Engage your members through training

By David F. Wallace (VA)
American Legion Post 180

Engagement: The Key to Membership Retention and Growth

We get a lot of new members … but we lose a lot too. Retention is key to growth, however, engagement is critical to retention. We see plenty of Legionnaires out there bringing in large numbers of new members, but what was their true engagement like after they brought them in? Was there any additional interaction after that new member signed their name to become a Legionnaire? What is your engagement like with the “seasoned” Legionnaire?

We need to treat members and prospects as our customers. We need to learn why members join and what they want from their American Legion experience. Think “value” – give members the opportunity within the Legion to further their passions.

To engage your membership or prospects, you must wear different hats. You need to become an artist, a scientist, a technologist and a marketer.

As the artist, you are either creating a landscape of what The American Legion is to the new member or painting a new picture of why someone should transfer to your post, renew or continue to be part of the American Legion Family.

As the scientist, you are learning how to handle diverse types of personalities that you come in contact with. You have to learn how to read body language and come up with an approach...

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About this newsletter

This periodic and Legionnaire-driven newsletter, produced by the Internal Affairs & Membership Division, is designed to address best practices, ideas and training that every Legionnaire needs to know to engage our membership through effective training now and into the future.

Highlighting new training ideas and resources becoming available in 2019 and beyond, it will also feature essays from successful leaders and training ideas of posts, districts, departments and individuals throughout The American Legion.

Are you a trainer? A writer? We need your submissions! Send your training ideas and articles to train@legion.org.
Engage your members through training

(similar to a hypothesis) to how you are going to answer their questions.

As the technologist, you are utilizing a variety of social media platforms to engage with your members. Are you actively corresponding through email? Is your post’s website up-to-date? Do you have a newsletter? Start with the simple things like sharing a photo of the new member on your post’s Facebook page. Ask your membership to follow on all social media platforms that you use (Facebook, Instagram, Twitter, etc.)

As the marketer, you are engaging your community. Does your community know about post events? Do you have a presence on their social media platforms? Don’t forget the old school method of creating flyers, press releases, or printing out a few extra copies of your post newsletter to distribute to public places such as the library. Do you network within your community to include your local officials? Do you wear your American Legion cap to community events to represent your post and the organization as a whole?

Membership will choose to engage because of how you make them feel and how they feel as a result of engaging with you. Through engagement, you will change the culture of membership. Focus on how to deepen the relationships you have with your membership and understand that engagement is critical for growth and success at all levels of The American Legion. Take these basic concepts and create an engagement strategy that is tailored for your post and your membership. Be that change agent we need to bring back excitement in membership. We need “fire in our bellies.”

David Wallace, a member of Dyer-Gunnell Post 180 in Vienna, Va., is the Media and Communications chairman for the Department of Virginia and is a 2016 National American Legion College graduate. He served as a facilitator for the 2018 Legion College class in October at National Headquarters in Indianapolis.

Ready to Engage (Train)

CHECKLIST

- Most recent approved script?
- Most recent appropriate presentation?
- Helpful handouts?
- Appropriate attire?
- Your current American Legion cap
- Winning SMILE

FIND IT ONLINE: myLegion.org is a FREE website designed to connect members of The American Legion to their post and department leadership.
By Bob Sussan (VA)
American Legion Post 177

Best Practices

In our previous column, we discussed the importance of audits and the fact that it is prudent to perform audits on an annual basis. A good starting point is a check of your guiding documents, including the constitution and bylaws of your post and/or department to see what types of audits are mentioned and what frequencies are called for.

A constant internal audit, performed by an established committee with the results reported to post leadership and membership, is a good business practice. An outside audit may be done less frequently, depending on the size and complexity of your operation, but in any case, should be performed every two or three years.

An understanding of how your finances are organized and what you expect from your audit should be discussed in detail with the firm you are engaging to perform the audit.

I have heard from many post officers that they are not accounting professionals with this type of business expertise, and that they struggle to ensure that post operations are properly run. Every year, thousands of dollars likely move in and out of your post’s bank account. The finance officer oversees all this activity, but the entire executive board has a fiduciary responsibility for proper stewardship of the funds to ensure that finances are is being handled properly and to report to the membership on a monthly basis the status of the organization’s finances.

There are many computer programs available to assist in tracking your daily finances, checks, deposits and funds transfers. You should consult with your accountant and decide what program would best suit your needs and situation. It is always a good idea to have a manual or paper system in place and well documented before attempting to implement a computerized system.

At the end of every year, facilitating an audit of your financial records is simplified when good record keeping practices and documentation are in place. In this context, an audit is simply a detailed review of your financial records rather than the formal legal certification of books that major corporations perform.

An audit committee for an internal audit should consist of three to five people who have not had access to the checkbook or bank account. Because questions can arise about the details of the post’s operations, it can be helpful to include an officer as a member of the committee. The finance officer should be available to answer questions but should not be part of this committee in order to preserve its independence.

The following are some general guidelines that can assist in fulfilling your fiduciary obligation as a post officer to your members and the community that you are involved in.

- Annually, you should prepare an operating budget that is presented to and approved by the general membership. This budget will not only include your income...

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Post operations best practices

streams and various related expenses but also your annual planned donations.

* There should always be two signatures on all checks. (Many banks will tell you that this is not required but when you set up the account advise them that your organization requires this.)

* Never pre-sign or sign a blank check.

* Make sure that the check that you are writing, and signing, is a properly authorized expenditure. Was it approved by the membership? Do you have a copy of the minutes so stating? Do you use check request forms and are the proper signatures or authorizations attached to that document?

* Reconcile your bank checking account statement every month. Never have the person who either writes the checks or enters the accounting information in the computer be the only one who reconciles the monthly statements.

* There are normal operating expenses that occur monthly and are paid monthly. These items might not be mentioned specifically in the minutes of a meeting but should be included in your annual budget.

* There should be a provision and procedure in your post’s documents to process payments for emergency repairs.

* When making deposits into your account, try not to combine various types of deposits on one deposit slip. For example, you might have some monies from a raffle, from the sale of an item, from a donation and from a member toward a memorial or membership. These should be either on separate deposit slips or clearly delineated on the deposit slip so that in the future you have a good, clear “audit trail” of the monies deposited.

* And finally, all bank account statements and related mail should be sent to the post address or post office box and not to the home address of a post office or member.

In the next installment of this series we will look at what you should do when anomalies are found in the finances and what steps you should take to find the source of the problem and correct it.

Bob Sussan of Fairfax, Va., is a past 17th District commander, Post 177 commander and department membership chairman and historian. He is currently the chairman of the National American Legion Riders Advisory Committee.

Financial Safeguards

⇒ Embezzlement is a crime of opportunity
⇒ Checks and balances
⇒ Require written financial reports
⇒ Ask questions
⇒ NEVER SIGN A BLANK CHECK!
National training under development

ALEI now stands for “American Legion Education Institute,” the forthcoming package of advanced American Legion online coursework for Legion Family members and youth program participants. The expanded ALEI will soon offer online training, YouTube videos, LEAD training videos, lesson plans for department instructors, and assistance for department Legion Colleges.

American Legion Basic Training — only the first step. The former American Legion Extension Institute (ALEI) course was renamed to “Basic Training” to indicate it is the first step of training. The original ALEI was an American Legion correspondence course designed decades ago to give members a history and description of the organization. The new Basic Training course is better defined as an introductory training course within the American Legion Extension Institute (now the new ALEI) explaining our mission, history, programs and basic skills. It is the anchor course for future training under ALEI. Basic Training is available now and is free at www.legion.org/alei.

“P.R.I.M.E.” courses will follow Basic Training. Five categories of online courses enhance the initial basic course and provide future leaders with more advanced tools and knowledge to effectively manage and operate a post. Course development has already begun on these future modules.

POST
- Why were posts formed originally?
- How are posts organized?
- How are post operations managed?
- How can a post be successful?

ROLES
- Who are the leaders?
- What are their responsibilities?
- What are post committees?
- How can we run effective meetings?

IMPROVE
- Identify post strengths and weaknesses.
- Develop post missions and core values.
- Evaluate post activities as a reflection of values.
- Develop and follow through with a plan.

MEMBER
- Identifying and attracting new members.
- Promoting The American Legion.
- Retaining our members.
- Demonstrating our values through activities and programs.

ENGAGEMENT
- Sharing the vision with members and community.
- Powerful communication.
- Electronic media best practices.
- Job fairs and open houses.
- Legion Colleges.

PRIME courses will become available to members after successful completion of Basic Training. Students will be able to pick among any of the courses offered, and are credited for each course or for the entire series when completed. PRIME will be augmented with online training tutorials, YouTube videos, and lesson plans and presentations made available for peer- and instructor-led training, post, district and department training, and Legion colleges.
Stay updated on American Legion training

Training in The American Legion has taken on a new focus and the national website reflects that renewed focus.

Look for new content coming in 2019 at

www.legion.org/training

American Legion National College Class of 2019

November 3-8, 2019

Visit http://www.legion.org/college for more information about the National American Legion College, now in its 20th year. Applications and selection process will be launched in the spring of 2019.

Interested in attending? Contact your post and department commanders.

Encourage your fellow Legionnaires to take BASIC TRAINING. Just send them to http://www.legion.org/alei

Training Events Calendar

is now active! Check out http://www.legion.org/training/events for training events in your area.

Are you a department or district trainer and want your event on this calendar?

Add it today!

Don’t see the training you know should be there? Contact your department training team and ask them to add the training event to the national calendar.

Upcoming Issue Topics:

* Membership Engagement
* Post Best Practices
* A Culture of Membership