

**American Legion Post 318  
2021-2022 Business Plan**



*Veterans Still Serving Our Comrades, Our Community, Our State, and Our Nation*

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## I. Our Vision

***“Veterans Still Serving Our Comrades, Our Community, Our State, and Our Nation”***

**Veterans** - The Members of Post 318

**Still Serving** – We continue working to ensure a positive impact on those we support.

**Our Comrades** - Our members and their families, other veterans and their families, active duty personnel and their families.

**Our Community** - The people, government and institutions of Anderson Township

**Our State** - The people, government and institutions of the State of Ohio

**Our Nation** - The people, government and institutions of the United States of America

## II. Our Mission

***American Legion – Anderson Post 318 is committed to the support of veterans, active duty military, their families and the Anderson Township community.***

## III. Roles & Responsibilities

### Overview

The purpose of this section is to define the roles and responsibilities of the Executive Committee, Post Officers, and Standing Committee Chairs. The intent of this section is to ensure that there is common understanding throughout the membership of what the individual roles are, and the responsibilities associated with each.

### Executive Committee (EC)

The government and management of Post 318 are vested in the Executive Committee (EC). It is responsible for hiring such employees as may be necessary; shall authorize and approve all expenditures as defined in the Post Constitution and By Laws; shall hear the reports of Post committee chairs; and generally, have charge of all responsibility and affairs of the Post.

The EC consist of three (3) representative categories; 1) **Elected Officers**, 2) **Commander Appointed Positions/Chairpersons**, and 3) **EC Appointed Positions**. The following provides a current list of each representative category.

**Elected Officers:** Commander, 1st Vice Commander, 2<sup>nd</sup> Vice Commander, Adjutant, Finance Officer, Chaplin, and Sergeant-at-Arms.

**Commander Appointed Chairpersons:** Americanism, Bingo, Capital Projects, Community Support, Events Coordination, Fundraising, Historian, House, Service Officer.

**EC Appointed Positions:** Assistant Adjutant, Assistant Finance Officer, Assistant Sergeant-at-Arms, Assistant Service Officer, Charities, Inc. Liaison, Corporate Statutory Agent.

### Marketing Committee

This committee was formed to bring the Events Coordination, Post Activities, Fundraising, Bingo, Internal/External Communications and the Finance Committees together to identify, research, coordinate, and implement marketing strategies to advertise and generate hall rental opportunities, fundraising events, and social activities. Since inception its mission has expanded to identify research and recommend to the EC for implementation, new revenue opportunities. Another primary goal of this committee is to optimize the advertising expenses associate with bingo, fundraising, events, and hall rentals. It is also responsible for all event pricing, except bingo.

## **Post Commander (Annually Certified)**

It shall be the duty of the Post Commander to preside at all meetings of the Post and to have general supervision over the business and affairs of the Post, and such officer shall be the Chief Executive Officer of the Post. The Commander shall approve all orders directing the disbursement of funds and shall make an annual report covering the business of the Post for the year, and recommendations for the ensuing year, which shall be read at the June meeting and a copy thereof immediately forwarded to the Post Adjutant. The Commander shall perform such other duties as directed by the Post. Other responsibilities of the Commander include, but are not limited to:

- Appoints chairpersons for each of the Post's standing committees.
- Supervising the duties of all Post Officers and Chairpersons.
- Presents appointments for vacant Post Officer Positions to EC for approval and to the Post Membership for ratification.
- Organizes and chairs all Executive Committee meetings.
- Organizes and chairs all General Membership meetings
- Plans Post operations for the program year and is responsible for the success or failure of all Post programs.
- Sets the Calendar of Events
- Oversees the Post service programs and makes changes as necessary
- Being familiar with the policies and traditions of Post 318 and the American Legion
- Overall responsibility for the records of the Post
- Ensuring there is a balance between service and recreational activities
- Heads the "Welcome Committee"
- Represents the Post at all meeting of the Hamilton County Council
- Represents the Post at all meetings and conventions of the 4<sup>th</sup> District
- Represents the Post at the Department of Ohio Conventions

## **1<sup>st</sup> Vice Commander(Annually Certified)**

The 1<sup>st</sup> Vice-Commander shall assume and discharge the duties of the office of Commander in the absence or disability of, or when called upon by the Post Commander. Other responsibilities of the 1<sup>st</sup> Vice Commander include, but are not limited to:

- Chairs Membership Committee (see Standing Committee Responsibilities)
- Manages the Post's annual membership drive
- Manages all membership contact information
- Assist the Commander in conducting the monthly general membership and EC meetings.
- Represents the Post at meetings of the Hamilton County Council at request of, or in absence of Post Commander.
- Represents the Post at meetings and conventions of the 4<sup>th</sup> District at request of, or in absence of Post Commander.

## **2<sup>nd</sup> Vice Commander**

The 2<sup>nd</sup> Vice Commander assists the Commander with all duties. He/she should be interested in developing Post activities, and in the entertainment features which mark all meetings. The 2<sup>nd</sup> Vice Commander should help to observe strict tolerance among Post members on all political, religious and civic matters. Other responsibilities of the 2<sup>nd</sup> Vice Commander include, but are not limited to:

- Chairs the Post Activities Committee (see Standing Committee Responsibilities)
- Oversees the planning, organization and promotion of the Post's activities and social events.
- Oversees and coordinates, with Chairs of Membership / Americanism / and Community Support Committees, the planning of the Post 318's Annual Awards and Recognition Event.
- A member of the Post Marketing Committee working in concert with Fundraising and Events Coordinator Chairpersons in support of membership participation associated with Post events (i.e. dinners, dances, other events).
- Arranges for light snacks and beverages associated with Post meetings, the Annual Awards and Recognition Event, and other organization meetings of the American Legion held at the Post.



- May be requested to attend and represent Post at meetings of Hamilton County Council or 4<sup>th</sup> District at request of, or in absence of Post Commander or 1<sup>st</sup> Vice Commander.

### **Adjutant (Annually Certified)**

The Adjutant shall have charge of and keep a full and correct record of all proceedings of all meetings, keep such records as the Department and National Organizations may require, render reports of membership annually or when called upon at a meeting, and under direction of the Commander handle all correspondences of the Post. Other responsibilities of the Adjutant include, but are not limited to:

- Chairs the Internal / External Communications Committee (see Standing Committee Responsibilities)
- Maintains membership records in cooperation with membership Chairperson
- Records and maintains Post and Executive meeting minutes, or specially called meeting minutes of either body.
- Publishes and posts official orders, announcements, instructions, and various articles of correspondence as necessary.
- Maintains custody of all Post records
- Maintain a copy of the Post Adjutant's Manual
- Has primary access to the Post mailboxes

### **Assistant Adjutant**

The Assistant Adjutant shall assume and discharge the duties of the Post Adjutant in the absence or disability of the Post Adjutant, or shall assist the Post Adjutant as called upon to do so.

### **Finance Officer (Annually Certified)**

The Finance Officer of the Post shall have charge of all finances and see that they are safely deposited in some local bank or banks and shall report once a month to the Executive Committee the condition of the finances of the Post, with such recommendations as may deem expedient or necessary for raising funds with which to carry on the activities of the Post. The Finance Officer shall sign all checks distributing the monies of the Post, and shall furnish such surety bonds in such sum as shall be fixed by the Post Executive Committee. Other responsibilities of the Finance Officer include, but are not limited to:

- Chairs the Finance Committee (see Standing Committee Responsibilities)
- Maintains financial books and prepares reports
- Writes all checks and secures the Post Checkbook
- Performs "Cash Management" functions associated with all events.
- Manages all funds used by the Post as "Petty Cash".
- Secures CD's and other investment vehicles, or documentation.
- Has signing authority associated with all Post banking accounts.
- Calculates and pays monthly state sales/use tax.
- Oversees Post investments.
- Responsible for consolidating all Post financials (Post Accounts, Bingo, Scouting, and JSSP).
- Leads the Post's effort in completing tax returns and other financial reporting forms (i.e. Annual IRS 990).

### **Assistant Finance Officer**

The Assistant Financial Officer shall assume and discharge the duties of the Post Finance Officer in the absence or disability of, or when called upon by the Post Finance Officer. Other responsibilities of the Assistant Finance Officer include, but are not limited to:

- A member of the Finance Committee
- Has signing authority for Post banking accounts
- Knows how to gain access to the Post mailbox
- Shares responsibility with the Finance Officer for maintaining Post financial books and preparing reports.
- Assist the Finance Officer with preparing tax returns and other financial reporting forms (i.e. Annual IRS 990)

### **Post Chaplain (Annually Certified)**

The Post Chaplain shall be charged with the spiritual welfare of the Post comrades and will offer divine but nonsectarian service in the event of dedications, funerals, public functions, etc., adhere to such ceremonial rituals as are recommended by the National or Department Headquarters from time to time. Other responsibilities of the Post Chaplain include, but are not limited to:

- Chairs the Visiting, or Veterans Administration Voluntary Services (VAVS) Committee (see Standing Committee Responsibilities)
- Provides moral and intellectual leadership within the Post
- Leads the Posts efforts to stay in touch with our members who are infirmed or are in Senior or Assisted Living centers.
- Cooperates with the Post Historian on graves registration work

### **Sergeant-At-Arms**

The Sergeant-At-Arms shall preserve order at meetings and shall perform such other duties as maybe from time to time assigned by the Post Executive Committee. Other responsibilities of the Sergeant-at-Arms include, but are not limited to:

- Chairs the Uniformed Ceremonies Committee (see Stand Committee Responsibilities)
- Custodian of the Post Armory – Responsible for conducting and maintaining an inventory of all weapons in custody of the Post, and for the routine maintenance and security of all weapons in the custody of the Post.
- Oversees the Post Honor Guard, Color Guard and Rifle Squad to insure sufficient personnel and proper ceremonial equipment. He/she also maintains the inventory of such equipment.
- Determines if there is a quorum to conduct a Post General Membership meeting.
- Contacts other veteran and civic groups so that each patriotic holiday and observance receives the attention it deserves.

### **Assistant Sergeant-at-Arms**

The Assistant Sergeant-at-Arms shall assume and discharge the duties of the Post Sergeant-at-Arms in the absence or disability of, or when called upon by the Post Sergeant-at-Arms. Other responsibilities of the Assistant Sergeant-at-Arms include, but are not limited to

- A member of the Uniformed Ceremony Committee
- The Flag etiquette authority within the Post
- Custodian of the Post Colors – Responsible for the color detail:
- Participates in all Uniformed Ceremony events, when available.

### **Service Officer (Annually Certified)**

The Post Service Officer is responsible for bringing to the attention of all veterans and their dependents the rights and benefits granted them by law. The Service Officer must also know how to utilize the expert services available to veterans through Legion channels, as well as those other agencies in his community. Other responsibilities of the Service Officer include, but are not limited to:

- Chairs the Service, Veterans Affairs, Economic & Legislative Committee (see Standing Committee Responsibilities)
- Maintains a working knowledge of how to obtain forms and other support resources to assist veterans in obtaining their rightful benefits.
- Assist members and their families applying for veteran benefits
- Assist Veterans and/or their families in need
- Maintain an awareness of current DOD and VA policy changes that affects members.
- Maintain stocks of documents on Legion, Dodd and VA benefit programs for distribution to new members.

### **Assistant Service Officer**

The Assistant Service Officer shall assume and discharge the duties of the Post Service Officer in the absence or disability of, or when called upon by the Post Service Officer. Other responsibilities of the Assistant Service Officer include, but are not limited to:

- Participate in formal training sessions.

- Assist Service Officer on active cases
- Perform other tasks as the Service Officer may request

### **Post Historian**

The Post historian shall be charged with the individual records and incidents of the Post and Post members, and shall perform such other duties as may properly pertain to the office as may be determined by the Post or the Executive Committee. Other responsibilities of the Post Historian include, but are not limited to:

- The gathering and preservation of historical records and artifacts
- Capturing the biographies of Post members
- Submitting appropriate records to local libraries and Department archives
- Maintaining relationships with other Post Historians and have a working knowledge of what they're doing
- Providing an annual report to the Department Historian just prior to the Department convention

### **Corporation Statutory Agent**

The Corporation Statutory Agent shall assure that the Post's State of Ohio "non-profit corporation" status is maintained in effect and in compliance with the Ohio Secretary of State and Attorney General requirements for a "non-profit corporation". Responsibilities include, but may not be limited to:

- Maintaining information as to Post 318's designated Statutory Agent current with the Ohio Secretary of State's (SOS) office.
- Timely filing of required "continuing existence status" form with SOS at specified five (5) year intervals.
- Timely filing of Annual Reports with the Ohio Attorney General's (AG) office.
- Contact with respective State of Ohio agencies on all matters regarding the corporation.
- Coordinates with any Post Officer or Standing Committee Chair where corporation matters may impact.

The Corporation Statutory Agent shall be designated for a continuous appointment by the majority vote of the Executive Committee. And shall serve until his/her request to be relieved of the position, or is directed to be removed from the position by a majority vote of the Executive Committee. Any change of the Corporation Statutory Agent is required to be timely filed with the SOS and requires a filing fee. Position of Corporation Statutory Agent will not prohibit designated individual from also serving as one of the other elected or appointed Post Officers or as chairperson of one of the Standing Committees. A Corporation Statutory Agent serving in more than one position within the Executive Committee shall still only be allowed one vote.

### **Charities, Inc. Liaison**

American Legion Post 318 Charities, Inc. (CI) is a non-profit 501(C)3, Public Charity. It was formed as an independent corporation to take advantage of existing tax law and manage the charitable giving associated with American Legion Anderson Post 318. The Charities, Inc. Liaison shall support charitable fund raising by overseeing or managing fund raising projects. He/she also oversees and develops the processes and mechanics necessary for Post 318 and CI. to handle financial transaction in a smooth and effective manner. To accomplish this purpose the CI Liaison will interact with the Executive Committee, various Standing Committees, Program Chairs/Leaders, and the Finance Officer/Finance Committee. President of American Legion Post 318 Charities, Inc. would serve as liaison with concurrence from the Post Executive Committee. Responsibilities of the CI Liaison would include but are not limited to:

- Develop and provide to Post 318 an annual charitable giving budget to support IRS approved programs. This budget would include both projected funding and expenditures.
- Coordinate between Post 318 and Charities, Inc. to develop and implement necessary processes for handling the transfer of funds between the corporations and the payment of expenses incurred in support of approved programs.
- Coordinate fund raising activities, including volunteer support, between the corporations.
- Provide a monthly Income/Expense report to both the Post Adjutant, and Finance Officer that itemizes the charitable giving conducted by Charities, Inc.

## **Standing Committee Chairs (Various)**

The Standing Committee Chairs have overall accountability for the roles, responsibilities, programs, and projects defined within the scope of his/her committee. Each Chair person's primary role is to provide oversight management of the committee he or she heads. Other responsibilities of the Standing Committee Chair include, but are not limited to:

- Chairs standing committee meetings (see Standing Committee Responsibilities)
- Provides a monthly report to the Executive Committee as to the status of all committee owned projects and programs. This report should be reduced to writing for distribution to our membership.
- Provides annual budget information for projects and programs to be supported by his/her committee.
- Looks for new committee projects or programs to submit to the Executive Committee for support consideration.
- Assigns program/project tasks to committee members
- Names program/project leads within his/her committee.
- Assures the successful planning, organizing, and implementation of committee programs and projects.
- Personally, takes ownership of a project or program, if required.
- Mentors and provides experienced based direction to committee members
- Sets up a communication process within his/her committee to keep committee members informed.

## **IV. Post Committees**

### **Overview**

The purpose of this section is to identify the committees that should exist within Post 318. The intent of this section is to ensure that there is an ownership assignment for every project the Post undertakes. This section has been organized by creating a statement of purpose for each committee, followed by a description of the programs each committee should support, or the responsibilities each committee should own and the committee's goals & objectives. Any program expense, or income information, will be found in either the "Financial Plan or Charitable Giving Sections" of this document.

### **Americanism Committee (Programs Aligned with Local Schools)**

**Chairperson:** Open

**Purpose:** This committee acts as a liaison between Post 318 and the Forest Hills School District, its affiliated schools, and McNicholas High School. Its role is to facilitate the delivery of American Legion programs intended to inspire patriotism and good citizenship through observances, patriotic and civil instruction in schools, Americanization of aliens, information on anti-American propaganda, and youth activities such as Boys State, Girls State, School Award Medals, and other similar school programs. Provides data on various program participants, as required, for recognition at Post 318's Annual Awards and Recognition Event

#### **Goals & Objectives:**

- Conduct an annual program review with the Superintendent of Schools, by August 31.
- Conduct an annual program review with the Principals of AHS & THS, by September 15.
- Meet with teachers and staff at Anderson HS to review Buckeye Boys State, and Buckeye Girls State Programs.
- Build a relationship with Dave Kammerer (Vice Principal)
- Meet with students from the HOBY Program in December.
- Interview Buckeye Boy State / Buckeye Girls State candidates in February
- Identify a minimum of three (3) Buckeye Boys State & three (3) Buckeye Girls State Candidates, by March 1<sup>st</sup>.
- Identify at least two (2) alternates for the Buckeye Boys State and Buckeye Girls State Programs.
- Meet with AHS Social Studies Coordinator (Bill Meltebrink) to ensure that A&G Tests will be delivered the 1<sup>st</sup> week of November to all eligible AHS students.
- Order A&G Tests by the 1<sup>st</sup> week in October.
- Ensure test are graded and returned to Post 318 by December 1<sup>st</sup>.
- Notify Hamilton County Council of Post 318 winners.
- Maintain the mentoring program for Post 318 oratorical candidates.
- Obtain and distribute Oratorical Contest materials to AHS & THS, in a timely manner.
- Identify at least one (1) Oratorical Contest candidate from each of the FHSD high schools.
- Administer our "Veteran Scholarship" program to deliver \$3000 in scholarship awards to the children, or grandchildren, of Post members, or students of qualified veterans who attend Anderson, Turpin & McNicholas High School.
- Coordinates with 2<sup>nd</sup> Vice Commander in planning of Post 318's Annual Awards and Recognition event., and provides data regarding participants for recognition.

#### **Programs Supported / Areas of Responsibility:**

##### **Americanism & Government (A&G) Test Program**

**Program Lead:** Open

**Program Description:** The Americanism and Government Test is a joint program of The American Legion and American Legion Auxiliary. The testing always takes place the first full week of school in November. The names, and test papers, of Post winners, one young man and one young woman, from grades 10 thru 12, must be turned into the County Commander by December 1<sup>st</sup>. The same method is used to determine Post, County, District, and State Winners. The top eighteen (18) state winners earn an all-expense paid trip to Washington D.C. and Gettysburg.

An Americanism Packet will be sent to the Chairman and/or the Commander in September and all tests must be ordered no later than October 15<sup>th</sup>. A fee of \$.10 per test will be charged with a minimum order of 100 or \$10.00. These fees are paid by American legion Post 318 Charities, Inc. Tests are shipped by UPS.

At the present time, Bill Meltebrink, (William.meltebrink@foresthills.edu) the Social Studies Chairman at Anderson HS, is our School Contact. In September, it is important to contact both the School Principal and the Coordinator to ensure that they are on board and are willing to do the test within our scheduled test dates. You must stay on top of the testing or it may be put on a shelf somewhere and forgotten.

**Program Implementation Date:** September - December of each year

### **American Legion Oratorical Contest**

**Program Lead:** Open

**Program Description:** The purpose of The American Legion High School Oratorical Scholarship Program “A Constitutional Speech Contest” is to develop a deeper knowledge and appreciation of the Constitution of the United States on the part of high school students. Other objectives of the contest include the development of leadership qualities, the ability to think and speak clearly and intelligently, and the preparation for acceptance of the duties and responsibilities, the rights and privileges of American citizenship. Scholarship awards are presented to the three finalists in the Final Round of the National contest as follows: 1st place - \$25,000; 2nd place - \$22,500; 3rd place - \$20,000. Each first round winner who advances to and participates in the second round, but does not advance to the Final Round, will receive an additional \$2,000 scholarship to pursue education beyond high school. Cash awards are also presented at the District, County and Post level. American Legion Post 318 Charities, Inc. provides \$ 500 in scholarships to Post 318 contest participants.

**Program Implementation Date:** Contestant should be identified by December 1<sup>st</sup>, of each year

### **Buckeye Boys State**

**Program Lead:** Paul Henkel

**Program Description:** Boys State represents a state and local government simulation and role play. It’s a five-day experience conducted at Miami University. Post 318 works with the staff at Anderson High School to select at least four (4) recipients each year. American Legion Post 318 Charities, Inc. pays the entrance fee and transportation for the selected winners. The Post also provides “Certificates of Recognition” and monetary awards for the boys selected. The process begins with the boys signing up at AHS. The Post then selects its candidates and alternates if possible, and submits their names to the Department of Ohio. The state then notifies each candidate with the Boys State program and orientation details. The AHS staff communicates program information back to the Post.

**Program Implementation Date:** November of each year

### **Buckeye Girls State**

**Program Lead:** Paul Henkel

**Program Description:** Girls State represents a state and local government simulation and role play. It’s a five-day experience conducted at a selected Ohio university. Post 318 works with the staff at Anderson High School to select at least four (4) recipients each year. American Legion Post 318 Charities, Inc. pays the entrance fee for the selected winners. Transportation to Girls State is handled each year on an individual case basis. The Post also provides “Certificates of Recognition” and monetary awards for girls selected. The process begins with the girls signing up at AHS. The Post then selects its candidates and alternates if possible, and submits their names to the Department of Ohio. The state then notifies each candidate with the Girls State program details. Girls State Orientation is then conducted via the internet. The AHS staff communicates program information back to the Post.

**Program Implementation Date:** November of each year

### **Educator of the Year**

**Program Lead:** Open

**Program Description:** Each American Legion Post is authorized to select an Educator of the Year. To be eligible, the nominee must be an Educator in any grade (K-12) in any public, private, or parochial school or academy in the State of Ohio recognized by the Ohio Department of Education. They must be endorsed by the Superintendent and Principal through letters of recommendation to be attached to the Nomination Form. The recipient of the Post American Legion Educator of the Year will be eligible to compete for recognition at the District level. The District winner will be eligible for recognition at the State level. The State winner will be presented with a suitable plaque at the American Legion State Convention and receive one (1) nights housing. American Legion Post 318 Charities, Inc. provides the funding for a Post award plaque and certificate.

**Program Implementation Date:** Posts should identify / select a candidate in January

### **Nagel Middle School Citizenship Program**

**Program Lead:** Open

**Program Description:** Anderson Post 318 representatives will work with the Social Studies Department at Nagel Middle School to design a program that will recognize 4 to 6 students in each of the Social Studies sections. The program criteria will be based on Patriotism, Leadership, and Citizenship. These students will be chosen by the Nagel Social Studies staff with input from American Legion Representatives, and each will be presented an award certificate from the American Legion. American Legion Post 318 Charities, Inc. provides funding for this program.

**Program Implementation Date:** May of each year.

### **School Liaison**

**Program Lead:** Open

**Responsibility / Program Description:** Meet with local school administrators, counselors, and teachers on a regular basis to build and maintain a close relationship between them and the American Legion Post 318. Look for and pursue new opportunities to promote Americanism and introduce new or existing American Legion programs into the Forest Hill School District.

**Program Implementation Date:** On-going

### **Veteran Scholarship Committee**

**Program Lead** Open

**Program Description:** Each year American Legion Post 318 Charities, Inc. provides \$ 3000 in scholarships. Based on the Scholarship Committee recommendations, this money can be divided equally and distributed to a maximum of 6 applicants. To be eligible the applicant must meet the following requirements:

- 1) The applicant must be the child or grandchild of an “Honorably Discharged” Veteran, or the child or grandchild of someone currently on Active Duty in the United States Military. This parent, or grandparent, will be referred to as the” Sponsor”.
- 2) The applicant must be a Senior in the current graduating class at Anderson, Turpin, or McNicholas High School, or attends another high school and have a “Sponsor” who is a member in good standing of American Legion - Anderson Post 318.
- 3) The applicant must complete a scholarship application.
- 4) The application must be received by American Legion – Anderson Post 318, by COB, April 30<sup>th</sup>.
- 5) A copy of the “Sponsor’s” DD214 must be submitted with the scholarship application. If the” Sponsor” is on Active Duty, a copy of their current orders can be submitted in lieu of a DD214.

The Post318 Veterans Scholarship Committee manages this program. They develop the scholarship questionnaire, review and evaluate the applications received, and award the Veteran Scholarships.

**Program Implementation Date:** January 1<sup>st</sup>, of each year

## **Bingo Committee**

**Chairperson:** Ed Sears

**Purpose:** This committee is responsible for planning, organizing, and managing the Post 318 “bingo” operations.

### **Goals & Objectives:**

- Organize and operate Sunday Bingo
- Order bingo and pull-tab supplies
- Maintain bingo records per Ohio AG specifications.
- Recruit Post Members or Friends of the Legion to participate in Post 318 Bingo Activities.

### **Programs Supported / Areas of Responsibility:**

#### **Bingo Sessions**

**Program Lead:** Ed Sears

**Program Description:** The Post operates “bingo” as a means for paying our bills. This endeavor consists of Type I (traditional ball bingo) and Type II (the sale of pull tabs during bingo sessions). Bingo will be conducted at the Post each Sunday evenings from 6 PM to 10 PM. At the discretion of the Bingo Committee additional sessions may be added. All advertising and bingo promotional events are at the discretion of the Bingo Committee Chairperson. However, these marketing activities should be coordinated with the Marketing Committee. 25 % of all revenues generated by Type II bingo must be directed to American Legion Post 318 Charities, Inc. to comply with Ohio Law. All remaining revenues can be retained by the Post.

**Program Implementation Date:** On Going

#### **Bingo Accounting**

**Program Lead:** Ed Sears

**Program Description:** The Bingo Accounting Lead is responsible for managing and accounting for all “bingo revenues and expenses”. He/she manages a stand-alone “bingo” checkbook in accordance with State of Ohio regulations and keeps financial records, including invoices and receipts, in accordance with accepted accounting practices. He/she also works closely with Finance Officer to ensure an annual audit and all annual tax filings are complete.

**Program Implementation Date:** On Going

#### **Bingo Supply Purchasing & Compliance**

**Program Lead:** Ed Sears

**Program Description:** The Bingo Purchasing Lead is responsible for the purchase of all “bingo supplies” and completing all of the necessary paper work to be in compliance with the State of Ohio regulations.

**Program Implementation Date:** On Going

#### **Bingo Licensing**

**Program Lead:** Ed Sears

**Program Description:** The Bingo Licensing Lead is responsible for completing all necessary paper work to keep the Post “Bingo Licenses” active.

**Program Implementation Date:** On Going

#### **Bingo Concessions**

**Program Lead:** Ed Sears

**Program Description:** The Post operates a concession stand associated with our weekly bingo sessions. The Bingo Concessions Lead is responsible for staffing this operation. All concession purchasing is the responsibility of the Fund-Raising committee.

**Program Implementation Date:** On Going



## **Capital Projects Committee**

**Chairperson:** Open

**Purpose:** The role of this committee is to Manage Capital Projects. These projects are intended to improve the physical infrastructure of the Post and go beyond what would be considered routine maintenance, which is the domain of the House Committee. This committee will define available options, solicit bids and then make recommendations to the executive committee on how to proceed with a capital improvement. When possible a minimum of two (2) bids should be obtained. It's also the responsibility of the *Capital Project Committee* to maintain all capital project records. Any known costs associated with these planned Capital Projects can be found in the "Financial Plan Section" of this document.

**Goals & Objectives:**

- Assume responsibility for new Capital Projects as identified.

**Programs Supported / Areas of Responsibility:**

**Obtain/Prepare Bids for Significant Post Improvements**

**Program Lead:** Open

**Description:** From time to time it becomes necessary to conduct major repairs on the infrastructure of our building. The Capital Project Committee is responsible for engaging professionals to assess required repairs/improvements and to solicit competitive bids for any work that needs to be done. The goal for any required repairs is to obtain a minimum of two (2) bids. However, three (3) or more bids would be preferred.

**Program Implementation Date:** As Required

**Oversee / Manage Approved Projects**

**Program Lead:** Open

**Description:** Once a Capital Project has been approved by the *EC*, the Capital Projects Planning Committee assumes responsibility for its implementation.

**Program Implementation Date:** As Required

## **Community Support Committee (Programs Aligned with Community or Government Organizations)**

**Chairperson:** Open

**Purpose:** This committee acts as a liaison between Post 318 and the Anderson Township Government, The Anderson Area Chamber of Commerce and other community organizations. Its role is to facilitate the delivery of American Legion programs intended to inspire patriotic values. It is also the responsibility of this committee to look for opportunities to support and recognize members of the Anderson Township Community. It is also their responsibility to identify and recognize the community Law Enforcement Officer, Firefighter, Civilian Life Saver, and Eagle Scout who has made a significant difference in the community over the program year. Provides data on various program participants, as required, for recognition at Post 318's Annual Awards and Recognition Event.

**Goals & Objectives:**

- Maintain our seats on the Anderson Township Veterans Memorial Steering Committee and continue support of, and participation in planning for, the Anderson Township Veteran's Memorial
- Maintain our seats on the Board of Trustees for Hillcrest Cemetery.
- Build on our existing relationships with the Anderson Township Government.
- Continue efforts to raise our visibility within the Anderson Township community.
- Develop Post Disaster Preparedness Plans and integrate with Anderson Township Fire and Hamilton County Sheriff Department, and maintain shelter agreement with Red Cross.
- Support activities and programs that benefit the Anderson Township community through other civic organizations that support veterans (EHEC, New England Club, etc.).
- Obtain candidates for American Legion Law Officer, Firefighter, and Civilian Life Saver of the Year.

- Coordinates with 2<sup>nd</sup> Vice Commander in planning the Post 318's Annual Awards and Recognition event, and provides data regarding participants for recognition.
- Locate a local Girl Scout Troop in search of a meeting place/sponsor.
- Continue active support of the scouting programs we're involved with.
- Survey our BSA troop and local troops to obtain a candidate for "Eagle Scout of the Year".
- Continue to use our membership in the Anderson Township Chamber of Commerce to build relationships with local business leaders.
- Participate in the Anderson Township 4<sup>th</sup> of July Parade.
- Recruit Post Members or supporters of the Legion to participate on the Post 318 Community Support Committee.

**Programs Supported / Areas of Responsibility:**

**Chamber of Commerce Liaison**

**Program Lead:** Open

**Program Description:** Post 318 is a member of the Anderson Area Chamber of Commerce. The responsibilities associated with this program are to learn how these relationships can be used to mutually support the goals and objectives of both Post 318 and the local business community.

**Program Implementation Date:** On-going

**Civilian Life Saver of the Year**

**Program Lead:** Dan Wolfangel

**Program Description:** Each year The Department of Ohio recognizes a Civilian Life Saver for his/her heroic actions within their community. Candidates are identified and nominated by local Posts. We will work with local law enforcement, Fire and Rescue and Mercy Health to identify a candidate. Submissions are made to the Hamilton County Council. Winners then move on for District and State recognition. Should the Post identify a recipient he, or she, would be presented a "Certificate of Recognition" and a plaque. American Legion Post 318 Charities, Inc. provides the funding for this program.

**Program Implementation Date:**

- Select or identify a Post candidate by January 1<sup>st</sup>.
- Prepare Department of Ohio Nomination Form by mid-January.
- Submit nomination form to Department of Ohio, via Hamilton County Council Law & Order Chairman, and / or 4<sup>th</sup> District Law & Order Chairman, in accordance with current year submission instructions and process.
- Submission schedules for the various levels, and the process for submission is subject to change annually.

**Community Liaison**

**Program Lead:** Open

**Program Description:** The purpose of this role is to actively engage with community and local government organizations to discover new opportunities to both increase Post 318 support within the community and raise the visibility of both the American Legion and our Post. The American Legion's Legiontown initiative, The Legion's Jr. Shooting Sports Program and Disaster Preparedness Programs would be a few ways of continuing this process.

**Program Implementation Date:** On-going

**Eagle Scout of the Year**

**Program Lead:** Joe Baker

**Program Description:** The American Legion annually honors **The American Legion Eagle Scout of the Year** at its National Convention. The winner of the competition receives a \$10,000 scholarship and the three runners-up each are awarded \$2,500 scholarships. Our goal is to submit a candidate into this competition annually and will strive again this year to find a suitable candidate.

**Program Implementation Date:** Posts should identify candidates during October/November and select a candidate in December

### **Firefighter of the Year**

**Program Lead:** Dan Wolfangel

**Program Description:** Each year Post 318 recognizes an Anderson Township firefighter for his/her contributions to the community. The Anderson Township Fire Department submits a list nominee's from which the Post selects its annual recipient. The post presents a "Certificate of Recognition" and a plaque. The recipient can further be submitted for selection and recognition by the Hamilton County Council, District # 4 and the Department of Ohio. The process begins when Post 318 contacts the Anderson Township Fire Chief. The "Firefighter of the Year" is recognized at our awards ceremony each July. American Legion Post 318 Charities, Inc. provides the funding for a Post award plaque and certificate.

**Implementation Date:** December

- Contact Fire Department for Post candidate selection by December 1<sup>st</sup>, and request response by January 1<sup>st</sup>.
- Prepare Dept. Of Ohio Nomination Form by mid-January.
- Submit nomination form to Dept. Of Ohio, via Hamilton County Council Law & Order Chairman, and / or 4<sup>th</sup> District Law & Order Chairman, in accordance with current year submission instructions and process.
- Submission schedules for the various levels, and the process for submission is subject to change annually.

### **Hillcrest Cemetery - Directors**

**Program Lead:** Don Bishop

**Program Description:** Hillcrest Cemetery is a private cemetery in Anderson Township. It has a significant number of veterans interred. Over the years this cemetery had fallen into disrepair. It was revitalized as a result of an Eagle Scout Project and a great deal of community involvement. Once restored Post 318 was asked to become involved with the long-term oversight. Don Bishop & Walt Geil agreed to take on this task, by becoming members of the Cemetery Board of Directors.

**Program Implementation Date:** As Required

### **Law Enforcement Officer of the Year**

**Program Lead:** Dan Wolfangel

**Program Description:** Each year Post 318 recognizes a law enforcement officer in Anderson Township for his/her contributions to the community. The Hamilton County Sheriff's Department submits a list nominee's from which the Post selects its annual recipient. The post presents a "Certificate of Recognition" and a plaque. The recipient can further be submitted for selection and recognition by the Hamilton County Council, District # 4 and the Department of Ohio. The process begins when Post 318 contacts the Hamilton County Sheriffs District Commander responsible for law enforcement within Anderson Township. The "Law Officer of the Year" is recognized at our awards ceremony each July. American Legion Post 318 Charities, Inc. provides the funding for this program.

**Program Implementation Date:** December

- Contact Sheriff's Office District 5 for Post candidate selection by December 1<sup>st</sup>, and request response by January 1<sup>st</sup>.
- Prepare Dept. Of Ohio Nomination Form by mid-January.
- Submit nomination form to Dept. Of Ohio, via Hamilton County Council Law & Order Chairman, and / or 4<sup>th</sup> District Law & Order Chairman, in accordance with current year submission instructions and process.
- Submission schedules for the various levels, and the process for submission is subject to change annually.

### **Red Cross Shelter**

**Program Lead:** Open

**Program Description:** The responsibilities associated with this program are; 1) to identify and maintain a contact within the Red Cross, 2) fully understand what their expectations are should they need to use our hall as a

shelter, and 3) ensure that everyone's expectations are met. We will also work with them on the new Disaster Preparedness Program to be implemented this year.

**Program Implementation Date:** As Required

**Scouting (Cub Scouts, Boy Scouts, Girl Scouts and Crew)**

**Program Lead:** Joe Baker

**Program Description:** Scouting represents an opportunity to teach leadership and responsibility to young men and women. Post 318 currently is the charter sponsor of Boy Scout Troop 519, Crew 519 and Cub Scout Pack 405. We provide a meeting place, a storage area, and an opportunity for participation in Post 318 projects and events. American Legion Post 318 Charities, Inc. pays any annual re-charter fees that are assessed. It may also provide other financial support, if required. Members of Post 318 support and participate in the scouting activities, such as Flag Retirement ceremonies, the July 4<sup>th</sup> Parade, and as Merit Badge Counselors. The Post is seeking a Girl Scout unit to support.

**Program Implementation Date:** On Going

**Veterans Memorial Steering Committee**

**Program Lead:** Don Bishop

**Program Description:** Post 318 is partnering with The Anderson Township Government, The Forest Hills School District, and The Anderson Township Park District to design and build a memorial to Anderson Township Veterans who have served our country. This committee also works together on community events that support the Veteran Community such as a Veterans Day Program, a Memorial Day Program, and fund-raising events to complete the memorial.

**Program Implementation Date:** As Required

**Events Coordination Committee**

**Chairperson:** Ken Knight

**Purpose:** To market, promote and contract with the public for use of the Patriot Center and other Post facilities, except the Club Room. To coordinate with other Post 318 committees, Post Activities, and Fundraising, to schedule Post events.

**Goals & Objectives:**

- Identify strategies and marketing plans for maximum utilization of Post facilities for increased revenue.
- Actively manage hall rental calendar, in coordination with Post Activities, and Fund-Raising Chairs to insure maximum hall utilization.
- Ensure payment of Rental Fees in a timely manner
- Coordinate with other Post members and place beverage orders (beer, wine, liquor, and soft drinks) in a timely manner
- Update hall rental policies, strategies, and rental rates, as appropriate.

**Programs Supported / Areas of Responsibility:**

**Event Coordination**

**Program Lead:** Ken Knight

**Description:** Coordinates the details of events such as conferences, weddings, birthdays, anniversaries, charity events, surprise parties, trade shows, sales meetings, business meetings or any event or of a substantially like nature. This includes but is not limited to:

- Developing appropriate floor plans for the event.
- If requested, arranges for entertainment such as bands and disc jockeys, to be contracted by the renter. Maintains an appropriate listing for this purpose.
- If requested, arranges for catering services from caterers appropriate to the event, to be contracted by the renter. Maintains an appropriate listing for this purpose.

- Arrange with the renter for the specification and purchase of all alcoholic beverages and soft drinks to be consumed during the event.
- Advises the House Committee as to the hall set up for each rental,
- Coordinates Post staffing requirements for each event (i.e. bartenders, etc.).

**Program Implementation Date:** On going

**Hall Booking Calendar:**

**Program Lead:** Ken Knight

**Description:** To ensure that double bookings don't occur, the Events Committee is responsible for maintaining and communicating the overall hall usage calendar. Post committees interested in using the hall must book their requirements with the Events Committee.

**Program Implementation Date:** Continuous

**Hall Rentals**

**Program Lead:** Ken Knight

**Description:** This position is responsible for establishing rental rates, guidelines, and policies, booking rentals of the Patriot Center, including but not limited to negotiating the terms and conditions of all rental contracts, the execution of all rental contracts, and the collection and accounting of all fees associated with Post facility rentals.

The Events Committee and the House Committee share responsible for ensuring the hall is clean after each rental.

**Implementation Date:** Continuous

**Purchase and Account for All Post Alcoholic Beverages (Bar Manager)**

**Program Lead:** Steve Stuntz

**Description:** The Events Coordination Committee oversees Post alcoholic beverage inventories and places orders for beer, wine, and liquor with established distributors. Post committees needing beer, wine or liquor for upcoming events must place their requests with the Events Coordination Committee one (1) week prior to event.

**Implementation Date:** Continuous

**ShowClix Coordinator**

**Program Lead:** Ken Knight

**Description:** The Post uses a ticketing service to manage its public events. Through this service tickets are purchased, admission fees collected, tickets are issues, our inventory is managed, and proceeds are electronically distributed to the Post. The event Coordinator manages this service.

**Implementation Date:** Continuous

**Finance Committee**

**Chairperson:** Randell Lindsay (Financial Officer)

**Purpose:** To supervise the receiving, disbursement with the approval of the membership, depositing, accounting, and reporting on all Post funds. It also oversees the preparation of the Posts Federal Tax Return and prepares annual budget recommendations for the Post. It also oversees, tracks, and reports on the Post investment holdings and advises the Post on all financial policies. (The Post Finance Officer is the chair of the Finance Committee.)

**Goals & Objectives:**

- Produce a "Monthly Budget Report" for distribution at each "General Membership" meeting.
- Collaborate with the Post 318 Business Plan editor to produce an "Annual Budget".
- Prepare and file the Post 318 990, by May 15 of each year.
- Oversee "Cash Management" functions associated with all Fundraising.
- Collaborate with the Post 318 "Statutory Agent" to produce all required financial document filings.

**Programs Supported / Areas of Responsibility:**

**Annual Audit**

**Program Lead:** Randell Lindsey

**Responsibility Description:** The Finance Committee will meet at least once per year to review in detail the expense and income statements of the Post. They will certify that all funds were raised, accounted for, and expended, in an appropriate manner.

**Implementation Date:** Continuous

**Annual Budget**

**Program Lead:** Randell Lindsey

**Responsibility Description:** Using historical data, and making reasonable and understandable assumptions, Finance Committee takes the lead in developing the initial cut on the annual budget. Once the budget is finalized, the Financial Committee creates a baseline and the methodologies and processes necessary to track and report on actual revenues and expenses.

**Implementation Date:** July 1<sup>st</sup> of each year

**Cash Management**

**Program Lead:** Randell Lindsey

**Program Description:** Throughout the program year the Post conducts various fund raisers. Each of these events has unique cash start-up cash and accounting requirements. The finance committee is to assure that processes are put in place to appropriately and securely handle all cash generated by the fund raiser and to pay out any expenses associated with cash generation.

**Program Implementation Date:** on-going

**Federal Tax Return (990) / State Filings if Required**

**Program Lead:** Randell Lindsey

**Responsibility Description:** The Finance Committee will either prepare, or supervise the preparation of the Post federal tax return. If prepared by an outside firm, the Finance Committee will select the appropriate service provider and act as the interface to the Post on all tax preparation and filing issues. A copy of the Federal Tax Return will be provided to the Post 318 Corporation Statutory Agent as soon as possible to timely facilitate required Ohio Attorney General Annual Report filing."

**Implementation Date:** 1<sup>st</sup> quarter of each year

**Financial Reporting**

**Program Lead:** Randell Lindsey

**Responsibility Description:** The finance committee has a responsibility to provide summary financial reports on a regular basis (monthly). It also updates and reports monthly on the budgeted expenses, projected revenues/income, and the current cash flow position.

**Implementation Date:** Continuous

**Memorial Day Event Funding**

**Program Lead:** Randell Lindsey

**Program Description:** For Memorial Day, Post 318 organizes an event to visit and perform recognition ceremonies at several local cemeteries. The funding to support this event comes from Anderson Township and Hamilton County. To receive this funding, the post must apply annually. Hamilton County Veteran's Service contacts for this program are Jaclyn Panioto at 946-4414, or Deloris at 946-4415. The process for receiving Memorial Day funds is as follows:

- Post must fill out and submit a "Pre-form" indication how much money will be spent

- The Hamilton County Veterans Service Commission then issues a check
- After Memorial Day an itemized list of expenses is submitted with a refund check if less than \$ 500 is spent.

**Program Implementation Date:** November of each year

**Post Investments**

**Program Lead:** Randell Lindsey

**Responsibility Description:** The Finance Committee tracks and reports on the Post investment holdings. It also evaluates current portfolio holdings and makes recommendations on future investments.

**Implementation Date:** Continuous

**State Sales/Use Tax Preparation, Reporting and Payment**

**Program Lead:** Randell Lindsey

**Program Description:** Each month the Post must calculate and pay sales and use taxes to the State of Ohio. The sales/use tax is calculated on taxable revenues received from the previous month. The reporting and payment process requires on-line access to the State of Ohio payment system.

**Program Implementation Date:** Each monthly prior to the 20<sup>th</sup>.

**Fundraising Committee**

**Chairperson:** Open

**Purpose:** This committee is responsible for planning, organizing and implementing all Post fund raising activities.

**Goals & Objectives:**

- Sells HoopsMania™ Tickets
- Sells FootballMania™ Tickets
- Implements new Fund Raisers
- Schedules and Coordinates Restaurant fund raisers.
- Participates on Post Marketing Committee to identify and coordinate fund raising opportunities.
- Recruits Post Members or Friends of the Legion to participate on the Post 318 Fund Raising Committee.

**Programs Supported / Areas of Responsibility:**

**Concerts / Dances: Event Planner**

**Program Lead:** Don Bishop

**Program Description:** The Post conducts concerts and dances as part of its fundraising. The Event Planner is responsible for all aspects of scheduling, booking and marketing the individual events. This includes, but is not limited to working with the Marketing Committee and the individual bands to create the ShowClix Ticketing pages, Facebook Events and Email blasts.

**Program Implementation Date:** September through mid-June

**Concerts / Dances: Event Manager**

**Program Lead:** Various

**Program Description:** The Post conducts concerts and dances as part of its fundraising. The Event Manager is responsible for staffing and managing the individual events. The includes coordinating with the band to set up each event, to staff the events, to ensure that band and customer concerns are addressed, to handle settlement and produce dance financials.

**Program Implementation Date:** September through mid-June

**Euchre**

**Program Lead:** Joe Baker

**Program Description:** Each Thursday night and Friday at noon, the Post conducts a Euchre tournament that is open to both Post members and the public. Doors open at 6:45 PM and the tournaments begin at 7:00 PM and 11:45 AM on Friday. Buy in is \$ 5. \$ 2.50 goes to the Post, and \$ 2.50 goes to prize money.

#### **Fish Fries**

**Program Lead:** Open

**Program Description:** Each Lenten season the Post conducts Fish Fry's as part of its fundraising. The leader of this project is responsible for all aspects of planning, organizing and implementing the annual Fish Fry's. This includes, but is not limited to menu development, shopping, and staffing.

**Program Implementation Date:** February/March of each year

#### **FootballMania™**

**Program Lead:** Randall Lindsey

**Program Description:** The Post sells *CharityStudio* music and entertainment package downloads. These tickets cost \$20 each and entitle the participant to one (1) music or entertainment download. For each ticket that's sold, \$14 goes directly to the Post. With the purchase of a *CharityStudio* ticket each participant is entered into the *FootballMania™* Sweepstakes. This sweepstake is tied to the NFL season and provides an opportunity to win several monetary prizes each week of the seventeen (17) weeks season. These prizes range from \$ 25 to \$ 500. The specific details of the sweepstakes are clearly stated on each ticket.

**Program Implementation Date:** July of each year

#### **HoopsMania™**

**Program Lead:** Randall Lindsey

**Program Description:** The Post sells *CharityStudio* music and entertainment package downloads. These tickets cost \$20 each and entitle the participant to one (1) music or entertainment download. For each ticket that's sold, \$14 goes directly to the Post. With the purchase of a *CharityStudio* ticket each participant is entered into the *HoopsMania™* Sweepstakes. This sweepstake is tied to the NCAA Basketball Tournament and provides an opportunity to win several monetary prizes. The specific details of the sweepstakes are clearly stated on each ticket.

**Program Implementation Date:** January of each year

#### **Newsletter Advertising**

**Program Lead:** Open

**Program Description:** The Post distributes a monthly newsletter. We have received inquiries regarding the availability of advertising in this publication. This program is intended to develop a plan to accommodate this requirement. This plan would include advertising terms and pricing.

**Program Implementation:** ASAP

#### **Purchasing**

**Program Lead:** Ed Sears

**Responsibility Description:** Post 318 maintains a single inventory of food, beverages and supplies to support its concession operations, and events. Because most of the purchasing requirements are a byproduct of Fund-Raising events, this committee owns responsibility for overall inventory management and Post purchasing. Exceptions to this responsibility are the purchase of alcoholic beverages, and house cleaning and maintenance supplies.

**Implementation Date:** Continuous

#### **Restaurant Fundraisers**

**Program Lead:** Open



**Program Description:** Fridays, Applebee's, and other restaurant giving back 10% to 20% of revenue generated by Post members, and Friends of the Legion!

**Program Implementation Date:** 2<sup>nd</sup> Quarter one (1) restaurant (Est. \$100), 3<sup>rd</sup> Quarter one (1) restaurant (Est. \$100), 4<sup>th</sup> Quarter one (1) restaurant (Est. \$100).

## **House Committee**

**Chairperson:** Bob Alfieri

**Purpose:** The House Committee manages the operation of the physical facilities of the Post. Its supervision responsibilities include; 1) administrative activities such as inventory of chairs, tables, and other post equipment, 2) post infrastructure equipment (heating, AC, etc.), 3) the physical condition of facilities and grounds, and 4) key control access to the Post.

The House Committee is also responsible for ensuring all garbage is removed from the building for Tuesday AM pick-up, and supporting Post operations and special events.

### **Goals & Objectives:**

- Recruit Post Members or supporters of the Legion to participate on the Post 318 House Committee.
- On a regular basis, schedule and oversee routine maintenance of the Post including; HVAC, Fire Suppression, rodent control and other necessary and/or required infrastructure inspections.

### **Programs Supported / Areas of Responsibility:**

#### **Custodial Care of our Post**

**Task Lead:** Bob Alfieri

**Responsibility Description:** This position is responsible for the general appearance and routine maintenance of the American Legion Hall. He or she is responsible for organizing work parties to perform routine cleanings and maintenance of the hall.

**Implementation Date:** Continuous

#### **Grounds Maintenance**

**Task Lead:** Bob Alfieri

**Responsibility Description:** The House Committee is responsible for maintaining the appearance of the Post grounds. This includes, but is not limited to, mowing grass, trimming bushes, and maintaining the Post equipment necessary to perform these tasks.

**Implementation Date:** Continuous

#### **Infrastructure Maintenance**

**Program Lead:** Bob Alfieri

**Responsibility Description:** This position oversees and schedules routine infrastructure services such as heating & AC maintenance, fire protection, and insect and rodent elimination services. This position also interfaces directly with the Capital Project Chairman to address large infrastructure projects, and the Finance Officer for payment of operating expenses associated with the halls custodial care

**Implementation Date:** Continuous

#### **Key Control / Key Card Control**

**Project Lead:** Don Bishop

**Responsibility Description:** This position is responsible for key control and card access to the Post. It issues keys to the post, ensures that key access agreements are executed, and maintains a key inventory.

**Implementation Date:** Continuous

#### **Maintenance Supply Purchasing**

**Program Lead:** Ed Sears

**Responsibility Description:** The House Committee buys all cleaning and maintenance supplies necessary to maintain Post facilities.

**Implementation Date:** Continuous

### **Parking Lot Maintenance**

**Project Lead:** Bob Alfieri

**Responsibility Description:** The House Committee is responsible for maintaining the Post parking lot. This includes, but is not limited to arranging for the parking lot to be sealed and marked as needed. It is also responsible for minor repairs to the parking lot and the provision of snow plowing, when required. Should major capital improvements be necessary, this task would be referred to the Capital Projects Committee?

**Implementation Date:** Continuous

## **Internal / External Communications Committee**

**Chairperson:** Dan Wolfangel (Adjutant)

**Purpose:** The external aspect of this committee is to increase awareness among the veteran's community and the community at large, of The American Legion's advocacy of veterans' issues, national security and foreign relations, Americanism, and children & youth. The committee goal is to define The American Legion in the public eye by the values for which it stands. There are four (4) fundamental techniques used to accomplish this task; 1) placing radio and television advertisements and public service announcements produced by the National Public Relations Division where they can be seen and heard, 2) placement of Post 318 new stories in local newspapers, 3) developing relationships with editors and journalist serving the Post community so that they cover those programs supported by the organization's founding pillars, and 4) the development and active management of a Post web site.

This committee also has a responsibility to focus on and actively manage all internal communications. This includes the production and distribution of the monthly newsletter, and the development of new communications vehicles to better engage and inform the membership. The expectation is that this committee will also develop and deliver targeted communications to different audiences, within the post. It is also intended that this committee will utilize advances in technology to both improve the timelines of our internal communications while also reducing our overall communications cost.

### **Goals & Objectives:**

- Update, produce and distribute our annual Business Plan by July 15<sup>th</sup>.
- Obtain monthly Newsletter articles from Committee Chairmen.
- Create and deliver a Post Newsletter by the 1<sup>st</sup> of each month.
- Continue to promote and publicize Post 318 and its activities through use of print and electronic media.
- Maintain, improve and keep current information on Post web sites

### **Programs Supported / Areas of Responsibility:**

#### **Annual Business Plan**

**Program Lead:** Don Bishop

**Program Description:** Each year Post 318 will convene a work group to update and distribute to its membership a business plan. This plan is intended to reflect our current goals and objectives, post organization, operating committees, programs supported, post challenges, and a fiscal year operating budget.

**Program Implementation Date:** Continuous

#### **Liaison 4<sup>th</sup> District Newsletter**

**Program Lead:** Dan Wolfangel

**Responsibility Description:** Submit stories and photographs of post supported activities.

**Implementation Date:** Continuous

### **Liaison Hamilton County Council Newsletter**

**Program Lead:** Dan Wolfangel

**Responsibility Description:** Submit stories and photographs of post supported activities.

**Implementation Date:** Continuous

### **Liaison Local Press**

**Program Lead:** Dan Wolfangel

**Responsibility Description:** Submit stories and photographs of post supported activities.

**Implementation Date:** Continuous

### **Liaison Ohio American Legion Publication**

**Program Lead:** Dan Wolfangel

**Responsibility Description:** Submit stories and photographs of post supported activities.

**Implementation Date:** Continuous

### **Monthly Newsletter**

**Program Lead:** Joe Dubois

**Program Description:** Each month the Post produces and distributes a newsletter to its membership and other “stakeholders”. The primary content of this newsletter is current post events and a reminder of future events. Distribution of this newsletter is via U.S. Mail and email.

**Program Implementation Date:** Monthly

### **Post 318 Facebook & Other Social Media**

**Program Lead:** Eric Franz

**Program Description:** A Facebook page for Post 318 has been established. Its purpose is to promote the Post and its activities by posting information, pictures and events notices on the Facebook page.

**Program Implementation Date:** Continuous

### **Post 318 Web Sites**

**Program Lead:** Josh Richardson

**Program Description:** The Post 318 web site is one of our portals to the world. It’s a place where our members and the community at large can find out about whom we are and what we do. Specifically, it provides us an opportunity to promote our programs, and our fund-raising events. It’s also a place where we can provide membership information to potential new members. Because people who access this site will form an impression about our Post, based simply on what they see or how they can interact with the site, the site itself must be done professionally.

**Program Implementation Date:** Continuous

## **Membership Committee**

**Chairperson:** Bob Kamman (1<sup>st</sup> Vice Commander)

**Purpose:** To obtain, retain and increase the membership of the Post with specific responsibilities for renewals, enrollment of new members, transfers, reinstatements and Post 888, and provide data necessary for recognition of Post members for continuous Legion membership recognition at Post318 Annual Award and Recognition event.

### **Goals & Objectives:**

- Obtain quota by year end.
- Grow our Post membership to reach a new “All Time High”.
- Recruit sufficient members to form a Sons-of-the-American-Legion by year end.

- Recruit supporters of the Legion to participate in Post 318 programs, projects, and activities.

**Programs Supported / Areas of Responsibility:**

**Annual Membership Enrollment**

**Program Lead:** Bob Kamman

**Program Description:** Each fiscal year the Membership Committee is charged with meeting the Post membership quota defined by the Department of Ohio. This includes, but is not limited to, managing the renewal of current members and enrolling new members. This program is executed primarily via personal contacts, mailings, and phone calls.

**Program Implementation Date:** July 1<sup>st</sup> of each year

**Manages Membership Service and Contact Information**

**Task Lead:** Bob Kamman

**Responsibility Description:** A primary responsibility of the Membership Committee is to maintain and update membership service and contact information. This includes; continuous years of service mailing address, phone numbers and email addresses. Work with the Adjutant to maintain the national membership database with Data Change Forms and direct changes through the Legion portal.

**Implementation Date:** Continuous

**Membership Business Directory**

**Task Lead:** Bob Kamman

**Program Description:** Supporting veterans, and especially members of our Post, has always been one of our main objectives. To demonstrate this in a meaningful way we are creating *Members Business Directory* as part of our web site. If a member of Post 318 is self-employed, or offer's products and services for sale, or engages in a hobby that generates income, he/she can create and place an ad on our web site, at no cost, that will run as long as their membership is current. To take advantage of this offer, the member's ad should be the size no larger than a business card (2"x 3"). It can contain a link to the member's web site, if there is one.

**Program Implementation Date:** Continuous

**Membership Drives**

**Program Lead:** Bob Kamman

**Program Description:** The Membership Committee is responsible for the development and implementation of programs to identify and target new members. This includes, but is not limited to sponsoring; annual membership drives, social events, and other meet and greet opportunities.

**Program Implementation Date:** Continuous

**Post 888 Membership Drive**

**Program Lead:** Bob Kamman

**Responsibility Description:** The Department of Ohio distributes, on a regular basis, a zip code sorted lists of American Legion members who are not affiliated with local Posts. The intent of this program is to recruit Post 888 members into Post 318. This occurs through telephone contacts, letters, e-mail messages and personal visits to potential members.

**Program Implementation Date:** Continuous

**Post Activities Committee**

**Chairperson:** Kirk Minnich (2<sup>nd</sup> Vice Commander)

**Purpose:** The Post Activities committee is responsible for planning, organizing and executing all post sponsored social and community events. It's also responsible for providing snack and refreshments for all scheduled meetings the Post special events.

**Goals & Objectives:**

- Conduct our annual “Christmas Party”
- Conduct and continue to enhance our annual “Awards” ceremony.
- Participate with the Anderson Township Veterans Memorial Committee to plan and organize an annual Veterans Day celebration.
- Develop and sustain a full calendar of post events, including but not limited to service programs and social events that will either enhance the membership experience, or bring members to the Post.
- Recruit Post Members or Friends of the Legion to participate on the Post 318 Post Activities Committee.
- Create a Post environment that makes membership an enjoyable and positive experience.

**Programs Supported / Areas of Responsibility:**

**Awards Night**

**Program Lead:** Kirk Minnich

**Program Description:** Each year the Post holds an annual ceremony to recognize members of both the Post and the community for their accomplishments. Those that are recognized include, but is not limited to; Post 318 Scholarship winners, A&G Test winners, Boys State representatives, Girls State representatives, Law Officer of the Year, Firefighter of the Year, Community Life Saver of the Year, Eagle Scout of the Year, Educator of the Year, and Member Continuous Service Awards. American Legion Post 318 Charities, Inc. provides funding for this event, including purchase of awards and certificates and refreshments.

**Program Implementation Date:** July of each year

**Meeting Refreshments**

**Program Lead:** Kirk Minnich

**Program Description:** The Post activities committee provides refreshments associated with all “General Membership” meeting. To complete this task, he/she may need to coordinate with the “House” chair for the purchase of beverages, snacks and other supplies that may be needed.

**Program Implementation Date:** Continuous

**Post Events**

**Program Lead:** Kirk Minnich

**Program Description:** Throughout the year there will be special occasions and events held at the Post. The Post Activities committee is responsible for planning, organizing, and executing these events.

**Program Implementation Date:** Continuous

**Veterans Christmas Party**

**Program Lead:** Kirk Minnich

**Program Description:** Each year Post 318 hosts a Christmas party for all members, their spouses and family members and widows of former Post members. For this event, the Post is decorated, beverages are purchased, food is catered, name tags are prepared, and song books are prepared for the annual sing along. This event is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** December of each year

**Veterans Day Celebration**

**Program Lead:** Kirk Minnich

**Program Description:** In November of each year, the Post collaborates with Anderson Township, The Forest Hills School District and The Anderson Township Parks District to host a Veteran Day celebration. To commemorate this event, it’s envisioned that we will plan and organize a gala event and invite local Anderson Township Veterans to our Post. Funds for this gala have been set aside in the Charities, Inc. budget.

**Program Implementation Date;** October – November

## **Service, Veterans Affairs, Economic and Legislative Committee**

**Chairperson:** Charlie Cleves (Service Officer)

**Purpose:** This committee is a key component with combined responsibilities fulfilling the Post's needs in several administrative areas. First, it assists veterans in such areas as filing claims, obtaining copies of lost official documents, and the replacement of service medals/ribbons. Furthermore, assists veterans in securing hospitalization, visiting ailing/bereaved comrades and family members, veteran contacts, on-the-job training needs and pension concerns.

In addition, this committee assists veterans in searching for employment, to include aiding veterans in overcoming economic problems involving employment, veteran's preferences, housing concerns, civil service appeals, and employment of both handicapped as well as older workers. Coordinate and facilitate transition for active duty personnel from the immediate area between military and civilian status and assist family members in their absence.

It also acts as coordinator with the local Veterans Service Commission, the VA/VA Hospital, and with other service personnel for the betterment of the veteran.

Lastly, it disseminates legislative updates; establishes, maintains and promotes proactive grassroots lobbying activities; and establishes and maintains a liaison with elected officials and their staffs. All activities must be in compliance with Section 2, Article II of the Constitution of The American Legion: "The American Legion shall be absolutely non-political and shall not be used for the dissemination of partisan principles or for the promotion of the candidacy of any person seeking public office or preferment." This committee would also insure that the Post home be free of any political materials that would appear to be an endorsement of a particular candidate.

### **Goals & Objectives:**

- Maintain our "Military Assistance Program"
- Identify and support activities and programs that benefit both veterans in need, and active duty personnel.

### **Programs Supported / Areas of Responsibility:**

#### **Disseminate Legislative Updates to Membership**

**Program Lead:** Charlie Cleves

**Responsibility Description:** Establish a network of information sources. Obtain information on legislation (both State and Federal) and distribute to membership along with any American Legion positions.

**Implementation Date:** Continuous

#### **VA and Other Entitled Benefits**

**Program Lead:** Charlie Cleves

**Responsibility Description:** Assist members who are having trouble obtaining VA and other entitled benefits.

**Implementation Date:** Continuous

#### **Military Family Support**

**Program Lead:** Charlie Cleves

**Program Description:** In support of programs like "Operation O.H.I.O. (Ohio Helps Its Own)", the Post has budgeted Charities, Inc. funds to help active duty military families who have a documented need. It's assumed that requests for this kind of support may come from multiple sources. Expectations are each case will be decided on an individual case basis, by a vote of the Executive Committee. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** On going

## **Uniformed Ceremony Committee**

**Chairperson:** Ralph Caskey (Sergeant-at-Arms)

**Purpose:** The Uniformed Ceremony Committee provides a single point of contact, within the post, for the provision of a Post 318 Ceremonial Group. It's responsible for recruiting, organizing, training, promoting, and supervising a

uniform group, such as a color guard or rifle squad for parades and other ceremonial events. The committee is also responsible for maintaining and securing all weapons, equipment, and supplies used for the ceremonies provided.

**Goals & Objectives:**

- Increase to 50 the number of members willing to participate in major Uniformed Ceremony events (i.e. Memorial Day, 4<sup>th</sup> of July, Veterans Day and other Honor Guard functions).
- Continue support for Memorial Day Activities, including Memorial Day Bell Ceremony
- Continue support for the Anderson Township Veterans Day program
- Continue to upgrade our ceremony squad uniforms (i.e. jackets for cool weather events).
- Continue our Flag History/Flag Etiquette classes at all FHSD Elementary Schools. Expand the program to local private schools.

**Programs Supported / Areas of Responsibility:**

**4<sup>th</sup> of July Parade**

**Program Lead:** Ralph Caskey

**Program Description:** The Uniformed Ceremony Committee is responsible for planning and organizing Post 318's participation in Anderson Township's annual 4<sup>th</sup> of July parade. This includes registering for the parade and arranging for any required automobiles to transport members of our post. If requested, the Uniformed Ceremony Committee will evaluate and/or arrange for our participation in the Mt. Washington parade (July 3<sup>rd</sup>). This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** TBD

**Flag History & Etiquette / Flag Retirement**

**Program Lead:** Ralph Caskey

**Program Description:** This position is responsible for meeting the needs of the Post and our community in regards to providing information and/or presentations on flag etiquette and flag retirement. It also represents the Post at flag retirement ceremonies, as required.

**Program Implementation Date:** On-going

**Flags for Schools and Community**

**Program Lead:** Don Bishop

**Program Description:** The intent of this program is to ensure flags can be made available to the schools of the Forest Hills School District, and the Anderson Township Government, if requested. It is also intended to provide flags to other worthy Anderson Township community organizations if budgeted funds are available. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** On-going

**Forest Hills School District Opening Day Ceremony**

**Program Lead:** Ralph Caskey

**Program Description:** Each year the Forest Hills School district has a "kick-off" meeting for their teachers and staff. Post 318 provides a color guard and leads the audience in the Pledge of Allegiance. The Uniformed Ceremony Committee is responsible for planning and organizing Post 318's participation in this event.

**Program Implementation Date:** August of each year

**Funeral Services (Military Rites)**

**Program Lead:** Ralph Caskey

**Program Description:** The Uniformed Ceremony Committee is responsible for organizing and performing funeral home and/or cemetery ceremonies when requested by the families of our Post members.

**Program Implementation Date:** Continuous

### **Memorial Day Events**

**Program Lead:** Ralph Caskey

**Program Description:** The Uniformed Ceremony Committee is responsible for planning and organizing the Memorial Day events. This includes, but is not limited to ordering a bus for transportation, making breakfast reservations, insuring there is “blank” ammunition available, and recruiting members to participate in cemetery and other community services such as the Anderson Township Bell Ceremony. It also has responsibility to account for funds expended for this event and insuring that surplus funds are returned to Hamilton County.

**Program Implementation Date:** End of March each year

### **Multi-Post Events**

**Program Lead:** Ralph Caskey

**Program Description:** Throughout the year the Post is invited to participate in Multi Post events. For example, The Four Chaplains event, Pearl Harbor Day Ceremonies, The Veterans Commission Veterans Day Parade, etc. To integrate into both the veteran and Legion communities, Post 318 needs to set-up and become more active in Multi-Post events.

**Program Implementation Date:** On-going

### **Post Armory and Colors**

**Program Lead:** Ralph Caskey

**Program Description:** The Post has ceremonial weapons that need to be inventoried, secured and maintained. This task falls under the responsibility of the Post Sergeant-at-Arms (Chair of UCC). The Post Sergeant-at-Arms (Chair of UCC) is also responsible for the posting of colors at all Legion meetings, and ensuring that the Post is in compliance with the posting of the colors that are permanently displayed on our outdoor flag staff. The condition of all colors posted is also the responsibility of the Post Sergeant-at-Arms (Chair of UCC). This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** On-going

### **Special Event / Ceremonies**

**Program Lead:** Ralph Caskey

**Program Description:** As our visibility within the community increases, so does the expectation of the community on our ability to support them with a color guard and other uniformed groups for their ceremonial needs.

**Program Implementation Date:** On-going

### **Veterans Day Events**

**Program Lead:** Ralph Caskey

**Program Description:** Each Veterans Day the Anderson Township Veterans Memorial Steering Committee host an event for Veterans. The Uniform Ceremonies Committee coordinates with the steering committee to provide any Post 319 support requirements. Should other veteran, or community, organizations request Veterans Day support the Uniformed Ceremony Committee would take ownership. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** October – November each year

### **Veterans Day School Ceremonies (including other school ceremonies)**

**Program Lead:** Ralph Caskey

**Program Description:** Each year, various schools in the Forest Hills School District ask Post 318 to participate in Veterans Day recognition ceremonies. The Uniformed Ceremony Committee (UCC) is responsible for understanding each school’s requirements and then planning and organizing Post 318’s participation in these



events. The chair of the UCC will also coordinate any Post resources required in support of community Veteran Day Services/Ceremonies. In this regard, schools should be contacted in September to offer a Post contact point for these ceremonies as well as Flag History/Flag Etiquette classes.

**Program Implementation Date:** September of each year

### **Visiting or Veterans Administration Voluntary Services (VAVS) Committee**

**Chairperson:** Jerry Porter (Post Chaplin)

**Purpose:** To oversee and schedule a visiting committee of post members to give comfort and assistance to members and their families when sick or bereaved, and to visit hospitalized, or home bound, veterans. This committee is also responsible for keeping track of where our infirmed members are located. It is recommended the Post Chaplain chair this committee and that all Post members share in this vital function by taking their turn as committee members.

#### **Goals & Objectives:**

- Schedule and conduct a minimum of four (4) VA Hospital visits (VAVS Program).
- Continue our support to Joseph House, Fisher House and Gifts to Yanks
- Continue our “Active Duty Gift Package” program for our members and Anderson Township residents whom are on active duty.
- Enhance our visit program to our infirmed and assisted living members.
- Recruit Post Members or Friends of the Legion to participate on the Post 318 VAVS Committee.

#### **Programs Supported / Areas of Responsibility:**

##### **Active Duty Gift Packages**

**Program Lead:** Jerry Porter

**Program Description:** Each year Post 318 sends out Christmas Packages to our Active Duty members and other Anderson Township Active Duty military personnel. The Uniformed Ceremonies committee oversees this activity. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** November of each year

##### **Fisher House Advocate**

**Program Lead:** Jerry Porter

**Program Description:** Fisher House is a home located on the campus of the Cincinnati V.A. Hospital. It provides food and housing for out-of-town families who have family members that are patients in the VA Hospital. As the Post advocate, he or she manages any specific support request made to the Post by Fisher House. Additional information on Fisher House can be found in the “Philanthropy Section” of this business plan. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** Continuous

##### **Hospital Visits**

**Program Lead:** Jerry Porter

**Program Description:** The expectation of the Hospital Visits Team is that they will actively identify Post members who are admitted to the hospital then visit those members when appropriate and report back to the post membership on their visit.

**Program Implementation Date:** Continuous

##### **Joseph House Advocate**

**Program Lead:** Jerry Porter

**Program Description:** Joseph house is a set of homes in the Cincinnati area that provide services to homeless veterans. As the Post advocate, he or she manages the Post’s on-going collection of clothing for the organization

and address any specific request made to the Post by Joseph House. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** Continuous

#### **Manage Bible Inventory**

**Program Lead:** Dan Wolfangel

**Program Description:** In lieu of flowers and other memorials, the Post has decided to purchase bibles which are presented to the next of kin of our departed comrades. The Chaplain is responsible for maintain our bible inventory. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** Continuous

#### **Memorial (Poppy) Services**

**Program Lead:** Jerry Porter

**Program Description:** This position will interact with the family of a departed Post member to ensure that their basic needs are being met. He or she will reach out to other Post members for support, as required. He or she will also provide the prayer at any funeral home or cemetery services conducted by the American Legion, and also be responsible for the inventory of Post Bibles that are stored at the Post.

**Program Implementation Date:** Continuous

#### **Post Visits by Hospitalized Patients**

**Program Lead:** Jerry Porter

**Program Description:** The VA Hospital has instated a program to bring hospitalized patients out to various Post for “day trips”. This intent is to give these veterans a chance to get away from the hospital, and to interact with other veterans. If the Post agrees to these visits, the expectation is they will entertain these patients for a couple of hours and feed them an nice meal.

**Program Implementation Date:** Continuous

#### **Retirement Home or Home Bound Visits**

**Program Lead:** Jerry Porter

**Program Description:** The expectation of the Retirement Home, or Home Bound, Visits Team is that they will periodically visit Post members and report back to the Post membership on their visit.

**Program Implementation Date:** Continuous

#### **Visiting or Veterans Administration Voluntary Services (VAVS)**

**Program Lead:** Jerry Porter

**Program Description:** The Veterans Administration manages a program of volunteers who meet with and entertain veterans who are patients in a VA hospital. Post 318 will participate in this program at least once per quarter. The Visiting or Veterans Administration Voluntary Services (VAVS) plans and organizes these events. This includes, but is not limited to, ensuring that we enough members to participate in each scheduled event, and the purchase of refreshment for the events hosted by Post 318. This program is funded by American Legion Post 318 Charities, Inc.

**Program Implementation Date:** Continuous

## **V. Post Challenges**

### **Overview**

Our primary challenges for the 2021-2022 fiscal year are a combination of challenges that are a consequence of the Covid-19 outbreak, and other concerns we’ve discussed for years. Our # 1 priority is to *Restore Our Events and*

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***Their Related Revenue Streams.*** Other challenge on our priority list that need to be addressed are: we must continue to ***Fill Post Leadership Positions***, to ***Sustain and Grow Membership*** and continue to ***Improve Internal Communications***. A brief description of each challenge is listed below.

### **Restore Our Events and Their Related Revenue Streams**

Our cash flow to maintain Post Operations is about \$6,000 each month. To continue our programs an additional \$ 2,800 is contributed each month by Charities, Inc. The majority of money to support Post Operations is raised through our schedule of events; bingo, dances, fish fry's and euchre. To combat the Covid-19 outbreak, the Post was closed and all of our events were cancelled. This caused our revenue generation to come to a screeching halt. A primary assumption is that when the Post reopens, to restore our revenue streams, we must reestablish our schedule of events.

### **Fill Post Leadership Positions**

Members willing to take on leadership positions within the Post continue to decline. Since 2019, 3 major committees have not had identified leaders. The impacts this is having on the Post are 1) we are losing visibility within the community, 2) participation in our programs is declining, and 3) dedicated Post members are dealing with "burn out" because they are picking up duties and responsibilities, belonging to committees with unfilled leadership positions. If we can't fulfil our mission as an American Legion organization the question becomes why are we here?

### **Sustain and Grow Membership**

Membership is at the heart of who we are and what we can do. We have made membership quota since 2007, that's fifteen (15) consecutive years. In 2020, we finally exceeded our all-time high membership number. In 2021, we increased our all-time high again. We will keep our eye on our quota attainment throughout the year and strive to make our 2022 quota before November 11<sup>th</sup>.

Our challenge is to continue doing things that raise our visibility within the community (schools, Chamber of Commerce, etc.), allowing us to recruit new members. A primary goal is to exceed our all-time membership level each and every year.

### **Improve Internal Communications**

Our internal communications (newsletter, Facebook, websites, e-mails, etc.) took a hit in the last Program Year. We paid little or no attention to communicating with our membership, and we heard virtually nothing from them. This is a recipe for failure. We have to do better! We can start by getting our Newsletter out on a regular basis. However, it has to provide value to our membership. We have to provide an edited document that communicates what we're doing and why. We must remain dedicated to keeping our members informed so they know what is going on in our Post and what the Post and our membership are doing in the community.

## **VI. Financial Plan**

### **Overview**

The purpose of this section is to define the Post 318 Financial Plan for fiscal year 2021-2022, which runs from July 1, 2021 through June 30, 2022. Its intent is to ensure that our membership clearly understands our projected expense, income, and cash flow positions.

### **Financial Summary**

The following summarizes our financial projections for fiscal years 2021-2022. It projects a surplus of \$ 12,232. Unfortunately, our reality is the expense numbers will materialize. To obtain the revenue numbers will require a significant amount of work. Failure to generate revenues close to our projected expenses will have consequences!

<b>2020-2021 Expense Projections</b>	=	<b>\$ 91,262</b>
<b>2020-2021 Income Projections</b>	=	<b><u>\$ 103,494</u></b>
		<b>\$ 12,232</b>

### **Operating Budget (See Expense Spreadsheet for Details)**

The Post 318 operating expenses are incurred to fund the day-to-day operations of the Post. These costs are made up of both “fixed” and “variable” expenses. There are some discretionary expenses within the operating budget, but most of these discretionary expenses are directly tied to revenue production. Therefore, if we don’t incur the expense, we can’t generate associated income. American Legion Post 318 Charities, Inc. will continue to restore all “*Program*” and “*Charitable Giving*” they historically have funded. However, we don’t expect that CI funding will be fully restored. Therefore, some of these expenses will either have to be reduced, or the Post will have to contribute funds to maintain spending levels.

### **Revenue Projections (See Revenue Projection Summary for Details)**

For business plan purposes, Post 318 income projections have been broken down into two (2) categories (listed below). Going forward, as we gain experience in identifying our income streams, we may add or merge categories.

**Income Projections** – Post 318 income projections account for revenue generated from services we provide and fund-raising projects we undertake. This category includes revenue from; hall rentals, fundraisers, bingo, donations and other such sources.

**Earnings Projections** – Post 318 earnings projections account for revenues generated by our investments and cash reserves. This category includes income from; CD’s, savings accounts and other investments. Currently, our only investment that will generate earnings are our savings account, and a CD we hold.

## **Beginning Asset Values**

The following represents the asset value of Post 318, just prior to the beginning of this fiscal year (2021-2022).

<b>Liquid Assets</b>	<b>Value (As of 6/30/21)</b>
First Financial - Checking	\$ 9,500
First Financial - Savings	\$ 57,615
First Financial - CD	\$ 45,190
PNC Events Account	\$ 1,550
PNC Bingo Account	\$ 600
Petty Cash	\$ 750
<b>Current Liquid Assets</b>	<b>\$ 115,205</b>
<b>Property Basis*</b>	
Property Purchase (Cleveland & Scheckles)	\$512,500
CinTech Improvements	\$580,705
Daleco Improvements	\$15,374
DSD Improvements	\$12,369
House Improvements	\$8,000
<b>Non-Liquid Assets</b>	<b>\$ 1,128,948</b>
<b>Total Assets</b>	<b>\$ 1,244,153</b>
<b>Liabilities*</b>	
First Federal Mortgage	\$ 163,625
<b>Total Liabilities</b>	<b>\$ 163,625</b>
<b>Total Net Assets</b>	<b>\$ 1,080,528</b>

## 2021 - 2022 Expense Budget

<b>Operating Budget</b>	<b>2022 Budget</b>	<b>Assumptions</b>
<b><i>Utilities</i></b>	<b>\$ 20,700</b>	
Gas & Electric	\$ 15,600	\$ 1,300/Month
Water & Sewer	\$ 1,800	\$ 150/Month
Trash Removal	\$ 780	\$ 65/Month
Telephone, Cable TV & Internet	\$ 2,520	\$ 210/Month
<b><i>Services</i></b>	<b>\$ 11,614</b>	
Post Office Box	\$ 140	Same as 2021
Security & Fire Protection	\$ 750	Monitoring & Inspection Fee - NC
Bank & CC Fees	\$ 624	Same as 2021
Legal Fees	\$ 1,500	Same as 2021
Property Insurance	\$ 8,400	\$ 700/Month
IT Support	\$ 200	Same as 2021
<b><i>Office Supplies &amp; Tech. Expenses</i></b>	<b>\$ 2,640</b>	
Office Supplies	\$ 600	Same as 2021
Printing Supplies & Paper	\$ 900	Same as 2021
IT Expenses	\$ 600	Same as 2021
Postage	\$ 540	Same as 2021
<b><i>Legion &amp; Organization Fees</i></b>	<b>\$ 6,613</b>	
Membership Fees	\$ 3,575	130Paid Members @ \$27.50
Assessment - 4th District	\$ 50	\$.30/Member (166 Members)
Assessment - HCC	\$ 60	Same as 2021
Meeting Refreshments	\$420	Same as 2021
Post Activities	\$ 500	Same as 2021
Convention Expenses	\$ 1,500	Provides for 3 delegates
Training	\$ 120	Same as 2021
Chamber of Commerce Fees	\$ 388	Same as 2021
<b><i>Mortgage Expense &amp; Taxes</i></b>	<b>\$ 18,465</b>	
Mortgage Expense – First Financial	\$ 17965	Same as 2021
Charitable Registration Fee	\$ 200	Same as 2021
Property Taxes	\$ 300	Same as 2021
<b><i>Hall &amp; Club Room Expenses</i></b>	<b>\$ 2,600</b>	
Bar & Kitchen Supplies	\$ 2,600	Same as 2021
<b><i>Public Relations / Communications</i></b>	<b>\$ 860</b>	
Post 318 & Patriot Center Web Sites	\$ 200	Same as 2021
Email Marketing	\$ 360	Same as 2021
Public Relations	\$ 300	Same as 2021
Legislative Programs	\$ 0	No budget defined
<b><i>Licenses &amp; Govt. Permits</i></b>	<b>\$ 3,420</b>	
Fire Department Ins./Permit	\$ 35	Same as 2021
Health Certificate	\$ 485	Increase over 2021
Liquor License	\$ 2,900	Same as 2021

**2021 - 2022 Expense Budget (Cont.)**

<b>Operating Budget</b>	<b>2022 Budget</b>	<b>Assumptions</b>
<b><i>House Mtce. &amp; Repairs</i></b>	<b>\$ 14,350</b>	
Appliance Repair	\$ 1,200	Same as 2021
Heating & AC Maintenance	\$1,000	Same as 2021
Pest Control	\$ 600	\$ 50/Month
Plumbing	\$ 300	\$ 25/Month
Electric / Alarm Work	\$ 1,200	Same as 2021
Hood Cleaning & Inspection	\$ 800	Same as 2021
Minor Repairs	\$ 900	Same as 2021
Grounds Maintenance / Parking Lot	\$ 1,750	Same as 2021
Furniture & Equipment	\$ 800	Same as 2021
Window Cleaning	\$ 200	Same as 2021
Snow Removal	\$ 500	Same as 2021
Cleaning & Maintenance Sup.	\$ 4,800	Same as 2021
Undefined Expenses - 2018	\$ 300	Same as 2021
<b><i>Charitable Contributions</i></b>	<b>\$ 0</b>	
Post 318 Charities, Inc	\$ 0	Paid by Bingo
Memorial Day Expenses	\$ 0	Equals Contribution
<b><i>Capital Projects</i></b>	<b>\$ 10,000</b>	
TDB	\$ 10,000	
<b>Total</b>	<b>\$ 91,262</b>	

## 2021 - 2022 Revenue Projections

<b>Income Projections</b>	<b>2022 Budget</b>	<b>Assumptions</b>
<b>Hall Rental Total</b>	<b>\$ 16,824</b>	
Hall Rental*	\$ 8,976	\$800/Month less tax
Office Rental - 501 C (3)*	\$3,360	\$ 300/Month less tax
Kitchen Rental*	\$ 4,488	\$ 400/Mont less tax
<b>Hall Rental Linens &amp; Services Total</b>	<b>\$ 850</b>	
Linens (Net)*	\$ 562	\$ 50/Month less tax
Other (Net)*	\$ 288	\$ 24/Month less tax
<b>Beverage Sales Total</b>	<b>\$ 15,307</b>	
Beverage Sales - Hall Rental*	\$ 3,364	\$ 300/Month les tax
Beverage Sales - Club Room*	\$ 1,121	\$ 100/Month less tax
Beverage Sales – Events*	\$ 10,822	\$ 965/Month less tax
<b>Bingo Contributions Total</b>	<b>\$ 29,383</b>	
Bingo (Sunday Nights)#	\$ 24,000	\$ 500/week
Bingo Concessions (Net)*	\$ 5,383	\$ 120/week
<b>Fundraising Total</b>	<b>\$ 34,730</b>	
Dances / Concerts (Net)*	\$ 15,000	COVID will hold down attendance
Euchre Donations#	\$ 2,880	\$ 60/week
FootballMania™#	\$ 2,000	Same as 2021
HoopsMania™#	\$ 1,600	Same as 2021
Hometown Heroes	\$ 5,000	Added to budget
Lenten Fish Fries (Net)*	\$ 6,380	
Split the Pot (Monthly Mtgs.)#	\$ 470	Equals Meeting Refreshments
Split the Pot (Events)#	\$ 1,400	
<b>Miscellaneous Total</b>	<b>\$ 6,400</b>	
Legion Dues#	\$ 5,200	130 paid members @ \$40
Sales Tax Collected		
Donations#	\$ 1,200	\$ 100/Month
<b>Sub Total</b>	<b>\$ 103,494</b>	
<b>Earnings Projections</b>	<b>\$ 0</b>	
Investment Income	\$ 0	
<b>Sub Total</b>	<b>\$ 0</b>	
<b>Total</b>	<b>\$ 103,494</b>	

\* After Sales Tax

# No Sales Tax