



# **How to Organize a Unit of The American Legion Auxiliary**

*Issued by:*

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## How to Form a Unit

The American Legion Post must vote in favor of organizing an Auxiliary Unit. After the Post votes to organize the Unit, the Post Commander or Adjutant notifies the Department President or the Department Secretary. The Department Secretary will send a New Unit Kit that includes information needed to form the Unit to the Post officer. She will notify the Department Representative (District/County President or Unit Development & Revitalization Committee member) so she can work with the Post in organizing the Unit.

When the time and place of the informational and organizational meetings have been determined, a letter under the signature of the Commander and Adjutant should be mailed to all Post members, and a letter to Auxiliary members in the community who belong to the Department Headquarters Unit. Each letter should include the purpose, date, time and place of the two meetings and extend an invitation to become a charter member of the new Unit. (See appendix for sample letters). The Post is encouraged to publicize the meetings in the local media.

The Post Commander and Adjutant should attend these meetings to assist with the organization of the Unit. Other Post members are welcome to attend. The Commander and Adjutant must sign the charter application. The Adjutant, or other Post officer, needs to sign the membership applications to verify proper eligibility.

### Informational Meeting:

The Department Auxiliary representative (District/County President or Unit Development and revitalization Committee member) should chair this meeting. The following should be discussed:

### The National Constitution limits eligibility to the following:

1. Women who of their own right are eligible for membership in The American Legion.
2. Mothers, spouses, daughters, sisters, granddaughters, and grandmothers of members of The American Legion, and deceased veterans having served during the listed war periods.

April 6, 1917 – November 11, 1918  
Any time after December 7, 1941:

(World War I)  
(World War II)  
(U.S. Merchant Marines)  
(Korean War)  
(Vietnam War)  
(Grenada/Lebanon)  
(Panama)  
(Desert Shield/Storm/War on Terror)

### Membership Classes:

The National Constitution provides for two classes of membership: Senior and Junior.

- Senior membership shall be composed of members over the age of eighteen; provided, however, that a spouse under the age of eighteen years, shall be classed as a Senior member.
- Junior Membership shall consist of those members under the age of eighteen years.

### Application:

All new members must complete an individual membership application. The application is to be signed by the member and the Post Adjutant or other Post officer.

### Dues:

Unit will set amount of dues for Senior and Junior members. The amount must include the National per capita for Seniors and Juniors and Department, District/County per capita and any Department, District/County assessment. The National per capita dues for Senior members includes a subscription to the American Legion Auxiliary magazine.

### Formation of Unit:

1. A minimum of 10 Senior members is required to form a Unit. Any number of transferred members may be designated as charter members and can count as the 10 Senior Members. Junior members can also be charter members.
2. Discuss becoming an officer with these potential members.
3. Set date, time and place for the organizational meeting, and date, time and place of the Unit meeting for the next several months.
  - The organizational meeting should be held no later than three to four weeks after the informational meeting.

### Organizational Meeting:

The Department Auxiliary representative should chair this meeting. The following business should be transacted:

1. Introductions: Department/District/County Auxiliary officers and Post Commander who introduces other Post officers.
2. Initiation Ceremony conducted by the District/County President. If she isn't present, the highest-ranking officer present conducts the ceremony.
3. Department representative conducts the election of Unit officers as mandated by their Department Constitution and Bylaws. Newly elected President appoints non-elected officers.
4. Installation of Officers is conducted by the District/County President. If she isn't present, the highest-ranking Department officer present conducts the installation. After installation, the newly elected officers assume their duties.
5. Explain the necessity for a Unit Constitution and Bylaws to govern Unit activities. At the third meeting, suggest the President appoint a committee to develop the Constitution. The Unit mentor will be available to offer guidance. (A sample can be found in the Unit Handbook of the American Legion Auxiliary.)
6. A short business session is to be conducted by the new President. Information to cover:
  - Confirm amount of Unit dues
  - Confirm date, time and place of Unit meeting

- Determine closing date for accepting charter members (National Constitution provides that the charter of a new Unit must be closed thirty (30) days after it has been signed by the Post Commander.)
  - Unit Secretary distributes signed membership cards to new members present
7. After the meeting has adjourned the Unit Secretary, with help from Department representative, completes the following paperwork:
- **Three** copies of the charter application signed by Post Commander, Adjutant and Unit President. Charter Application must include names and addresses of all charter members.
  - Membership applications signed by Post Adjutant or other Post officer for at least 10 Senior members. However, members that are transferring to the new unit will not have to fill out a new application.
  - Dues for each new member application (includes National, Department and District/County per capita and any Department/District/County assessments).
  - Charter fee as determined by Department Headquarters.
  - Completed Unit Data Form.
  - Officer list and any other Department/District/County forms.

***The Unit must take the same name, number and location as The American Legion Post to which it is attached, and these will appear on the charter. The National President and National Secretary will issue the charter on receipt of the charter application, duly attested by the Department President, accompanied by membership applications and National dues for all new members.***

Along with the charter, the Unit will receive a copy of the charter application bearing the endorsement of National and Department officers, form SS-4, instructions for form SS-4, and tax and bond information for units.

# Applying for a New Charter

## Instructions for Unit

When a new Unit is being chartered, the following documents are to be submitted to their American Legion Auxiliary Department Headquarters.

- Charter Application
- Membership Applications
- Membership Cards
- Membership Dues
- Charter Fee
- Unit Data Form
- Unit Officer List and other forms required by Department

1. Charter Application: Typewritten in triplicate, front and back. The front page of the application, Article XI of the Bylaws, Section 2 should include:

- Name of The American Legion Post to which the Unit is attached.
- The Post number and name of Department.
- Signature and complete address of Unit President.

List the names of the additional new members with their complete address. On the last line in this section, type in Unit location and date. On the reverse side of the charter application, the First Endorsement is to be completed and signed by the Post Commander and attested by the Post Adjutant.

2. Membership Applications: Each prospective new member listed on the Charter application must have a completed membership application, unless they are a transfer. Application must be signed by the member and a Post officer to be valid. Eligibility on each member is to be verified by Post officer before submitting application to Department Headquarters.

3. Membership Dues: Unit will set amount of dues for Senior and Junior members. The amount must include the National per capita for Seniors and Juniors and Department, District/County per capita and any Department, District/County assessment.

4. Charter Fee: Amount of charter fee is determined by the Department and should be sent to Department Secretary. An additional fee is charged to have an inscribed Charter Roll. Contact your Department Headquarters for the amount of this fee. A separate typed list of names is required for the Charter Roll.

5. Unit Data Form: This form is used to obtain the contact information of the person to be listed on the National renewal notices. This person must be a current member. Dues amount for Senior and Junior dues is to be listed on the form

After completion of all documents, the Unit is to submit them to the Department Secretary. She will verify that all are correct and then forward them to National Headquarters to be processed.

**Note:** 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. Only members joining within this time frame can be classed as charter members and have their name on the charter.

## New Unit Process/Checklist

### Unit

- \_\_\_ Obtain Charter Application online at <https://www.alaforveterans.org>
- \_\_\_ Print off 3 copies of the charter application
- \_\_\_ Fully complete all 3 copies of the charter application
- \_\_\_ Have all 3 copies signed by the Post Commander and attested by the Post Adjutant.
- \_\_\_ Collect all new member applications (both Juniors and Seniors), or transfer forms signed by the members transferring from another unit. (Along with the dues for those members who still owe for the current year)

*Note:* a minimum of 10 senior members is required to form a new unit

- \_\_\_ Send the following to your Department Headquarters:
  - 3 signed copies of the fully completed charter application
  - All completed member applications or transfer forms
  - Department and National portion of dues for each member
  - Completed form or letter indicating the Unit's total annual dues amount for each Junior and each Senior
  - Charter application fees

*Note:* Charter fee is \$10 and roll is \$10 for up to 20 names with an additional \$0.50 for each name over 20.

### Department

When Charter application packet is received, make sure it includes:

- \_\_\_ The application, fully completed and signed
- \_\_\_ All new unit member applications
- \_\_\_ Dues payment for each member that includes Department and National portion
- \_\_\_ Payment for charter fees
- \_\_\_ A letter or form that indicates the Unit's total annual dues amount for seniors and juniors

Then:

- \_\_\_ Have the Department President sign the charter application
- \_\_\_ Prepare check for national portion of dues; make check payable to "National Treasurer"  
(As of membership year 2019, national dues are \$12.00 per Senior, \$2.50 per Junior)
- \_\_\_ Send charter application, member applications, charter fees, dues payment and unit dues information to the Membership Division at National Headquarters

### National Headquarters will:

- \_\_\_ Verify that Department has submitted 3 copies of fully completed and signed charter application, member applications, unit dues information, payment for national portion of dues, and charter fees payment.
- \_\_\_ Compare the names of each membership application to the names listed on the charter application
- \_\_\_ Calculate the total national dues required to make sure dues payment is correct.
- \_\_\_ Verify that payment for charter application and roll fees is correct.
- \_\_\_ Check that the charter packet includes information on the Unit's dues amount for both Junior and Senior members
- \_\_\_ Create the new unit in the database (ALAMIS) and enter all charter members into the new unit
- \_\_\_ Have the National Secretary sign the new charter
- \_\_\_ Affix seals to the charter and send to the Department Headquarters

*\*Departments are responsible for making new membership cards for unit members*

*Note:* new member applications will be returned to the Department along with the Charter and roll.

(SAMPLE LETTER TO LEGIONNAIRE CONCERNING FORMING A NEW UNIT)

Date

Dear Legionnaire,

Time and again it has been demonstrated that the most successful Posts are the ones who work cooperatively with their Auxiliary Units. Our Post is very interested in forming an Auxiliary Unit as we realize the positive effect a Unit can have on a Post. We hope to build a family organization of Legion and Auxiliary members volunteering together to enable us to do more for our veterans, our youth and the community.

Do you have family, relatives, friends and even co-workers who enjoy volunteering? Would they enjoy helping the Auxiliary in the betterment of our veterans, youth and our community? Are they eligible for membership in the American Legion Auxiliary? If so, will you please share this information in this letter with them?

People eligible for membership are the spouse, daughter, mother, granddaughter, sister and grandmother of a Legionnaire or a deceased veteran having served during the eligibility dates. Women who of their own right are eligible for membership in The American Legion are eligible to join the American Legion Auxiliary.

There will be an informal meeting of interested individuals and Post members on (insert **date**) at (insert **location**) at (insert **time**).

Auxiliary representatives from the District/county will be present at this meeting to provide information on programs and activities, dues, possible meeting date, officers etc. They will also be there to answer any questions you may have.

Having a strong Unit to work closely with our Post will strengthen our commitment to this community.

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Post Commander

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Post Adjutant

*It is recommended this letter be written on Post stationery.*

**SAMPLE LETTER**