Engage your members through education

Membership: MyLegion.org Member Account Training

By Richard Pushies (CA)
American Legion Post 66

It’s a smart idea for posts to include training on the MyLegion.org member accounts. The benefits of a member account are worth understanding. Accurate and up-to-date member information is important for any organization. This is becoming more and more important every day when it comes to making membership dues payments easier to help improve member retention and to ensure an accurate e-mail address is on file.

Legionnaires are fortunate because we can take an active role in keeping our personal information updated 24 hours a day, 7 days a week, with a member account in the MyLegion.org members-only web portal. This is a powerful tool for all our Legionnaires.

It’s important to have a current e-mail address on file for all our Legionnaires. Currently, it is estimated that over 200 billion e-mails are sent every day in America, with expectations for this number to grow to over 250 billion. Communication via e-mail is expanding because e-mail can be sent quickly and at a reduced cost than traditional print communication.

Keeping personal information up-to-date, ensuring a current e-mail address is on file and setting up an automatic online renewal option are all good things Legionnaires can do in a MyLegion.org member account. These are all good reasons to include the member accounts in MyLegion.org during training conducted at posts.

The following explanation of how to set up a member account and what can be done in the account could easily be adapted for a training handout.

Establishing a member account...

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in MyLegion.org is rather easy. To establish your account, visit the home page of The American Legion web site (www.legion.org) and click on the MyLegion.org link at the top of the home page.

Once your MyLegion.org account is created, in the "My Profile" option you can print a copy of your current membership card and edit your personal user profile. In the "Edit Profile" option Legionnaires can change their name, address, city, ZIP code, gender, date of birth, phone number, branch of service, war era and e-mail address.

Within the member account of MyLegion.org is a horizontal navigation bar. In addition to updating personal profile information in the "My Profile" option, Legionnaires also can subscribe to electronic newsletters, view past editions of The American Legion Magazine, make donations in the "Giving Made Easy" option, find out about special offers available to Legionnaires, and select dues payment options.

The dues Renewal Option within the membership tab allows you to set up an automatic online renewal for your membership dues. We highly recommend this automatic payment option.

Automatic online renewal is an easy and smart way to keep your dues current. It also has a very positive impact on member retention.

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- Honor those who served before
- Serve those here today
- Prepare for those who are yet to serve

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.
In our last article, I noted that this installment of the series would cover “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.” This is definitely an important step in the process, but perhaps a bit premature. Before digging into this topic, we need to look at what types of audits are available to a post, which type is applicable in each situation, and how these audits should be undertaken.

The initial question is whether the audit will be done internally by an independent audit committee or by an outside accountant or accounting firm hired to perform it.

**Internal audit**

If you choose to have your audit performed by an internal post auditing committee, this committee should have clear and concise instructions from the post’s executive committee and membership that all records, minutes, accounts and payment authorizations are made available to them. The committee should be totally independent and not composed of anyone that is a signatory on any of the post’s accounts.

**External audit**

If you plan to have your audit performed by an external accountant, certified public accountant (CPA) or accounting firm, you should be prepared to advise the entity you are hiring what you expect them to do and what you expect from the engagement. This is usually referred to as the “scope of services” or “statement of work.” This document should be crafted by your finance officer or Executive Committee and should be provided equally to all firms and/or individual CPAs you ask for a quote on the audit.

There are several important questions you should be able to answer clearly in order to provide the necessary information a CPA, or audit firm, will need to understand your requirements and to ensure you receive the type of results that will not only be what you need to fulfill your fiduciary duty to your members but also to provide an accurate status on the state of your post’s finances. And will also potentially identify problems or areas in your accounting that may need to be addressed, corrected or changed.

What type of accounting system do you use at your post?

Is it on a cash basis or accrual basis? Most posts operate on a cash basis.

Is it single-entry, double-entry, computerized or manual, or a hybrid?

Do you have a fixed asset register? As a nonprofit, this is...continued on next page.
Post operations best practices

not a requirement, but many posts do keep such a register to value purchased assets and schedule maintenance or replacement.

Are there specific concerns or processes at your post that you want the auditor to analyze and report findings on any irregularities or potential improvements that could be made?

Are you keeping track of your donors and the monies that they donate to you? As a non-profit, you are obligated to send acknowledgment of the donation to the donors for use with their respective tax filings.

More often than not, at a post level, you do not need a “GAAP Audit.” A GAAP Audit is one that is done in accordance with generally accepted accounting principles. These are well-recognized principles and procedures but they are usually applied to much more complex businesses that have a formal chart of accounts and a fairly sophisticated bookkeeping system.

Many posts that hire an outside CPA or accounting firm to conduct an audit do not give proper instructions at the outset and do not clearly state their expectations for the audit. The risk here is that you receive an audit report that does not address your important issues and that may be far more costly than you expect.

In a nutshell, whether you are having your audit done by an internal auditing committee or an outside entity, you simply need to tell them, in advance, how your organization and its finances are structured and what you are expecting out of the report.

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

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Financial Safeguards

- Embezzlement is a crime of opportunity
- Checks and balances
- Require written financial reports
- Ask questions
- NEVER SIGN A BLANK CHECK!

Are YOU a Trainer?

Have a hot training tip? We need your submissions! Send your training ideas to train@legion.org.

MISSING AN EDITION?

Go to http://www.legion.org/training/newsletters and read or download any past edition you are missing!
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.

District Training In A Box

To effectively implement District Training In A Box modules, departments should maintain a cadre of approved educators, subject matter experts, facilitators and trainers to develop members and progress the mission of the department through training. Graduates of National American Legion College and their department American Legion College are an excellent source for this group, but many could be qualified based on their knowledge or expertise on a particular subject or profession. Many essential presenters at national workshops are members of the Sons of The American Legion and the color of a presenter’s cover should never be an assumption of their ability to promote training in a department, regardless of their connection or association to the American Legion Family.

National Staff is developing training on the following topics:

**PHASE ONE** Projected Phase Completion Date: 2019 Fall NEC Meetings
- Membership Development / Retention, Post Adjutant, MyLegion.org, Membership Recruitment, Post Finance Officer, Leader Development, Post Commander and Post Service Officer.

**PHASE TWO** Projected Phase Completion Date: 2020 Spring NEC Meetings
- Post Chaplain, Post Filing Requirements, Developing a Post Vision, Post Sergeant-at-Arms, Resolution Writing, Growing a Post, Running a Meeting, American Legion Etiquette/Protocol, Growing a Program, Food/Beverage Management, Helping Veterans and Their Families/Operation Comfort Warriors, Messaging to Your Community, Fundraising, Constitution/By-laws Best Practices, Mentoring

**PHASE THREE** Projected Phase Completion Date: 2020 Fall NEC Meetings
- American Legion Riders, Oratorical Contest, Scholastic Scholarship, Sons of The American Legion, Boys State/Nation, American Legion Baseball, Disaster Preparedness/National Emergency Fund (NEF), Scouting, Junior Shooting Sports, American Legion Foundations (Temporary Financial Assistance, Child Welfare Foundation and NEF), Youth Cadet Law Enforcement, Color/Honor Guard, Amateur Radio (TALARC), Junior Reserve Officer Training Corps

While this training has the word “district” in the title, success of this training initiative lies squarely on the shoulders of the department level of the organization.
The American Veteran
By Chuck Hampe (WV) Squadron 60

What is an American veteran, a question you might ask.

They are people who when called to duty did their best to perform their task.

The young men and women, most still in their teens, put on the service uniforms of soldiers, sailors and marines.

They fought for freedom in two world wars, in Korea and Vietnam.

They went wherever duty called to serve their Uncle Sam

Whether in the Pacific or over in Germany, the Asian jungle and now Iraq, when they came home they’d humble reply, “The real heroes didn’t come back.”

The eleventh of November we gather to remember, sometimes to pray, to honor these fine men and women for the price they had to pay.