

# OFFICER TRAINING 2018



Congratulations! You've been elected to a very important position in the VFW Auxiliary as an officer. This is a serious responsibility and there is much to learn in order to perform your duties correctly.

These slides are meant to supplement reading of the By-Laws and provide answers to some of the "unwritten" expectations in the various officer positions. The Auxiliary NEEDS people like you who are willing to take on these important roles so we thank you for your service!

# PRESIDENT'S RESPONSIBILITIES



Congratulations! You've been elected President! The journey begins!

- Ideally you would have been the Sr. VP in the prior year and shadowed your President to meetings, events, been mentored
- If not, meet with your District President after election to receive mentoring prior to installation

# PRESIDENT'S RESPONSIBILITIES



- Secretary and Patriotic Instructor are appointed by the President at time of election, so if you're running ask people if they would like to be appointed to those positions
- When elected, you are prepared to announce those appointments.
- If you haven't decided yet, need to immediately do so.

# PRESIDENT'S RESPONSIBILITIES



Your responsibilities are many! And Extremely important to the health of the organization. You are in charge of the Auxiliary Charter.

- To lead the auxiliary in a manner that brings honor to the organization.
- To represent the auxiliary at District, State and /or National level meetings as required and able.
- To ensure the by-laws are followed and ritual is followed at meetings.
- To ensure that meetings are held once a month (a minimum of 10 meetings a year) and that ALL auxiliary members are treated with respect and dignity.

# PRESIDENT'S RESPONSIBILITIES



- To foster the membership and strive to bring the auxiliary together in spirit and in the work it is chartered to perform.
- The President shall interface with the Commander of the VFW Post and they are to WORK TOGETHER, assisting the VFW as required however possible. Working together helps the Post as a whole grow stronger and be united in the common good.
- The auxiliary should be ASSISTING their VFWs. The President NEEDS to work together with the Commander. You are a team. Work together. We're there to help them.

# PRESIDENT'S RESPONSIBILITIES



- Educate yourself for the role. Before you even take the oath of office, ask for a copy of the By-Laws if you don't have one.
- READ AND LEARN YOUR BY-LAWS! How to function is spelled out in there.
- Read the Oath of Office and understand it before you even take it.
- Study the by-laws so that you can answer questions of the members regarding them. This is how the organization operates and what the District and State officers base any answers to you on. The by-laws!
- You are the leader. Do not micro-manage your people. Lead them by being helpful, working along side of them and being a team. You will be successful!

# PRESIDENT'S RESPONSIBILITIES



- When you take your Oath of Obligation, truly understand what it means and what the responsibilities are.
- Listen carefully.
- Again, read a current By-Law book.
- Make sure yearly you keep up with the by-laws as they change each year in large and small ways. It does affect the Auxiliary.

# PRESIDENT'S RESPONSIBILITIES



- Be firm of the discharge of your duties but strive to promote harmony, courtesy and kindness to all members. THIS is a big part of your responsibilities. EVERYONE needs to have a voice, feel as though they are being heard, participating as much as they want
- You WANT to delegate tasks to members while gently overseeing that they are completed. This is not a dictatorship. You're the "conductor" if you will of a symphony. It's your job to ensure that everyone else understands their job and you need to be knowledgeable to answer questions.
- Don't be bossy! Promote harmony because teamwork is the key to a successful Auxiliary. Listen to what your members are telling you with an objective ear.



# PRESIDENT'S RESPONSIBILITIES



- Use the Chain of Command if you do not know something.
- Contact your District President first with questions or requests for assistance. If they need help, they will contact the Department (State) officers.
- ASK! That's how you will learn.

# PRESIDENT'S RESPONSIBILITIES



- You are expected to attend District meetings, C of As and other Department functions, if possible.
- You are the eyes, ears and future of this department and you represent your auxiliary at these events.
- You can ask other members to also participate, especially your Sr. Vice and Treasurer.
- You will also learn in that way and be a better President.
- You should be training your Sr. Vice to eventually become President. Let them run meetings occasionally to get comfortable and take them with you to District, C of As, etc.

# PRESIDENT'S RESPONSIBILITIES



- **Time-line:** Typically you're elected in April, you take your oath in May and you take office after the State Convention in June. So there's plenty of time to read through the By-laws before you start.
- **Appointments** - It's the President's responsibility, per the by-laws, prior to holding your first meeting in July to APPOINT CHAIRMEN! Don't try to do them all yourself.
- Explain what they need to do then let them do it! They are to report to you on progress and at the meetings THEY should stand and share the progress and results. If they need assistance, they will ask. Most people, if they volunteer, will complete the mission with guidance and help. Help them find co-chairmen to volunteer to help them. They will typically ask their friends, etc.

# PRESIDENT'S RESPONSIBILITIES



- Appoint your 5 person membership committee
- Typically your top 3 officers (Pres, Sr. Vice and Jr. Vice) as well as the Treasurer and the Secretary or a Trustee.
- THIS is important!
- Membership is critical to the survival of our organization!
- This committee should get started immediately!

# PRESIDENT'S RESPONSIBILITIES



- **Reporting** - President and Secretary
- **Reporting** is extremely important!! President's responsibility to see that reports are completed. Assign who's going to do the reporting.
- You, Secretary, chairman, etc. or a combination of all. But this information is **CRITICALLY** important to the survival of our organization and our value to our Veterans.
- Understand the **Programs!!** Here's a great link <https://vfwauxiliary.org/resources/>

# PRESIDENT'S RESPONSIBILITIES



- **Mentoring** – It's an important part of the role that you help to mentor new members.
- Match them up with a seasoned members to sit with them, explain the auxiliary traditions.
- It is SO IMPORTANT that you DO NOT complain about other members to or around other members whether they are new or not.
- Suggestion - Create a welcome package for new members explaining the auxiliary, what you do locally, made sure you have pins on hand to pin them when they are initiated and GO THROUGH the initiation process!
- It makes new members feel like they belong to something great!

# PRESIDENT'S RESPONSIBILITIES



- **July** – You and your Treasurer are elected and installed at this point.
- You **MUST** go to the bank and transfer the account to the new president and treasurer **BEFORE** writing any checks.
- When you conduct first meeting in July, your responsibility is to get the Commander a written financial report and the current membership. They must have a breakdown of all the finances, and a year ending membership report. A copy of your June Treasurers Report should suffice since it provides the total finances as of the end of June.
- You do **NOT** give the commander copies of your audits, bank statements, etc., just a summary financial report and advise how many current members the Auxiliary has.

# PRESIDENT'S RESPONSIBILITIES



- **August** – You and the Treasurer **MUST BE BONDED!**
- This is required to be done prior to Aug. 31<sup>st</sup>.
- You can do this any time in July or the beginning of August.
- It can be done by the Treasurer right on-line through MALTA.
- This is required since the President must countersign any checks that the Treasurer writes.



# PRESIDENT'S RESPONSIBILITIES



- **Also in August - Standing Motions** should be reviewed or if the Auxiliary doesn't have any, should be written!
- What are standing motions? Do you have some in your auxiliary?
- Each Auxiliary should and they should be reviewed yearly at the Aug. meeting. This is one of your first responsibilities at a meeting.
- The President should have a copy, there should be a copy in the front of the secretary's book as well. All standing motions must be voted on at a meeting and the body must be in agreement.
- If your auxiliary does not have standing motions, contact your District President for assistance.

# PRESIDENT'S RESPONSIBILITIES



- What kind of Standing Rules (motions) are appropriate? (Ref. Sec. 211)
- Things that you need to approve all the time such as paying delegate fees, standing required Dept. donations, supplies the Treasurer will need to purchase for her job, love gifts for Dept. President's visit or installing officer's gift, etc.
- Here are some examples of a standing motion.
- The Treasurer is allowed to purchase required supplies or place orders from National without a vote. You can add up to a certain dollar amount.
- National, Dept. and Dist. Obligations should be paid no later than the end of October. List the amounts the Treasurer needs to pay.
- Emergency fund - a member in need, Pres. Treasurer and 3 trustees need to be notified and in agreement to handle the emergency up to \$200 (for instance) and only twice a year for the same member. In an emergency checks always must be made out to landlord, utilities, etc. NEVER to the member.

# PRESIDENT'S RESPONSIBILITIES



- **Meeting protocols:**
  - There are different types of meetings, all outlined in the By-Laws:
  - Round Table –
  - Contemporary-
  - Traditional-
- 
- Choose the type of meeting you want to run and stick with it! It's highly recommended that you choose the Contemporary or Traditional since those are the meetings that your District and Department will be running and you need to know the proper protocol for those types of meetings when you attend.

# PRESIDENT'S RESPONSIBILITIES



- Utilize the “Blank Contemporary Meeting Agenda and Motions” as a basis to conduct your meeting
- Also need to understand how to make motions
- This form is located on the [nhvfwaux.org](http://nhvfwaux.org) website under “Dept. Officers”, “From the Secretary” under Misc.
- Get a copy and write on it for each meeting so you run a clean, efficient meeting and cover all the required parts of the meeting

# PRESIDENT'S RESPONSIBILITIES



- A Regular “scheduled” business meeting is the one you hold monthly at a certain day and time and you MUST hold at least ten (10) business meetings per year.
- If for some reason that meeting will not be held or you change the date/time (for weather for instance) you MUST notify the District and Dept. Secretary so that if there was a plan to visit your meeting, the District and Department knows you will not be holding it. WHY? Because your meetings may be inspected.
- Representatives from District and Department may at any time come to do a formal or informal inspection. Dist. Presidents typically will coordinate an inspection once a year with each auxiliary in their District.

# PRESIDENT'S RESPONSIBILITIES



## **When is the Bible closed?**

- When there is going to be a recess of meeting business such as after the initiation of new members if you recess for a few minutes to welcome them into the Auxiliary.
- During Department meetings if there's a membership parade of transmittals, that's a recess of the normal meeting business so the Bible is closed and re-opened.
- There is absolutely NO Movement or talking while the Chaplain is on the floor opening or closing the bible. Do NOT rap the gavel when the Chaplain is moving. WAIT until they are back at the seat before the 3 raps.

# PRESIDENT'S RESPONSIBILITIES



- **Special Meetings** - The Auxiliary President can call a Special Meeting for many reasons or a special meeting can be called for, upon request in writing, signed by five (5) members in good standing.
- The Aux. Secretary shall notify all members in writing of the time and place (can do it via email and if you want to send it to members who are out of town, you can if you'd like, but if they are not regularly attending members it's not necessary) of any special meeting and the business to be transacted, such notice to be sent at least 48 hours in advance of the time set for the meeting.
- Only the business intended to be discussed can be transacted.
- It is ok to use Skype or other electronic means such as conference call on speaker phone to patch members in so they can vote. You **MUST** have a quorum in the room physically, but others can call or Skype in to participate and vote.

# PRESIDENT'S RESPONSIBILITIES



- What makes a **quorum**? (Ref. Sec. 212)
- Five (5) members *in good standing* shall constitute a quorum for the transaction of business at any meeting of the auxiliary.
- Regarding **continuous members** – Not in good standing after 12/31 of the year if dues is not paid. Therefore they cannot attend meetings, vote or participate until dues are paid for the year.
- After June 30<sup>th</sup> of the year, if dues are not paid they are no longer members and must rejoin by proving their eligibility.



# PRESIDENT'S RESPONSIBILITIES



- It shall be your duty to see that there is no disruption during the meeting and if so you have the right to have the member causing the disruption gaveled and/or removed.
- You need to continually try to get members to attend meetings. You need to be organized when you're running your meeting so that they run smoothly, efficiently and are effective. How? Use the meeting template we talked about before.

# PRESIDENT'S RESPONSIBILITIES



- **Templates** – Meeting template should be followed. (in the bylaws!)
- YOU need to be prepared with old business, new business, Good of the Order, your upcoming events, report of program chairs, Reports of Committees. (that is where the audit is read) (in the bylaws). Follow the by-law meeting format.
- See the Meeting Template mentioned above.
- What if members sign up but don't come to a meeting – What to try:
  - ✓ Mentoring is important
  - ✓ Reach out to them quarterly
  - ✓ Encourage joining in with events to build some friendships
  - ✓ Again, be a leader and conduct the organization with a kind heart and delegate.

# PRESIDENT'S RESPONSIBILITIES



- **Motions** – Important that the making and 2nding of motions is properly understood and carried out.
- This is in the by-laws
- Also we have an example on the [nhvfwaux.org](http://nhvfwaux.org) website under “Dept. Officers”, “From the Secretary” under “Misc.” at the end of the Meeting Agenda document.
- We mentioned this before. These are KEY Concepts!

# PRESIDENT'S RESPONSIBILITIES



- **Delegates** – Delegates for the District need to be elected more than 30 days prior to the District Encampment (typically election in March).
- Dept. and National Delegates are typically elected at the April meeting (again, more than 30 prior to the Dept. Convention) along with the other officers.
- The Secretary will fill out the delegate form send to the District Secretary immediately following the election. Dept. delegates form is filled out by the Secretary and sent to the Dept. Secretary and the Dept. delegate fee, with a copy of the delegate form, is sent by the Aux. Treasurer to the Dept. Treasurer.
- National Delegates are entered online. If any national delegates are going to attend the National Convention, they typically go online and pay the delegate fee themselves.
- Secretary is to keep a copy of all the delegate lists so that they are available to the President.
- **The delegates' term begins immediately upon election as they will be the ones who will be voting at the upcoming conventions within the next few months.**

# PRESIDENT'S RESPONSIBILITIES



- What happens when **an officer resigns?** (Ref. Sec. 809)
  - All resignations of Officers should be in writing and sent to the Secretary of the body from which resigning. If secretary is resigning, resignation is sent to the President of the body
  - Resignations are effective when issued (immediately).
  - Verbal resignations are binding (once you say it it's done)
  - The short version is that officers move up (i.e. the President resigns, the Sr. becomes President, the Jr. becomes Sr. and immediately assumes duties without installation). An election is held at the next regular meeting for the office of Jr VP or any other office vacated.
  - Due notice of contemplated election shall be deemed given if the President announces that the election will be at the next regular meeting.
  - If the Sr. and/or Jr. decide they do not want to move up, they should resign and need to be re-elected to those positions.

# PRESIDENT'S RESPONSIBILITIES



- Who verifies funds for **fund raisers**? (Sec. 915)
- Auxiliaries and other levels shall not solicit funds or donations except by prior vote. No Auxiliary shall be permitted to solicit funds or donations by employing, in part or in whole, fundraising organizations or individuals, without the prior approval of the Auxiliary Department Council of Administration.
- Typically a Chairman is appointed by the President to oversee conducting the fundraiser. The President and Treasurer should be involved in the verifying the funds for the project and ensuring funds are deposited. President and Treasurer are BONDED positions.
- Trustees are then responsible to ensure that the funds which were said to have been collected show up in the accounts correctly.

# PRESIDENT'S RESPONSIBILITIES



- This is NOT an exhaustive list of duties and responsibilities, but ultimately you will determine the direction and mood of your auxiliary.
- Make it one of cooperation, friendship, kindness
- Focus on the fact that we are here to help our veterans and that should always be our direction.
- Participate in the Auxiliary programs and you will be doing the good work of the organization





# DISTRICT PRESIDENT'S RESPONSIBILITIES



- If you have been interested in holding the District President's position, ideally you would have been the District Sr. Vice President in the prior year and shadowed your President to meetings, events, been mentored by them so that you are better prepared for the office.
- If you have not had that opportunity, the Department President will assign a mentor to you.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- The District Secretary and District Patriotic Instructor are appointed by the District President at time of election so know who it is you would like to be in those positions prior to the election, if possible. That way if you are elected, you're prepared with those 2 appointments.
- The District President's responsibilities are many and extremely important to the health of the organization:



# DISTRICT PRESIDENT'S RESPONSIBILITIES

- **How many offices can be held during a year? (Ref. Sec. 801)**
- No member shall hold two (2) elective offices on the same level at the same time.
- The member MAY hold one (1) elective office and one (1) or more appointive offices on that level, the exception being that a Trustee may hold another elective or appointive office other than President, Secretary or Treasurer.
- Officers, elective or appointive, may hold office in a higher or lower body and such offices may be held concurrently. (i.e. District President could be elected as a Dept. Officer or as an Auxiliary officer as well)
- If you have questions, contact your Department Pres.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Educating yourself for the role:** Before you even take your oath of office you need to **READ AND LEARN YOUR BY-LAWS!** How to function is spelled out in there. (See Article V Districts and Sec. 810C).
- Ideally you would have been an Auxiliary President or other senior officer at the Auxiliary level so that you have a thorough understanding of the By-laws.
- Read the Oath of Office and understand it before you even take it. Study the by-laws so that you can answer questions not only of the members but of the Auxiliary Presidents who are in your District. This is how the organization operates and what the State officers base any answers to you on. The by-laws!

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- When you take your Oath of Obligation, truly understand what it means and what the responsibilities are. Listen carefully. Again, read a current By-Law book.
- Make sure yearly you keep up with the by-laws as they change each year in large and small ways. It does affect the Auxiliary.
- As with being an Auxiliary President, be firm of the discharge of your duties but strive to promote harmony, courtesy and kindness to all members. THIS is a big part of your responsibilities. Don't be bossy!
- Promote harmony because teamwork is the key to a successful Auxiliary. Listen to what your members are telling you with an objective ear.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- Use the Chain of Command if you do not know something. Contact your Department officers with questions or requests for assistance. But ASK! That's how you will learn.
- Utilize the meeting templates that exist to run your District meeting. You are representing multiple Auxiliaries within your District and you will be required to perform an inspection of each auxiliary during your term of office at least once.
- You should try to attend the auxiliary meetings more than once during your term. Call your Presidents once in a while just to check in and say hi. Keep an open communication with them all. See if there's anything they need as far as help or guidance.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- The true objective of the District meeting is TRAINING!! At the District meeting, be sure that something of value is taught during the meeting that will benefit the Auxiliary officers.
- Ask the Auxiliary Presidents to participate in a School of Instruction by perhaps finding out what they need help with and asking them to present the training at the District meeting.
- This will also help increase attendance at the District meeting if the President themselves are giving the School of Instruction. (Sections of the By-Laws)

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- Good topics for a School of Instruction can be understanding what a quorum is, Standing Motions, Delegates, regular vs. special meetings, Chain of Command, Protocol, etc.
- Several things can be taught during one School of Instruction but it should be something related to the By-Laws. Not such things as how to fold a flag. For example reporting can be part of the School of Instruction in conjunction with another topic.
- You want to make the meetings interesting and educational so that you will increase attendance.



# DISTRICT PRESIDENT'S RESPONSIBILITIES



- Be sure that programs are discussed and that each auxiliary has a chance to share what they have going on in their Auxiliary as far as important events.
- This helps everyone to be supportive of each other's Auxiliary and build more of a community feel within your District.
- We are all part of a greater whole. No Auxiliary is an island nor should it function as such.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- Auxiliary Presidents should be coming to you first for guidance and to report any issues going on in their Auxiliary (chain of command).
- If you are unable to resolve the issue or have questions, contact the Department President.
- Per Sec. 810C, the District President acts as a liaison between the Department President and the Auxiliary Presidents.



# DISTRICT PRESIDENT'S RESPONSIBILITIES

- The District cannot hold large fund raising events. Minimal money is needed to run a District and money's should be coming from District Dues assessed to each Auxiliary in the District (can't exceed \$.50 per member)
- By collection of a "fee" at each meeting (i.e. everyone gives a \$1).
- Districts CAN hold a 50/50 raffle at each meeting among the members present. Collect \$2 and \$1 goes to the winner and \$1 goes to the District treasury for instance. This should provide enough funds for what's required.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- As a District President you are a voting member of the Council of Administration (C of A) and you are expected to conduct the District meetings, attend the C of As and other Department functions, if at all possible.
- You are the representative of your entire District and Department will flow information down through you as well as you should be flowing information up to Department regarding any issues within your District.
- You can ask other members to also participate, especially your Sr. Vice and Treasurer. You will also learn in that way and be a better District President.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- You should be training your Sr. Vice to eventually become President.
- Although there are typically only 2 - 4 District meetings a year (depending on the District), perhaps your Sr. Vice could run one of the meetings to get comfortable and bring them with you to Department functions, if able.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Time-line:** The District Encampment shall be held not less than ten calendar days nor more than seventy-five days prior to the Department Convention.
- Typically you're elected the end of April or in May and you take your oath immediately at the District Encampment.
- You need to decide who will install you and your officers. Must be a Past District President or Commander or someone who has held a higher office.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Appointments** – The District President shall appoint such committee Chairmen as required. Explain what they need to do then let them do it!
- They are to report to you on progress and at the meetings THEY should stand and share the progress and results. If they need assistance, they will ask.
- **Mentoring** – It's an important part of the role that you help to mentor Auxiliary officers. It is SO IMPORTANT that you DO NOT complain about other members to or around other members whether they are new or not.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **July** – You and your Treasurer are elected and installed at this point. You **MUST** go to the bank and transfer the account to the new District President and District Treasurer **BEFORE** writing any checks. Also, a financial report as well as membership status report must be sent to the District Commander within 30 days of the Department Convention.
- **August** – You and the Treasurer **MUST BE BONDED!** This is required to be done prior to Aug. 31<sup>st</sup>. You can do this any time in July or the beginning of August.
- It can be done by the District Treasurer right on-line through MALTA. This is required since the District President must countersign any checks that the District Treasurer writes.



# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **At your first meeting - Standing Motions** should be reviewed or if the District doesn't have any, should be written! The District President should have a copy, there should be a copy in the front of the District secretary's book as well.
- All standing motions must be voted on at a District meeting and the body must be in agreement. What kind of Standing Rules (motions) are appropriate? (Ref. Sec. 211)
- Things that you need to approve all the time such as buying the bond, covering banquet tickets, travel to the C of As, District Dues amounts, Past District President's gem allotment, etc.
- If your District does not have standing motions, contact your Department President for assistance.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



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- If your District does not have standing motions, contact your Department President for assistance.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Meeting protocols:**
- It's highly recommended that you choose the Contemporary or Traditional since those are the meetings that your Department will be running and you need to know the proper protocol for those types of meetings when you attend.
- Utilize the “Blank Contemporary Meeting Agenda and Motions” as a basis to conduct your meeting and understanding how to make motions located on the [nhvfwaux.org](http://nhvfwaux.org) website under “Dept. Officers”, “From the Secretary” under Misc.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- If for some reason the meeting will not be held or you change the date/time (for weather for instance) you **MUST** notify the Dept. Secretary so the Department knows you will not be holding it.
- **WHY?** Because your meetings will **ALWAYS** be inspected.
- A representative from Department will come to do a formal inspection.



# DISTRICT PRESIDENT'S RESPONSIBILITIES

- What makes a District **quorum**? (Ref. Sec. 507)
- The minimum number of delegates required to constitute a quorum for the transaction of business at a District meeting or Encampment shall not be less than officers and/or delegates representing  $\frac{1}{4}$  of the Auxiliaries of the District.
- *A minimum of 5 members in good standing* are required to constitute a quorum. The Auxiliary President shall be considered a delegate.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- When the Chaplain is up and moving, NO ONE is to move. You will WAIT until the Chaplain gets back to her seat BEFORE you do the 3 raps for everyone to be seated.
- It shall be your duty to see that there is no disruption during the meeting and if so you have the right to have the member causing the disruption gaveled and/or removed.
- You need to continually try to get members and Auxiliary Officers to attend meetings. THIS is where they are going to learn! You need to be organized when you're running your meeting so that they run smoothly, efficiently and are effective. How?

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Motions** – Important that the making and 2nding of motions is properly understood and carried out.
- This is in the by-laws, but also we have an example on the [nhvfwaux.org](http://nhvfwaux.org) website under “Dept. Officers”, “From the Secretary” under “Misc.” at the end of the Meeting Agenda document.

# DISTRICT PRESIDENT'S RESPONSIBILITIES



- **Delegates** – Delegates for the District are elected more than 30 days prior to the District Encampment.
- The District Secretary will have the forms from the auxiliaries on file so that they are available to the District President.
- The delegates' term begins immediately upon election as they will be the ones who will be voting at the upcoming conventions within the next few months.



# DISTRICT PRESIDENT'S RESPONSIBILITIES



- You are the leader of your District.
- Do not micro-manage your people.
- Lead them by being helpful, working along side of them and being a team.
- You will be successful!



# TREASURER'S RESPONSIBILITIES



- Congratulations on being elected Auxiliary Treasurer!
- The job of Aux. Treasurer is a critically important one!
- You are the President's right hand person when dealing with auxiliary funds.
- This is meant to help you in your role, but is not a substitute for reading the By-Laws and understanding them.
- Understand **MALTA!!** Watch the training videos!  
**<https://vfwauxiliary.org/online-auxiliary-academy/>**

# TREASURER'S RESPONSIBILITIES



- **IMPORTANT! Go to the bank with the President at some point in July to transfer names on accounts.**
- **The Treasurer and the President must be bonded by Aug. 31<sup>st</sup>. Treasurer can do this via MALTA.**
- The treasurer shall be the one to handle aux. funds. At the end of her term, or if so ordered, hand over all paper, books, money and other property of the Aux. in her possession.

# TREASURER'S RESPONSIBILITIES



- All funds shall be accounted for by the Treasurer in the Aux. books which shall consist of a ledger, cash book or a computerized system (Excel Spreadsheet works great!) and printed and secured in a permanent record book (3 ring binder) so long as the records contain the same data a required formats prescribed by Nat'l.
- Keep the checkbook in order, making sure all funds are accounted for.
- Treasurer shall collect all money due and needs to have a receipt book to always give a receipt for all cash.

# TREASURER'S RESPONSIBILITIES



- Aux. treasurer shall order all supplies and have charge of supplies for the Aux. purchased from National HQ by vote of the Aux.
- Aux. has a general fund, a Relief Fund and any other funds needed such as a Kitchen Fund, Maintenance Fund, a Bingo Fund and so forth.
- Money in the funds shall be maintained in ONE checking account.
- The Aux. may also have savings and investment accounts upon approval of the Aux. Amount should not exceed the bonded amount.
- Aux. may NOT possess credit cards, ATM cards or debit cards.

# TREASURER'S RESPONSIBILITIES



- General Fund contains unrestricted moneys, which may be expended for any purpose.
- The other Funds established contain restricted funds, which may only be expended for the purposes for which they were received.
- Relieve fund may only be used to help veterans in need in some way. Any Poppy Drive income **MUST** go into the Relief Fund.

# TREASURER'S RESPONSIBILITIES



- The Treasurer shall collect and process dues in accordance with the procedures established by the Nat'l treasurer.
- The treasurer's report shall be given following the reading of the minutes and shall include in detail, all receipts and disbursements of the last meeting and pre-approved customary expenses since the last meeting. No motion to accept this report is necessary.
- All checks must be countersigned by the President. Treasurer must not sign blank checks nor shall President Countersign blank checks.
- If the Treasurer is unable to be present at a meeting, the Aux. Pres. shall appoint someone, possibly the secretary, to read the treasurer's report and record receipts. Treasurer shall, as soon as possible following the meeting at which she was absent, prepare checks for payment



# TREASURER'S RESPONSIBILITIES



- **Delegates** – Make sure the proper amount of delegate fees are sent to the Department.
- The National Delegate fees can be submitted via MALTA and paid for by the Aux. or by the attendees.
- The Aux. treasurer shall send the names and fees, if applicable, of the Delegates and Alternates to the Dept. Treasurer prior to the Dept. Convention.

# TREASURER'S RESPONSIBILITIES



## Audits

- Treasurer **MUST** be present at all audits. You can do the audit with 2 trustees, don't need a pro-tem trustee!
- Need the secretary books if Secretary can't make it.
- President may be present, but not required.
- Audits must be voted on an approved prior to mailing to dept. You **MAY** scan and email the audit to the Dept. Treasurer.
- If unable to get your audit report to Dept. prior to deadline, you **MUST** request and extension through Dept. Treasurer.
- The Trustees/Audit committee members shall sign each page in said permanent record books, bank statements, checkbook, treasurer's reports, etc. (Yes it can be cumbersome, but it's to protect you as the trustee. At least sign where the audit went up to in a register for instance.)

# TREASURER'S RESPONSIBILITIES



- **Deposits** should be made in a **TIMELY** manner! Do NOT issue signed, blank checks to anyone!
- Make sure the checkbook is balanced and reconciled **PRIOR** to doing the audit.
- When **inspections** are being held, you **MUST** bring **ALL** the books and materials (checkbook, ledger, bank statements, etc.) Made sure the Bond is available for inspection (Pres., Treasurer, Sec. should have a copy).

# TREASURER'S RESPONSIBILITIES



- **Membership:** Treasurer is the Membership Chair in your Auxiliary.
- You should have a 5 person committee. Pres., Sr. VP, Jr. VP, Secretary can have a trustee instead of Secretary if you want. But you have to have a 5 person committee.
- YOUR job is to pull these people together, if needed, to contact (call, email, etc.) unpaid members and try to get them to pay prior to the end of the calendar year.
- The GOAL is to increase membership all the time! Recruit! Be active. Treasurer can parcel out to the membership committee a number of members to call. Each calls 10 for instance.
- GOAL, become 100% in membership by Dec. 31<sup>st</sup>.

# TREASURER'S RESPONSIBILITIES



- Members need to understand that if they do not pay their dues by Dec. 31<sup>st</sup>, they are NOT in good standing and can no longer attend meetings, vote or be elected as delegates until their dues is paid.
- If they do not pay their dues by June 30th, they are no longer members at all and will need to RE JOIN and prove their eligibility.
- No matter how long they were members, their continuous membership starts over at (1). Don't let this happen to your members!!
- If there's a need for financial help, the President, Treasurer and Trustees can determine if the Auxiliary should pay their membership in the case or hardship.

# TREASURER'S RESPONSIBILITIES



- YOU need to know how to read a DD-214, and the eligibility requirements. IMPORTANT.
- Anyone can do an investigation report. Need to have a 3 person investigation committee. (Example: President, Treasurer, and someone else)
- If you need the commander's help because you don't understand a DD-214 that's fine, but Commanders do NOT decide who is or is not approved to be a member in the Auxiliary.
- But if still unsure, seek guidance from the VFW Dept. Adjutant. The only thing you can use for eligibility is the DD-214.

# TREASURER'S RESPONSIBILITIES



- **MALTA** – Need to know how to utilize the program.
- How to enter in new members, rejoin member, check your memstats, access rosters, name, address, phone number changes.
- **IMPORTANT!** Keep MALTA updated and accurate.
- Watch the MALTA training videos. Run reports, utilize the resources.
- Questions can be asked of the Dept. Treasurer.

# TREASURER'S RESPONSIBILITIES



- **Meeting protocol -**
- If during a meeting a member does not have their membership card, the treasurer will be asked to determine if the member has paid their dues.
- Must create a treasurers report (preferable in Excel spreadsheet), and read the report at the meeting. You cannot give a copy of the treasurer's report for people to keep. If you pass out copies so they can follow along, they must be numbered and collected after the report is read.
- Any bills or receipts should be maintained with the treasurer's report for that month. All bills or receipts presented must be read by the Secretary and SIGNED by the Trustees.



# TREASURER'S RESPONSIBILITIES



- Who verifies funds for **fund raisers**? (Sec. 915)
- Auxiliaries and other levels shall not solicit funds or donations except by prior vote. No Auxiliary shall be permitted to solicit funds or donations by employing, in part or in whole, fundraising organizations or individuals, without the prior approval of the Auxiliary Department Council of Administration.
- Typically a Chairman is appointed by the President to oversee conducting the fundraiser. The President and Treasurer should be involved in the verifying the funds for the project and ensuring funds are deposited. President and Treasurer are BONDED positions. Trustees are then responsible to ensure that the funds which were said to have been collected show up in the accounts correctly.



# TRUSTEE'S RESPONSIBILITIES



- Congratulations! You've been elected as an Auxiliary Trustee.
- This is an extremely important role and it must be carried out correctly to ensure the funds of the auxiliary are properly overseen.
- This is meant to assist in understanding your role but is not a substitute for reading the By-Laws as well.

# TRUSTEE'S RESPONSIBILITIES



- **Audits**
- Mainly it is the responsibility of the Trustees to conduct quarterly audits of the auxiliary books.
- All audits are to be completed by the elected Trustees, with a minimum of two (2) in attendance.
- The President, Secretary and Treasurer should attend the audit, but it is the job of the Trustees to conduct the audit. Others are there in case you have questions or need explanations.
- Once completed, ALL pages attached to the record books shall be signed by the Trustees at the time of the audit. These documents include:

# TRUSTEE'S RESPONSIBILITIES



- The Secretary's record book
- The Treasurer's record book (ledger and/or spreadsheets)
- The Checkbook
- The bank statements
- The cancelled checks
- Deposit slips
- The savings account books or certificates of deposit, if any

# TRUSTEE'S RESPONSIBILITIES



- EVERY page of each item must be signed. (Can initial and date most pages and sign at least one fully. Ask permission of the Dept. President if you feel there's an exception to consider. )
- A pro tem CAN be appointed to audit the books under extenuating circumstances, but there has to be at LEAST one elected Trustee auditing the books. Ask your District President for guidance on this.
- Audits must be completed **prior** to the meeting for that month in order to be properly voted on.

# TRUSTEE'S RESPONSIBILITIES



- **First quarter** audit covers months of Jan, Feb and March and shall be conducted during the month of April. Must be mailed to the Dept Treasurer no later than April 30<sup>th</sup>
- **Second quarter** audit covers months of April, May and June and conducted in July. Must be mailed to the Dept. Treasurer no later than July 30<sup>th</sup>.
- **Third quarter** audit covers months of July, August and Sept. and conducted in October. Must be mailed to the Dept. Treasurer no later than October 30<sup>th</sup>.
- **Fourth quarter** audit covers months of Oct., Nov. and Dec. and conducted in January. Must be mailed to the Dept. Treasurer no later than January 30<sup>th</sup>.

# TRUSTEE'S RESPONSIBILITIES



- It is the duty of the Trustees, no later than the end of the month following the expiration of each quarterly period, to properly audit the books and records of the Aux. Treasurer and Secretary.
- (For instance, if your meeting is the 2<sup>nd</sup> Mon. each month, the Trustees must get together prior to that meeting in January to conduct the audit of the books from Oct. – Dec.)



# TRUSTEE'S RESPONSIBILITIES



- Trustees shall submit to the Treasurer and Trustee #1 shall read the written report during the Aux. meeting following the end of the quarter. (In our example above, the audit is done prior to the January meeting and the audit report is read during the January meeting). (if Trustee #1 is not available any other Trustee can read the report).
- A motion to accept the audit is made by Trustee #1 on behalf of the committee is required but no second is required since you're making the motion on behalf of the committee.
- A copy of the accepted audit shall be included in the auxiliary secretary and treasurer's books.
- Copy of the audit is sent to the Dept. Treasurer by Trustee #1 via mail **or email** prior to Jan. 30th. President may have a copy as well.

# TRUSTEE'S RESPONSIBILITIES



- Any negligence on the part of the Trustees in carrying out the mandates of these duties or in attending audits **shall make them individually and collectively responsible with any others for any discrepancy.**
- **Yes, you can be held personally responsible if you do not correctly conduct audits. It is an important position!**

# TRUSTEE'S RESPONSIBILITIES



- **You are NOT to simply sign an audit report that anyone provides for you indicating that the audit was completed.**
- **If you are a Trustee, YOU and your other 2 Trustees are REQUIRED to conduct the audit yourselves. No one else has the authority to conduct an audit.**
- **You should never sign something that anyone puts before you saying the books are accurate. There is a proper process.**
- **If you need training regarding how to properly conduct an audit, please contact your District President.**

# TRUSTEE'S RESPONSIBILITIES



- Quarterly, the trustees record the date of audit and certify by their signatures in all books and on the audit report form that the books and records were found correct through their own review.
- Trustees are to verify all expenditures of the Aux. and certify by their signatures to the correctness of each bill before payment may be made of the same by the Treasurer.
- When bills are submitted during meetings, trustees must read and sign each receipt to approve.

# TRUSTEE'S RESPONSIBILITIES



- Trustees shall audit the records and accounts of all committees, Officers and members having to do with the receipt and expenditure of Aux. funds. Audit reports must be incorporated in the minutes.
- Trustees **do not** correct the Treasurer's or Secretary's records. The Treasurer or Secretary does.
- If for some reason the audit is unable to be performed and needs to be submitted late, a request must be made to the Dept. Treasurer by the officers to ask for an extension explaining why it cannot be done on time.

# TRUSTEE'S RESPONSIBILITIES



- **Forms available**
- There are certain forms available to use which will help the Trustees to perform the audit properly.
- And there is an audit report form required to be used and sent to the Dept. Treasurer.
- These forms are available on the NH Auxiliary website ([nhvfwaux.org](http://nhvfwaux.org)) under the “Dept. Officers” “From the Treasurer” section.

# TRUSTEE'S RESPONSIBILITIES



- **Meeting protocol**
- On the months that an audit has been performed, the President will ask under the reports of committees for the audit report to be read.
- Trustee #1 (if available) reads the report and makes a motion on behalf the audit committee to accept the audit as read. (no second to the motion is necessary). Membership needs to vote on this.
- Also during the meeting, the Trustee #1 will be asked to make a motion on behalf of the committee to accept all money collected that night and pay all bills.

# TRUSTEE'S RESPONSIBILITIES



- Who verifies funds for fund raisers? (Sec. 915)
- Auxiliaries and other levels shall not solicit funds or donations except by prior vote. No Auxiliary shall be permitted to solicit funds or donations by employing, in part or in whole, fundraising organizations or individuals, without the prior approval of the Auxiliary Department Council of Administration.
- Typically a Chairman is appointed by the President to oversee conducting the fundraiser. The President and Treasurer should be involved in the verifying the funds for the project and ensuring funds are deposited.
- President and Treasurer are BONDED positions. Trustees are then responsible to ensure that the funds which were said to have been collected show up in the accounts correctly.





# SECRETARY'S RESPONSIBILITIES



- You have been appointed Secretary by your Auxiliary President.
- She has faith in you that this important position you will carried out properly.
- As such, you need to learn your responsibilities!
- This is meant to assist you in understanding your role. Review the By-Laws as well.

# SECRETARY'S RESPONSIBILITIES



- Secretary's Duties and Responsibilities. The secretary shall keep in books or files
- The current bylaws of the auxiliary and standing motions
- A record of all the minutes of each meeting of the auxiliary in a three ring binding, printed from a computer.
- A General Information file for the current year in which shall be preserved all orders and circulars issued by the National and Dept. HQ in the order in which they are received.
- A letter file in which shall be kept all correspondence of the Auxiliary. General correspondence to be retained for one year; policy and rulings to be maintained in a permanent file. All communications from national or Dept Officers are official and shall be read at a meeting before being filed.

# SECRETARY'S RESPONSIBILITIES



- A roll of deceased members with a record of their burial
- A record book in which shall be kept the names of rejected applicants and expelled members
- The aux. Secretary shall send the names of the Delegates and Alternates to the National Secretary prior to the National Convention.

# SECRETARY'S RESPONSIBILITIES



- **Delegates** – Delegates for the District need to be elected more than 30 days prior to the District Encampment (typically election in March). Dept. and National Delegates are typically elected at the April meeting (again, more than 30 prior to the Dept. Convention).
- District delegates form is filled out and send to the District Secretary immediately following the election. Dept. delegates form is filled out and sent to the Dept. Secretary and the Dept. delegate fee, with a copy of the delegate form, is sent by the Aux. Treasurer to the Dept. Treasurer.
- National Delegates are entered online. If any national delegates are going to attend the National Convention, they typically go online and pay the delegate fee themselves. Secretary is to keep a copy of all the delegate lists.
- **The delegates' term begins immediately upon election as they will be the ones who will be voting at the upcoming conventions within the next few months.**

# SECRETARY'S RESPONSIBILITIES



- **Warrant** – To date, the warrant had to be requested from the Dept. Secretary regarding installation of officers.
- However, in the future (probably for the 2018-2019 year) this will change. The Dept. Secretary will be in touch with the Presidents and Secretaries as soon as National provides the new form.
- Be aware that the new procedure will probably be that all officers and all chairmen will need to be entered into MALTA by the auxiliaries. Dept. Secretary will be more happy to assist if needed.

# SECRETARY'S RESPONSIBILITIES



- You attest to all actions of the Aux and attend to all matters of correspondence under the direction of the President.
- All communications of any nature intended for consideration of the National Body shall be signed by the President and forwarded by the Secretary of the Aux. to the Dept. President.
- All official communications to National Officers from the Aux. must also be forwarded through the Department.
- Notify orally or in writing all newly elected members and shall under the direction of the President, prepare all reports required.

# SECRETARY'S RESPONSIBILITIES



- **Meeting protocol** - The Secretary calls the roll of officers at each meeting as the Conductress responds “present” or “absent” on their behalf.
- President will ask the Secretary if there are any petitions for membership. You and the President should have had this conversation prior the meeting so that you are away if there are any petitions. If there are any, you will reach the names of the applicants.
- The President will instruct you to notify the applicant(s) to present themselves for initiation at the proper time.



# SECRETARY'S RESPONSIBILITIES



- Utilize the “Blank Contemporary Meeting Agenda” as a basis to take your notes from. Located on the [nhvfwaux.org](http://nhvfwaux.org) website under “Dept. Officers”, “From the Secretary” under Misc.
- You will be asked to stand and read the minutes of the previous meeting. If there are any corrections, make them so that minutes are an accurate reflection of the prior meeting.
- You will be asked to read any bills that may be presented.
- You will be asked to read any official or other communications. Either ones you’ve received yourself (General Information for instance) or ones given to you by the President to read. Always check with the President to see if a piece of communication is required to be read prior to the meeting.

# SECRETARY'S RESPONSIBILITIES



- Can minutes be handed out prior to the meeting? (Ref. Sec. 903)
  - Any part of the proceedings of any Auxiliary may be published if ordered by vote of the Auxiliary unless otherwise provided in these Bylaws.
  - The manner in which the minutes of the Auxiliary meetings are read, printed and/or distributed shall be at the discretion of the Auxiliary by vote of the membership. (Ref. Sec. 812)

# SECRETARY'S RESPONSIBILITIES



- **Audits** – Quarterly audits of the books are held.
- The Secretary should be present and bring her Secretary's book to the audit.
- If unable to attend, be sure that someone from the audit team (Trustees, Treasurer, perhaps the President might be present) needs to obtain the book to have at the audit.

# SECRETARY'S RESPONSIBILITIES



- **Inspections** - Inspections by the District President will take place at least annually of the Auxiliary.
- The Secretary's books need to be present during those inspections.
- This will be pre-arranged so that the inspector will have all the books they need available.

# SECRETARY'S RESPONSIBILITIES



- **Reporting** – You may be asked by the President to help her with entering reports of the committees into the on-line reporting system which you can access through the [nhvfwaux.org](http://nhvfwaux.org) website under “Tools – Reporting Login”.
- **THIS IS EXTREMELY IMPORTANT!!** All the effort the Auxiliary does under all the programs needs to be reported to the Department in order for those numbers to be sent to National and included in the totals throughout the world. It is a very important part of the Auxiliary responsibilities.

# MEMBERSHIP ENGAGEMENT



- See additional slides.