Local Auxiliary Guidelines



Auxiliary to Sons of Union Veterans of the Civil War
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INTRODUCTION

The intent of this document is to assist officers in local Auxiliaries of the Auxiliary to Sons of Union Veterans of the Civil War to better understand and fulfill the duties of their various offices and the associated forms that may be required with each.

This document is supplemental only and is not intended to replace the Constitution, Rules and Regulations, the National Ritual, the Department or Auxiliary Bylaws, or any other governing documents. In the event of a conflict between this document and any governing document, the latter shall take precedence.

AUXILIARY MEETINGS

Regular and special meetings of an Auxiliary shall be held as provided by their respective By-Laws.

PRESIDING OFFICER

In the absence of a President, the Vice President or a Past President may preside over the meeting.

SPECIAL MEETINGS

The President shall call a special meeting at any time she shall find it necessary, due notice being given every member (at least 10 business days), stating object of the meeting, and no other business may be transacted at that meeting, unless the notice states "any other business that may come before the meeting."

POSTPONEMENT OF A REGULAR MEETING

Where it is found impossible to hold meetings on the date of regular meeting, it may be postponed to another date upon vote of the Auxiliary, when it shall be known as a regular meeting and so marked.

QUORUM

Three (3) members shall constitute a quorum at a regular or special meeting.

NOMINATION AND ELECTION OF AUXILIARY OFFICERS

NOMINATING AND ELECTING

The nomination and election of all Auxiliary officers, including Delegates and Alternate Delegates, shall be held in conformity with the Sons of Union Veterans of the Civil War. The candidate may elect a Sister to office if not present, if the nominator can vouch for her acceptance.

VACANCIES

A vacancy in any of the elective offices may be filled by an election at any stated meeting, with the exception of Auxiliary President, which shall be filled by the Auxiliary Vice President. Notice of said election must be given to each member of the Auxiliary (at least 30 days). The President at any stated meeting of the Auxiliary may fill vacancies occurring in the appointive offices.

ELECTIVE OFFICERS

The elective officers of the Auxiliary shall consist of a President, Vice President, three (3) Council Members, Secretary, Treasurer, Patriotic Instructor, Chaplain and Press Correspondent.

COUNSELOR

An Auxiliary Counselor must be a member in good standing of the Sons of Union Veterans of the Civil War; in the case of an independent Auxiliary, where no Camp exists, a Past President in good standing may fill the Counselor's chair.

DELEGATES

Each Auxiliary shall elect at the same time with other officers, a National Delegate and Alternate, and such Department Delegates and Alternates as it is entitled by the Department By-Laws.

DATES OF ELECTION AND INSTALLATION

Auxiliaries are to hold election of officers in November with installation in December or January.

DUTIES OF AUXILIARY OFFICERS

PRESIDENT

The President shall preside at all meetings of the Auxiliary and shall preserve order and decorum therein. She shall enforce a strict observance of the Constitution, Rules and Regulations, the Auxiliary By-Laws, and orders received from proper authority. It shall be her duty to appoint all committees and sign all requisitions for money to he drawn from the treasury. Also, the President is to fill out the **Certification of Election and Installation of Auxiliary Officers (Form A01)** for each year and forward two (2) copies of the same to the Department Secretary after elections, which are to be held in the month of October, November or December. She is also to arrange with the Department President to have an Installing Officer present for the Installation of Officers, to take place in December or January. She shall also provide a prepared Report of the activities of the Auxiliary to the Department President at or before the Department Encampment. Presidents in Auxiliaries at Large where there is no Department shall report directly to the National President.

The President shall be responsible for the following forms/reports:

- Certification of Election and Installation of Auxiliary Officers (Form A01)
- Activity Report

VICE PRESIDENT

The Vice President shall assist the President in preserving order and decorum. In the absence of the President, she shall take charge of the meeting. She shall maintain a **Member Descriptive Book (Form A11)** containing the full facts of each member, on which the rights to membership are based, such as name, residence, date of application and initiation, giving in concise form a brief, but complete history of the case; and all such other books as are required to keep full and complete records. The Vice President shall forward The **Vice President's Report (Form A05)** with two (2) copies to the Department Vice President in time for the Department Encampment, a prepared report of the gains in membership to the Department Vice President upon official blanks, a report of her year's work. Vice Presidents in Auxiliaries at Large where there is no Department shall report directly to the National Vice President.

The Vice President shall be responsible for the following forms/reports:

- Vice President's Report (Form A05)
- Member Descriptive Book (Form A11)

COUNCIL

The Council is to carefully review the books of the Auxiliary, shall thoroughly check all vouchers and canceled checks, and satisfy themselves that the balance of cash on hand agrees with a statement from the bank which the Auxiliary Treasurer shall be required to present. A correct statement of the financial standing of the Auxiliary shall be presented at the April meeting. Also Council #1 shall prepare a report on official blanks and forward to the Department Treasurer the findings of their financial review of the Auxiliary along with the completed IRS tax forms. The Council shall fill any

vacancy occurring in an elective office of the Auxiliary with the exception of President, which shall be filled by the Vice President. The President**,** Secretary and Treasurer shall not be eligible for the office of Council.

The Council shall be responsible for the following forms/reports:

- Treasurer's Report (Form A04)

SECRETARY

The Secretary shall keep an accurate record of the officers attendance on the **Roll of Officers (Form A09)** also she is to keep an accurate record of the minutes from a Auxiliary meeting, to which shall be read in full at the succeeding meeting and, if necessary, corrected and approved. She shall keep a copy of the Constitution, Rules and Regulations, and Auxiliary By-Laws, which shall be provided to each new sister at the time of becoming a member. She shall perform all other duties pertaining to her office, and on surrendering the same, shall turn over to her successor all books, papers, etc. in her possession, belonging to the Auxiliary, taking a receipt therefore. She shall conduct all correspondence unless otherwise ordered. The Secretary is to fill out the **Per Capita Report (Form A02)** and send two (2) copies to the Department Secretary no later than April 1st or there is a $5.00 fine to be assessed if not received in time.

The Secretary shall also complete an **Auxiliary Status Report (Form A03)** when there is any change in status of a Sister throughout the year, and shall submit two (2) copies to the Department Secretary.

As required, the Secretary shall also complete and submit to the Department Secretary two (2) copies each of the following forms: **Property (Form A08)**, **Charitable Activities Report (Form A10)**, **Transfer (Form A12)**, **Honorable Discharge (Form A13)**, **Dual Membership Application (Form A14)** and **Life Membership Application (Form A15)**.

The Secretary shall be responsible for the following forms/reports:

- Annual Auxiliary Per Capita Report (Form A02) — Due by April 1st.
- Status Report (Form A03)-Monthly if needed.
- Property (Form A08)
- Roll of Officers (Form A09)
- Charitable Activities Report (Form A10)
- Transfer (Form A12)
- Honorable Discharge (Form A13)
- Dual Membership Application (Form A14)
- Life Membership Application (Form A15)
- Application for Membership (Form A16)
- Membership Cards
- Credential Cards

TREASURER

The Treasurer shall have charge of the funds of the Auxiliary. She shall pay all requisitions drawn by the Secretary and approved by the President. She shall keep a current record of the financial standing of each Sister and shall notify any sister in arrears for dues at the end of each year. She shall give a report at the close of each meeting of the receipts of the meeting and draw all requisitions for bills approved by the Auxiliary and such other monies as may be expended by vote of the Auxiliary. Also the Treasurer is responsible for filling out a **Treasurer's Report (Form A04)** and sending two (2) copies to the Department Treasurer. She shall also to file the Auxiliary's tax form (1099-EZ) on time and provide a copy with the Form A04 and keep one (1) copy for the Auxiliary records. At the end of her term of office, she shall turn over to her successor all of the funds, books, papers and other property of the Auxiliary in her possession. Along with yearly filing to the IRS she will need to file a 8822-B form with the IRS to indicate who is the contact person for the Auxiliary's EIN number. Please reference the form that deals with the 8822-B form.

The Treasurer shall be responsible for the following forms/reports:

- Treasurer's Report (Form A04)
- 1099-N EZ Form (IRS Tax Filing)
- 8822-B Form (IRS) dealing with change in contact information for the Auxiliary's EIN

PATRIOTIC INSTRUCTOR

The Patriotic Instructor shall perform all the duties in connection with that office for the purpose of teaching patriotism and love of country. She shall fill out the **Patriotic Instructor's Report (Form-A07)** and forward the same to the Department Patriotic Instructor after Memorial Day or by the 15th of June. Patriotic Instructors in Auxiliaries at Large where there is no Department shall report directly to the National Patriotic Instructor.

The Patriotic Instructor shall be responsible for the following forms/reports:

- Patriotic Instructor's Report (Form A07)

CHAPLAIN

The Chaplain shall conduct the devotional services of the Auxiliary, and officiate at the funeral of deceased Sisters. She shall fill out the **Chaplain's Report (Form-A06)** forwarded to the Department Chaplain after Memorial Day or by the 15th of June. The Chaplains in Auxiliaries at Large where there is no Department report directly to the National Chaplain.

The Chaplain shall be responsible for the following forms/reports:

- Chaplain's Report (Form A06)

PRESS CORRESPONDENT

The Press Correspondent shall compile items of interest about her Auxiliary and forward to the Department Press Correspondent for submission to *The Banner* and the National ASUVCW newsletter.

GUIDES, GUARDS, MUSICIAN & COUNSELOR

The Guide, Assistant Guide, first and second Color Guards, Inside and Outside Guards, Musician, and Counselor shall perform such duties as are prescribed by the Ritual of the Order.

DESCRIPTIONS OF FORMS

CERTIFICATION OF ELECTION AND INSTALLATION OF AUXILIARY OFFICERS (FORM A01)

The President will need to fill in the names of the officers-elect for the upcoming year and then contact the Department President who will appoint an Installing Officer for the Auxiliary. The Form A01 should be completed after the election meeting and must be signed by the Department President or her appointee at the time of installation of the new officers.

It is also important to provide the Department Secretary with the names of the Sisters elected to be delegates to the Department and National Encampments.

ACTIVITY REPORT

Provide a written report of the activities of the Auxiliary since the last Department Encampment, to be submitted at or before the Department Encampment. A summary oral report of activities (generally no longer than 5 minutes) should also be prepared for delivery at the Department Encampment. There is no prescribed form or format for either the written or oral report.

VICE PRESIDENT'S REPORT (FORM A05)

Report the names of new Sisters and the Sister who sponsored them, along with their initiation date, since the last Department Encampment. The completed report shall be submitted to the Department Vice President at or before the Department Encampment.

MEMBER DESCRIPTIVE BOOK (FORM A11)

A Descriptive Book containing the full facts of each member, giving in concise form a brief, but complete, history of the member's time in the Auxiliary. It should include the member's name, residence, date of application and initiation, and the facts on which rights to membership are based.

Copies of the following forms, if applicable, should be attached to the member's descriptive page:

- Application for Membership (Form A16)
- Dual Membership Application (Form A14)
- Honorable Discharge Form (Form A13)
- Transfer Form (Form A12)
- Life Membership Application (Form A15)

REPORT OF COUNCIL
ANNUAL TREASURER'S REPORT (FORM A04)

Among the duties of the Council is to conduct a financial review of the Auxiliary. The Council shall carefully review the books and shall thoroughly check all vouchers and canceled checks, and satisfy themselves that the balance of cash on hand agrees with a statement from the bank, which the Auxiliary Treasurer shall be required to present. A correct statement of the financial standing of the Auxiliary shall be presented at the April meeting. The Council shall review and sign off the Annual Treasurer's Report (Form A04), which shall then be forwarded to the Department Treasurer. A copy of the Auxiliary's filed tax form(s) shall be included with the report.

ANNUAL PER CAPITA REPORT (FORM A02)

This form is not only an annual report to the Department on the Auxiliary, but also serves as an update for the Auxiliary's status by reporting changes since the last Form A03 (Auxiliary Status Report). All new Sisters, drops, etc., since the prior Form A03 shall be reported on this form.

The Auxiliary must submit two (2) copies of Form A02 to the Department Secretary with all supporting paperwork (applications, rosters, etc) and include payment for all money due to the Department on or before April 15th of each year. The Auxiliary should retain an additional copy for its records. The report shall include a copy of the Auxiliary roster with the following information:

1. Full Name
2. Address
3. Status *(Member, Associate, Junior, Dual Member, Life Member)*
4. Phone Number
5. Email Address
6. Date of Birth *(For Junior Members)*

Please attach two (2) copies of each new Sister's completed application. Please use the most current application form to assist the Department and National Officers who have to enter this data. Also, be sure to include the National New Member Fee of $10.00 for each new Sister.

After the submittal of Form A02, additions, deletions and changes to the Auxiliary membership shall be reported through the Department Secretary using Form A03, with supporting documentation as required.

The annual per capita dues due to the National organization is $9.00 for each existing Sister (except Life Members [after the first year] and Junior Members).

Junior Members will be automatically upgraded to Members in the National database on their 12th birthday, if their date of birth has been reported.

STATUS REPORT (FORM A03)

The Auxiliary Status Report (Form A03) is to be used for actions occurring between January 1 and December 31, except during the month of April when the Annual Per Capita Report (Form A02) is due.

The Auxiliary shall forward the Auxiliary Status Report and associated documents to the Department Secretary to arrive no later than the 1st day of the month following a change. The

Department Secretary shall forward the Auxiliary Status Report and associated documents to the National Secretary no later than the 15th of the month after it was received from the Auxiliary.

PROPERTY REPORT (FORM A08)

This form is used for tracking all property belonging to the Auxiliary. The form shall record a description of the property, its location, in whose possession it is, and when that person took possession of the property. The Property Report shall be completed and submitted to the Department Secretary on or before the Department Encampment.

ROLL OF OFFICERS (FORM A09)

This form is used for tracking the attendance of the Auxiliary officers at each meeting and to help record any special events in which the Auxiliary may have taken part throughout the year.

CHARITABLE ACTIVITIES REPORT (FORM A10)

The Charitable Activities Report is used to track the charitable activities (monetary, material, and time donations) of your local Auxiliary, in accordance with the Auxiliary's principle of Charity. The **Charitable Activities Log (Form A10a)** can be used to assist in tracking the data. The report is then used by the Department to assist in reporting the overall charitable activities of the Department to the National Organization. Steps to follow include:

- Record the Auxiliary's number, Department, and the period covered by the report at the top of pages 1 and 2.
- Compile a list of charitable activities and donations performed by the Auxiliary, or by individual Sisters on behalf of the Auxiliary.
- Complete the report, inserting items from the compiled list into the most appropriate category. Please only list each item in one category. Use the "Other" category if the item does not fit into one of the existing categories.
- Tally the total value of the donated time and materials and indicate the results in the "Grand Total" section.
- Submit the completed report to the Department Secretary, or her designee, at or prior to the annual Department Encampment.

TRANSFER (FORM A12)

For a member transferring out of the Auxiliary, complete the transfer form with the member's information from their application and the Descriptive Book and present the form to the member. If a transfer form is received, the Auxiliary from which the member has transferred shall be notified that the member has joined the new Auxiliary. Be sure to show the loss or gain on either a Form A02 or Form A03 and shall be completed and submitted to the Department Secretary with the necessary copies

HONORABLE DISCHARGE (FORM A13)

When a Sister no longer wishes to remain a member of the Auxiliary, and the she is current on dues for that year, she shall then be given an Honorable Discharge. This will allow her to be reinstated at some future date to any Auxiliary without resubmitting a membership application. Once this has been done, either a Form A02 or Form A03 shall be completed and submitted to the Department Secretary with the necessary copies.

DUAL MEMBERSHIP APPLICATION (FORM A14)

The applicant will fill out the form along with necessary fees for membership. After the application is approved, the original should be kept by the Vice President to be filed with the Descriptive Book on membership. Once this has been done, either a Form A02 or Form A03 shall be completed and submitted to the Department Secretary with the necessary copies.

LIFE MEMBERSHIP APPLICATION (FORM A15)

The applicant will fill out the form along with necessary fees for life membership. After the application is filled out and sent to the National Treasurer, the National Treasurer will send back the necessary copies for the Department and Auxiliary. The Auxiliary will need to place the copy in the member's file with their Descriptive Book. Also, the Auxiliary shall pay Per Capita Dues on the Sister from one year of receiving the application.

APPLICATION FOR MEMBERSHIP (FORM A16)

This is one of the most important forms used. The applicant will fill out the form along with necessary fees for membership. Items that would normally be included are: Initiation Fee (if the local Auxiliary requires one), National Initiation Fee of $10.00, annual dues, cost of badge, etc.

After the Application is approved, the original should be kept by the Vice President to be filed with the Descriptive Book on membership. Two (2) copies should be sent with the Annual Per Capita Report (Form A02), or fill out a Auxiliary Status Report (Form A03), and submitted to the Department Secretary.

MEMBERSHIP CARDS

These need to be filled out at the beginning of the year, after the annul dues are collected by the Auxiliary. These cards must be purchased from the National Supply Officer.

CREDENTIAL CARDS

These cards are filled out for the Delegates attending the Department and National Encampments. The member must provide their Membership Card along with their Credential Card in order to be seated at an Encampment.

CHAPLAIN'S REPORT (FORM A06)

Complete the required form with the names of any Sisters from the Auxiliary who has passed away since last Memorial Day. If known, please include both a birth date and death date. This report shall be forwarded to the Department Chaplain between Memorial Day and June 15th.

PATRIOTIC INSTRUCTOR'S REPORT (FORM A07)

Complete the required form and mention any special activities in which the Auxiliary took part. There are a wide variety of projects that an Auxiliary will work on that are not covered by the report. Give a brief summary (for example: living history demonstration, new Memorial Day program in the community, or restored a veteran's grave site, etc.). These special projects will be mentioned in the Department report and then sent on to the National Patriotic Instructor. Once the report is completed it shall to be forwarded to the Department Patriotic Instructor between Memorial Day and June 15th.