\_ New Charter Fee — \$10.00 (Payable to National ALA)
- \_\_\_\_\_ Set up Fee to Inscribe Roll (Optional)— \$20.00 plus \$1.00 per Name (Payable to National ALA)
- \_\_\_\_\_ Membership Cards — Stubs A & B (Do Not Separate)
- \_\_\_\_\_ Membership Applications for New Members
- \_\_\_\_\_ Membership Data Forms for Transferring Members
- \_\_\_\_\_ Membership Dues - (Separate Unit check payable to Department of California - \$12.00 per Senior, \$2.00 per Junior)
- \_\_\_\_\_ Transmittal
- \_\_\_\_\_ Charter Application — All Three Copies Are Necessary — Make Sure First Endorsement Is Complete on the Back of Each Copy
- \_\_\_\_\_ Model Unit Bylaws (All 5)
- \_\_\_\_\_ Unit Officers Certification Form (White to Department, Green to District President)
- \_\_\_\_\_ Fidelity Bond Form and \$5.50 (Separate Check Payable to Department of California)
- \_\_\_\_\_ Unit Data Form