# MEMBERSHIP MANUAL





THE ROYAL CANADIAN LEGION



Membership Manual

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# PART I ELIGIBILITY GUIDE

PART I of this manual deals with Eligibility and is designed to assist branch membership chairmen and others dealing with membership to determine who is eligible for membership. It includes information on member privileges, military service, Commonwealth subjects, allied forces and history of membership categories.

We have tried to cover all areas dealing with membership eligibility however, if you have questions, you may wish to contact your zone or district Commander or your Command office for assistance.

Information in this manual has been obtained from a number of reliable sources; however, should you observe any inaccuracies, please contact the Membership Section at Dominion Command.

We hope branches find this a useful and informative publication.

Good Luck with your membership programs.

# ELIGIBILITY

### WHAT DOES IT MEAN?

### AGE OF MAJORITY

For the purposes of membership, age of majority shall be federal voting age.

### APPLICATIONS

All membership applications must be reviewed by the Branch Membership Committee. The committee must satisfy itself as to the facts, eligibility, character and suitability for membership. The committee must present the application and report its findings to a general or special meeting of the branch. It is then up to the general membership to determine by vote, approval or otherwise. This applies to original, reinstatement and transfer applications.

**Note:** The Branch Executive Committee has the authority to approve applications for membership when regular monthly general meetings of the branch are not held.

### CADET YEAR

The Cadet year runs from September to June; therefore, any three such periods would constitute three years service.

#### **CITIZENSHIP REQUIREMENTS**

Membership is open to Canadian citizens, Commonwealth subjects or non-Canadian citizens/non-Commonwealth subjects from an Allied Country.

### VOTING

Voting membership is open to Canadian citizens and Commonwealth subjects who are of federal voting age. Non-Voting membership is open to non-Canadian citizens and non-Commonwealth subjects from an Allied Nation who are of federal voting age. Refer to pages 21-23 for countries that qualify.

### **EFFECTIVE DATE OF MEMBERSHIP**

Is the date an application is approved at a branch general meeting providing dues have been paid for the year in which the application is approved. If current year's dues are not paid, membership does not become effective until January 1<sup>st</sup> of the year paid.

### IN GOOD STANDING

A member in good standing: has been initiated is not under suspension; has paid membership dues for the current year; and whose per capita tax has been submitted to Dominion Command.

### **INITIATION GUIDELINES**

As indicated in Section 224 of the General By-Laws, an applicant does not become a member until approved at a general meeting, or by the branch Executive Committee (when regular monthly meetings of the branch are not held), dues have been paid and the applicant has been initiated in accordance with the procedures laid down in The Ritual and Insignia Manual.

The following guidelines have been established to assist branches with the initiation process.

Upon approval of a membership application and payment of membership dues, the branch should make the applicant aware that in order for the application process to be completed the applicant must be initiated. The branch should then arrange an appropriate time for the initiation. This can be done at a general meeting or if a general meeting is not scheduled for some time, or the applicant is not available to attend the next general meeting, the initiation can be done at any time by the branch President or an officer designated by the President with a witness present.

It is recognized that an initiation is more meaningful if done with other members of the branch and even friends and family present; however, if this is not feasible in a timely manner, other arrangements should be made to accommodate the applicant in getting initiated, in order to become a member. The important thing to remember is that the applicant is not a member until initiated and should not be given a membership card or allowed to participate in branch activities including attendance at branch meetings. If every reasonable attempt has been made by the branch to get the applicant initiated and the applicant either refuses or makes no effort to be initiated, the branch should void the application and/or refuse to accept the next year's renewal payment. However, an applicant cannot be penalized if the branch fails to provide reasonable opportunity to be initiated. For this reason, a branch should retain copies of any notification to the applicant concerning initiation.

#### LIFE MEMBERSHIP - DECEASED MEMBER

Subsection 205.a.i. of The General By-Laws indicates that if a member dies between the time a Life Membership Application is approved by Provincial Command, but before submission to Dominion Command, no per capita tax is payable and the branch will receive a Life Membership Certificate. This means that the branch may still recognize the recipient of the Life Membership Award posthumously, by presenting the deceased member's family with a Life Membership Certificate.

In order to receive a Life Membership Certificate for presentation to the family, the branch should submit the duly approved Life Membership Application Form to the Membership Section at Dominion Command with a Member Data Change Form indicating that the member is deceased.

**Note:** A branch will not be refunded if a Life member dies after per capita tax has been submitted to Dominion Command.

### LONG SERVICE AWARDS

Dominion Command records the number of years of continuous service with which a member may be recognized by showing this number on Membership Cards and in Branch Membership Registers.

Currently, all categories of membership listed in the General By-Laws, earn years of service for continuously supporting the Legion without interruption of payment of dues; however, this was not always the case. Some categories, such as Fraternal Affiliates, Honorary and Meritorious Life members did not accumulate years of service. These members only began accumulating years of service when their category changed to one that did earn years of service.

The membership lapel pin, indicating membership category, can be replaced by a similar pin but with the number of continuous years indicated in the center. These pins are available in five year increments, for example, the first pin would be awarded at five years continuous service, the second at ten years, etc.

#### The Royal Canadian Legion

The branch Honours and Awards Committee may present long service pins to members at anytime during the year in which the milestone year has been achieved.

Branches may purchase long service pins through the Supply Department with the exception of NF/LAB who must contact their Provincial Command office.

See "Years of Continuous Service" for more details.

### **MEMBERSHIP DUES/PER CAPITA TAX**

Annual membership dues consist of branch dues, Provincial per capita tax and Dominion Command per capita tax, which includes a subscription to LEGION Magazine. Each branch may set its own dues amount. All categories of membership must be charged the same amount; however, branches may have special rates based on age, Early Birds etc, which must also apply to all categories.

### MISCONDUCT

Article 15:01 of Queen's Regulations - Reason for Release:

- a. Sentenced to Dismissal Applies to the release of a member of the Forces when sentenced by a Court Martial to dismissal or dismissal with disgrace.
- b. Service Misconduct Applies when a member of the Forces is convicted by a service tribunal of a serious offense, or offenses, or when convicted by a civil power of a serious offence related to the performance of his duties, that warrants release under this category.
- c. Illegally Absent Applies when a member of the Forces has been illegally absent and will not be required for further service under existing service policy.
- d. Fraudulent Statement on Enrolment Applies when a member of the Forces, at time of enrolment, made a fraudulent statement which having regard to the circumstances under which it was made and its effects, warrants release under this item. False statement as to age or a minor oversight or ambiguous statement made through enthusiasm to join the Forces should not result in release under this category.

### SPOUSE

Someone related through marriage (either of two persons who are married to each other) or someone in a Common Law relationship who can establish cohabitation for a period of not less than one year.

#### YEARS OF CONTINUOUS SERVICE

Members of the Legion earn years of service based on continuous payment of Legion Dues. The first year is credited at the time the first payment is processed at Dominion Command and is increased by one each time per capita tax is processed. The membership year runs from 1 January to 31 December. Dues are payable by January 1<sup>st</sup> and a member is no longer in good standing if payment is not received by 31 January. A member may pay arrears for the current and immediate preceding two years only in order to retain years of continuous service, providing these payments result in no break in service. If a membership lapses causing a break in service, the member may reinstate his/her membership for the current year only. Upon reinstatement all previous years of service are disqualified and the member is given one year service at the time of reinstatement.

When a member's category changed to one that qualified for years of service, the years began accumulating at the time the change was made.

The following indicates the year that membership categories began accumulating years of service to assist in determining the maximum number of years of continuous service possible:

Ordinary	- 1926
Associate	- 1973
Affiliate Voting	- 1998
Affiliate Non-Voting	- 1998 *

\* The Associate Non-Voting category was eliminated in 1998 and these members were "grandfathered" into the Affiliate Non-Voting category; therefore, these members may have accumulated years of service prior to 1998 but not before 1973.

**Note**: Associate Non-Voting membership pertained only to those with specific military service but who were not Canadian citizens or Commonwealth subjects; therefore, these members cannot transfer to a voting category unless their citizenship status has changed.

### **MEMBER PRIVILEGES**

PRIVILEGES	CATEGORY
Vote & hold office at all levels	All categories except affiliate non-voting and Meritorious life
Vote at branch level only	Meritorious life
Attend branch meetings	All categories
Chair branch committees	All categories except affiliate non-voting and Meritorious life
Serve on committees	All categories
Sports at all levels	All categories except Meritorious life
Sports at branch level only	Meritorious life
Wear Legion dress	All categories
Apply for Transfer	All categories except Meritorious life
Pre-pay (up to 5 years) & Pay arrears (2 years)	All categories
New members pay half year dues (after 30 June)	All categories
New members pay one-third year dues (after 31 August)	All categories

**Note**: A member does not have the automatic privilege to attend another branch; however, may do so as a guest at the discretion of that branch.

## **NON-MILITARY SERVICES**

Canadian citizens or commonwealth subjects who served in an actual theatre of war in which Canada was engaged are eligible for Ordinary membership, for example:

Air Raid Wardens	Naval auxiliaries
Civil Nursing Reserve	Overseas forestry units
Corps of Canadian Fire Fighters	Red Cross
Ferry Command	Reserve/deep sea salvage tugs
Fishery patrol	Saint John Ambulance
Home Guard	Salvation Army
Knights of Columbus	War correspondents
Legion War Services	Women's Land Army
Merchant Navy	Y.M.C.A.
National Fire Services	

## PROOF OF ELIGIBILITY REQUIREMENTS

TYPE OF MEMBERSHIP	QUALIFY BY	DOCUMENTATION REQUIRED
Ordinary	Self	- Proof of citizenship.
		<ul> <li>Service record and/or discharge certificate.</li> </ul>
Associate	Family	<ul> <li>Proof of citizenship.</li> </ul>
	Member	<ul> <li>Service record and/or discharge certificate of person who is or was eligible for ordinary membership</li> </ul>
		<ul> <li>Marriage, birth or adoption certificates to establish relationship to person who is or was eligible for ordinary membership; or</li> </ul>
		<ul> <li>Marriage, birth or adoption certificates to establish relationship to associate member.</li> </ul>
Associate	Common	<ul> <li>Proof of citizenship.</li> </ul>
	Law Spouse	<ul> <li>Verification that applicant has co- habited with the other person for minimum of one year; i.e., Income tax return, mortgage, lease, mailing address</li> </ul>
Associate	Navy	<ul> <li>Proof of citizenship.</li> </ul>
	League	<ul> <li>Documentation indicating rank of officer and that the two year service requirement has been met.</li> </ul>
Associate	Cadet	- Proof of Citizenship.
	Cadet Civilian Instructor	<ul> <li>Documentation or a letter of confirm- ation from the Commanding Officer of Cadet unit indicating that the three year service requirement has been met.</li> </ul>
Associate	Polish	<ul> <li>Proof of citizenship.</li> </ul>
	Forces	<ul> <li>Service record and/or discharge certificate indicating rank and dates of service.</li> </ul>
Associate	Firefighters	- Proof of citizenship.
		<ul> <li>Documentation indicating service and that the one year service requirement has been met.</li> </ul>
Affiliate Voting	Self	- Proof of citizenship
Affiliate Non-Voting	Self	<ul> <li>Proof of citizenship</li> </ul>

### MILITARY SERVICE QUALIFICATIONS FOR ORDINARY MEMBERSHIP

If service is during a specific time period, the dates are included. If service is from a specific date on, it is marked with the date and a hyphen (i.e., 1949 -). For definition of \*, please refer to notes following this table.

COUNTRY	DATES	THEATRES
CANADA:		
<ul> <li>Regular Forces and Reserve Class "C" Service</li> </ul>		All
<ul> <li>Reserve Forces including Cadet Instructors Cadre (List) - after one year of service</li> </ul>		All
<ul> <li>Officer Training Corps (OTC)</li> </ul>	After 1946	
- OTC prior to 1946	Not Eligible	
<ul> <li>Canadian Volunteers</li> </ul>	4 Aug 1914 - 31 Aug 1921	WWI
- Canadian Conscript Service in Canada	1914 - 1918	WWI
<ul> <li>N.R.M.A. (National Resources Mobilization Act) Personnel</li> </ul>	1939 - 1945	WWII
<ul> <li>Newfoundland - Newfoundland Militia or Newfoundland Regiment 1943, if volunteered and served on active service</li> </ul>	1939 - 1945	WWII
<ul> <li>The Royal Newfoundland Constabulary</li> </ul>	1918 -	All
<ul> <li>NORAD (North American Air Defence Command)</li> </ul>	1957 -	
<ul> <li>RCMP (NWMP) including those called for military service by DND and detailed to the RCMP - after one year of service</li> </ul>	1918 -	All
BRITAIN:		
<ul> <li>Her Majesty's Forces</li> </ul>	1899 -	All
<ul> <li>British Territorial Service</li> <li>after one year of service</li> </ul>		
- British Women's Auxiliary Army Corps		All
<ul> <li>Queen Alexandra's Military Nursing Service</li> </ul>	1914 - 1918	WWI
<ul> <li>See also those units listed under table for"Non-Military Services"</li> </ul>		

COUNTRY	DATES	THEATRES
AUSTRALIA:		
<ul> <li>– (Her Majesty's Forces)</li> </ul>	1931 -	All
<ul> <li>Vietnam (see Subsection 206.h. of the General Bylaws)</li> </ul>	Nov 1961 - May 1975	Vietnam
BELGIUM: (ALLIES)		
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1949 -	
CAUCASUS NW:		
	1914 - 1918	WWI
CROATIA:		
	Not Eligible	
CZECHOSLOVAKIA: (ALLIES)		
<ul> <li>Czech National Forces</li> </ul>	4 Aug 1918 - 11 Nov 1918	WWI
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
CZECH REPUBLIC		
– NATO	1999	
DENMARK: (ALLIES)		
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1949 -	
FRANCE: (ALLIES)		
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1949 -	
GERMANY:		
<ul> <li>East Germany (German Democratic Republic)</li> </ul>	Not Eligible	
<ul> <li>West Germany (Federal Republic of Germany) - NATO</li> </ul>	1955	
<ul> <li>Unified Germany - NATO</li> </ul>	1990	
GREECE: (ALLIES)		
<ul> <li>Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1952 -	

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COUNTRY	DATES	THEATRES	
HONG KONG:	·		
<ul> <li>Her Majesty's Forces</li> </ul>	1914 - 1930 June 1997		
– After 1 July 1997	Not Eligible		
- Volunteer Units	1939 - 1945	WWII	
HUNGARY:			
– NATO	1999 -		
ICELAND:			
– NATO	1949 -		
INDIA:			
<ul> <li>Her Majesty's Forces</li> </ul>	1914 - 1918 1945 - 1950	WWI	
– After 1950	Not Eligible		
IRELAND:			
<ul> <li>Royal Irish Constabulary and Special Constabulary</li> </ul>	Not Eligible		
ITALY: (ALLIES)			
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI	
<ul> <li>Italians who, after liberation of Italy, served with the Italian Army under Allied Command</li> </ul>	13 Oct/43 - 14 Aug/45	WWII	
– NATO	1949 -		
JAVA:			
- Volunteer Units	1939 - 1945	WWII	
KOREA:			
– Vietnam (see item 206.h.)	Nov 1961 -	Vietnam	
	May 1975		
LITHUANIA:			
	Not Eligible		
LUXEMBOURG: (ALLIES)			
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII	
– NATO	1949 -		
MALAYA:			
- Colonial Police Forces	Not Eligible		

COUNTRY	DATES	THEATRES
NETHERLANDS: (ALLIES)		
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1949 -	
NEW ZEALAND:		
<ul> <li>Vietnam (see Subsection 206.h. of the General Bylaws)</li> </ul>	Nov 1961 - May 1975	Vietnam
NORWAY: (ALLIES)		
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1949 -	
PALESTINE:		
- Colonial Police Forces	Not Eligible	
PERSIA: (ALLIES)		
	1914 - 1918	WWI
POLAND: (ALLIES)		
<ul> <li>Polish Insurgents, Irregulars</li> </ul>	Not Eligible	
<ul> <li>Polish National Forces</li> </ul>	Not Eligible	
<ul> <li>Poles conscripted for service with the Germans who later served under Allied Command</li> </ul>	1939 - 1945	WWII
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
– NATO	1999 -	
PORTUGAL: (ALLIES)		
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI
– NATO	1949 -	
ROMANIA: (ALLIES)		
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI
RUSSIA: (ALLIES)		
<ul> <li>Imperial Army &amp; Navy</li> </ul>	1914 - 1918	WWI
– Russia - North	1939 - 1945	WWII
<ul> <li>*Forces operating with the allies</li> </ul>	1939 - 1945	WWII
SERBIA: (ALLIES)		
<ul> <li>During period of hostilities</li> </ul>	1914 - 1918	WWI
SINGAPORE:		
- Volunteer Units	1939 - 1945	WWII

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COUNTRY	DATES	THEATRES
SOUTH AFRICA:		
<ul> <li>Her Majesty's Forces</li> </ul>		
- Prior to May 1961	1914 - May 1961	
– After May 1961	Not Eligible	
SPAIN:		
– NATO	1982 -	
SRI LANKA (FORMERLY CEYLON):		
	Not Eligible	
TURKEY:		
– NATO	1952 -	
UNITED KINGDOM:		
– NATO	1949 -	
UNITED STATES: (ALLIES)		
– NATO	1949 -	All
<ul> <li>NORAD (North American Air Defence Command)</li> </ul>	1957 -	All
VIETNAM (SOUTH):		
<ul> <li>– (see Subsection 206.h. of the General Bylaws)</li> </ul>	Nov 1961 - May 1975	Vietnam
YUGOSLAVIA*: (ALLIES)		
	1939 - 1945	WWII

\* Fully embodies Forces operating with the Allies, excluding National Units of such countries which were organized and controlled by Nazi or fascist occupied countries (must have seen active service in theatre of war) AND/ OR underground forces during WWII with any of Her Majesty's allies (must be approved by Provincial and Dominion Commands).

## **CANADIAN WARTIME ALLIED COUNTRIES**

COUNTRY	WWI	WWII
Australia		Sep 3/39
Belgium	Aug 4/14	May 10/40
Bolivia	Apr 13/17	Apr 7/43
Brazil	Oct 20/17	Aug 22/42
China	Aug 14/17	Dec 9/41
Costa Rica	May 23/18	Dec 11/41
Cuba	Apr 7/17	Dec 11/41
Czechoslovakia		Dec 16/41
Dominican Republic		Dec 11/41
Ecuador	Dec 8/17	
El Salvador		Dec 12/41
England	Aug 4/14	Sep 3/39
Ethiopia		Dec 1/42
France	Aug 3/14	Sep 3/39
Greece	Jun 27/17	Oct 28/40
Guatemala	Apr 22/18	Dec 11/41
Haiti	Jul 12/18	Dec 12/41
Honduras	Jul 19/18	Dec 12/41
India		Sep 3/41
Iraq		Jan 17/42
Italy	May 23/15	**
Japan	Aug 23/14	
Liberia	Aug 4/17	
Luxembourg		May 10/41
Mexico		May 22/42
Montenegro	Aug 5/14	
Netherlands		May 10/40

The Royal Canadian Legion

COUNTRY	WWI	WWII
New Zealand		Sep 3/39
Nicaragua	May 8/18	Dec 11/41
Norway		Apr 9/40
Panama	Apr 7/17	Dec 12/41
Peru	Oct 6/17	
Poland		Sep 1/39
Portugal	Mar 9/16	
Romania	Aug 27/16	
Russia	Aug 1/14 - Oct 1/17	
San Marino	Jun 3/15	
Serbia	Jul 28/14	
Siam	Jul 22/17	
South Africia		Sep 6/39
United Kingdom of Great Britian & Northern Ireland	Aug 4/14	Sep 3/39
United States	Apr 6/17	Dec 7/41
Uruguay	Oct 7/17	
USSR		Jun 22/41
Yugoslavia		Apr 6/41

\*\* Some Italians served under Allied Forces; however, Italy was not considered an allied country

## NATO ALLIED MEMBER COUNTRIES

The North Atlantic Treaty Organization (NATO) was formed in 1949 and service is applicable from that date or as otherwise stated.

COUNTRY	DATES	COUNTRY	DATES
Albania		Lithuania	2004
Belgium		Luxembourg	
Bulgaria	2004	Netherlands	
Canada		Norway	
Croatia		Poland	1999
Czech Republic	1999	Portugal	
Denmark		Romania	2004
Estonia	2004	Slovakia	2004
France		Slovenia	2004
Germany (unified)	1990	Spain	1982
Greece	1952	Turkey	1952
Hungary	1999	United Kingdom	
Iceland		United States	
Italy		West Germany	1955
Latvia	2004	(Fed. Rep. of Germany)	

### **WARS & POLICE ACTIONS**

The following identifies wars and police actions in which Canada was involved.

WARS		
South African War	11 Oct 1899 - 31 May 1902	
World War I	04 Aug 1914 - 11 Nov 1918	
World War II	03 Sep 1939 - 14 Aug 1945	
Korean War	25 Jun 1950 - 27 Jul 1953	
Persian Gulf War	16 Jan 1991 - 27 Feb 1991	

<b>UN &amp; COMMONWEALTH POLICE ACTIONS</b>		
Korea	Jul 1953 - Jul 1955	
Gaza	1956 - 1967	
Congo	15 Aug 1960 - 30 Jun 1964	
Cyprus	15 Mar 1964 - 1993	

## **COMMONWEALTH MEMBER COUNTRIES**

The following is a list of Commonwealth member countries and the year of joining. Citizens of these countries and dependant territories are considered Commonwealth subjects and may be eligible for membership.

COUNTRY	YEAR	COUNTRY	YEAR
Antigua & Barbuda	1981	Mozambique (independent 1975)	1995
Australia	1931	Namibia	1990
Bahamas	1931	Nauru	1968
Bangladesh	1973	New Zealand	1931
Barbados	1966	Nigeria	1960
Belize	1981	Pakistan left rejoined	1947 1972 1989
Botswana	1966	Papua New Guinea	1975
Brunei Darussalam	1984	Rwanda	2009
Cameroon (independent 1960)	1995	Samoa (independent 1962)	1970
Canada	1931	St. Kitts & Nevis	1983
Cyprus (independent 1960)	1961	St. Lucia	1979
Dominica	1978	St. Vincent & The Grenadines	1979
Fiji Islands left rejoined suspended suspension lifted suspended	1970 1987 1997 2000 2001 2006	Seychelles	1976
The Gambia	1965	Sierra Leone	1961
Ghana	1957	Singapore	1965
Grenada	1974	Solomon Islands	1978
Guyana	1966	South Africa left rejoined	1931 1961 1994
India	1947	Sri Lanka	1948
Jamaica	1962	Swaziland	1968
Kenya	1963	Tanzania	1961
Kiribati	1979	Tonga	1970
Lesotho	1966	Trinidad & Tobago	1962
Malawi	1964	Tuvalu	1978
Malaysia	1957	Uganda	1962
Maldives (independent 1965)	1982	United Kingdom	1973
Malta	1964	Vanuatu	1980
Mauritius	1968	Zambia	1964
		Zimbabwe left	1980 2003

### **AUSTRALIAN EXTERNAL TERRITORIES**

Australian Antarctic Territory Christmas Island Cocos (Keeling) Islands Coral Sea Islands Territory Heard Island and McDonald Islands Norfolk Island The Territory of Ashmore and Cartier Islands

### SELF GOVERNING COUNTRIES IN FREE ASSOCIATION WITH NEW ZEALAND

Cook Islands Niue **Note**: The Island Territory of Tokelau and The Ross Dependancy are administered as part of New Zealand

#### **BRITISH DEPENDANT TERRITORIES**

Anguilla Bermuda British Antarctic Territory British Indian Ocean Territory British Virgin Islands Cayman Islands Ducie and Oeno Islands Falkland Islands Gibraltar Henderson Montserrat Pitcairn Island St Helena and Dependencies (Ascension, Tristan da Cunha) South Georgia and the South Sandwich Islands Turks and Caicos Islands

## **HISTORY OF MEMBERSHIP CATEGORIES**

Originally membership in The Royal Canadian Legion was restricted to war veterans only; however, eligibility and categories of membership have evolved over the years. The following table shows the year eligibility and/or categories were changed, added or deleted.

Unless otherwise stated, membership was open to Canadian citizens or British/Commonwealth subjects only.

YEAR	CATEGORY	WHO IS ELIGIBLE
1926	Ordinary	<ul> <li>Wartime Service in:</li> <li>His Majesty's Armed Forces, His Majesty's Auxiliary Armed Forces (6 years service), RCMP, Merchant Navy &amp; Fishery Patrol (outside examination areas), Red Cross, St John's &amp; St Andrew's Ambulance, His Majesty's Allied Forces (3 months)</li> </ul>
1926	Life	<ul> <li>Awarded to ordinary members by Dominion Convention or Executive Council</li> </ul>
1926	Associate (no Vote)	<ul> <li>His Majesty's Armed Forces - Regular &amp; Auxiliary</li> </ul>
1926	Honorary (no vote)	<ul> <li>Awarded by branch to those who support aims &amp; objects of RCL</li> </ul>
1926	Women	<ul> <li>Women's Auxiliary under control of branches &amp; Provincial Commands</li> </ul>
1928	Ordinary	<ul> <li>His Majesty's Auxiliary Armed Forces (3 years)</li> </ul>
1928	Life	<ul> <li>Awarded to ordinary members by the branch</li> </ul>
1928	Junior	<ul> <li>Junior Auxiliary under control of Branches &amp; Provincial Commands</li> </ul>
1929	Ordinary	- RCMP (3 years)
1938	Ordinary	- His Majesty's Armed Forces (3 years)
1944	Ordinary	<ul> <li>Wartime Service in:</li> <li>Corps of Canadian Fire Fighters (British service)</li> <li>(US citizen) - served with Allied Force and who was the child of an ordinary member</li> </ul>

YEAR	CATEGORY	WHO IS ELIGIBLE
1944	Ordinary	<ul> <li>(US citizen) - active service in an Allied Force (3 months) &amp; who is the parent, spouse or child of an RCL member in good standing</li> </ul>
1944	Active Service Associate (no vote)	<ul> <li>Service in Canada in:</li> <li>Canadian Active Service Force, His Majesty's Armed Forces, His Majesty's Allied Forces</li> </ul>
1946	Ordinary	Wartime Service in: – War Correspondents, Auxiliary Services
1946	Ordinary	<ul> <li>RCMP - no longer eligible (see 1970 and 1972)</li> </ul>
1946	Associate (no vote)	<ul> <li>His Majesty's Armed Forces</li> <li>(3 years) (formerly ordinary)</li> </ul>
1948	Associate (no vote)	<ul> <li>- (Non-Canadian citizen) - Wartime</li> <li>Service in an Allied Force</li> </ul>
1948	Active Service Associate	– Eliminated
1950	Active Service Associate	<ul> <li>Active Service Forces of Canada while serving in Canada</li> <li>Allied Force while serving in Canada</li> </ul>
1952	Ordinary (US Posts Only)	<ul> <li>Wartime Service in:</li> <li>(US citizen) - active service in an Allied Force (3 months) &amp; who is the parent, spouse or child of an RCL member in good standing or of a veteran who was eligible for membership</li> </ul>
1954	Ordinary	- Wartime service in Ferry Command
1958	Honorary Life	<ul> <li>Awarded by D.E.C. for outstanding national service</li> </ul>
1960	Ordinary	<ul> <li>Wartime service in Newfoundland Forestry (overseas) Unit and who was awarded the Defence Medal</li> <li>Her Majesty's Armed Forces - British National Service Act (2 years)</li> </ul>
1964	Ordinary	<ul> <li>United Nations or Commonwealth police action in Korea, Congo, Gaza, Cyprus</li> <li>Wartime service in underground forces with Allied Forces &amp; Non-Military Services (See Military Service Qualifications for Ordinary Membership, page 14.)</li> </ul>

#### The Royal Canadian Legion

YEAR	CATEGORY	WHO IS ELIGIBLE
1966	Ordinary (US Posts Only)	<ul> <li>– (US citizen) - Wartime service in US Armed Forces under command of Commonwealth Naval, Army or Air Force Commander</li> </ul>
1966	Associate (no vote)	<ul> <li>Regular Armed Forces - presently serving</li> <li>Reserves (3 years)</li> <li>(US citizen) - Allied Forces (3 months) while residing in Canada</li> <li>(Non-Canadian citizen) - Allied Forces (3 months)</li> </ul>
1966	Meritorious Life	<ul> <li>Awarded to honorary members for outstanding service to the branch</li> </ul>
1966	Active Service Associate	– Eliminated
1968	Ordinary	<ul> <li>Regular Force of Canada - still serving (2 years)</li> <li>Her Majesty's Armed Forces - British National Service Act (18 Months)</li> </ul>
1970	Ordinary	<ul> <li>Wartime service in Newfoundland Militia</li> </ul>
1970	Associate (no vote)	<ul> <li>(US citizen) - US Regular Armed Forces serving in Canada</li> <li>RCMP, forces under the command of NATO or NORAD</li> </ul>
1972	Ordinary	<ul> <li>Regular Force of Canada (time eliminated)</li> <li>Her Majesty's Reserves (2 years)</li> <li>RCMP (2 years)</li> </ul>
1972	Associate (no vote)	<ul> <li>Wartime service in Newfoundland Forestry (overseas) Unit and who were not awarded the Defence Medal</li> </ul>
1972	Fraternal Affiliate	<ul> <li>Those not eligible for ordinary or associate membership (passed in 1970, not effective until January 1, 1972)</li> </ul>
1973	Associate (no vote)	<ul> <li>Child of a person who is or was eligible for ordinary membership (passed in 1972, not effective until 1973)</li> </ul>
1974	Associate (no vote)	<ul> <li>Child, includes adopted, step and foster child of a person who is or was eligible for ordinary membership</li> </ul>

YEAR	CATEGORY	WHO IS ELIGIBLE
1978	1978 Ordinary (US Posts Only)	<ul> <li>(US citizen) -</li> <li>Wartime service in Her Majesty's Armed Forces &amp; Her Majesty's allied &amp; underground forces</li> <li>United Nations or Commonwealth police action in Korea, Congo, Gaza, Cyprus</li> <li>US Armed Forces &amp; who is the parent, spouse or child of someone who is or</li> </ul>
		<ul> <li>Just a second control is of a software was a software of control in the software was a software wa</li></ul>
1978	Associate-Voting (vote at branch level only)	<ul> <li>Child, includes adopted, step and foster child of a person who is or was eligible for ordinary membership</li> </ul>
1978	Associate Non-Voting	<ul> <li>Wartime service in Her Majesty's Allied Forces (3 months)</li> <li>US Regular Armed Forces while serving in Canada</li> <li>Force under the Command of NATO or NORAD (3 months)</li> <li>Newfoundland Forestry (overseas) unit but who was not awarded the Defence Medal</li> </ul>
1980	Associate Voting (vote at all levels)	<ul> <li>Child, includes adopted, step and foster child of a person who is or was eligible for ordinary membership</li> </ul>
1982	Associate Voting	<ul> <li>Elimination of foster children</li> </ul>
1982	Associate Voting	<ul> <li>Spouse, widow/er of a life or ordinary member</li> </ul>
1984	Life	<ul> <li>Associate voting members for outstanding service</li> </ul>
1984	Ordinary	<ul> <li>Wartime service Newfoundland Regiment, 1943</li> </ul>
1984	Associate Voting	<ul> <li>US Posts only (US citizens)</li> <li>Child - includes adopted &amp; step child of a person who is or was eligible for ordinary membership</li> <li>Spouse, widow/er of a life or ordinary member</li> </ul>

#### The Royal Canadian Legion

YEAR	CATEGORY	WHO IS ELIGIBLE
1986	Associate Voting	<ul> <li>Widow/er of a life or ordinary member or those who were eligible for ordinary or active service associate membership (now ordinary)</li> </ul>
1988	Ordinary	<ul> <li>Her Majesty's Reserve Forces - (1 year)</li> </ul>
1988	Associate Voting	<ul> <li>Spouse of person who is or was eligible for ordinary membership</li> <li>Spouse of an associate member</li> </ul>
1000		(common law marriage not recognized)
1990	Associate Voting	<ul> <li>Cadets - Royal Canadian Navy, Army &amp; Air Cadets - (3 years)</li> </ul>
1992	Ordinary	– RCMP - (1 year)
1992	Associate Voting	<ul> <li>Grandchild of a person who is or was eligible for ordinary membership</li> </ul>
1994	Ordinary	<ul> <li>Her Majesty's Reserve Forces Class "C" service</li> </ul>
		- Royal Newfoundland Constabulary
1994	Ordinary	<ul> <li>Vietnam War - Nov 1961 - May 1975 Canadian citizens who served in Vietnam with Armed Forces of US, Australia, New Zealand, Republic of Korea or South Vietnam</li> </ul>
1994	Associate Voting	<ul> <li>Sibling of a person who is or was eligible for ordinary membership</li> <li>Officer in Navy League of Canada (2 years)</li> </ul>
1996	Ordinary	<ul> <li>Armed Forces of NATO or NORAD</li> </ul>
		<ul> <li>United States Armed Forces</li> </ul>
1996	Associate Voting	<ul> <li>Parent of a person who is or was eligible for ordinary membership, police officers, children of associate members, Polish Armed Forces below rank of officer</li> </ul>
1998	Associate Voting	<ul> <li>Nieces &amp; nephews of a person who is or was eligible for ordinary membership, parents and siblings of associate members, Civilian Cadet Instructors (3 years) (Common-law spouse after 1 year cohabitation now recognized)</li> </ul>
1998	Associate Non-Voting	<ul> <li>Eliminated - Grandfathered into new affiliate non-voting category</li> </ul>

YEAR	CATEGORY	WHO IS ELIGIBLE
1998	Fraternal Affiliate	<ul> <li>Eliminated - Grandfathered into new affiliate non-voting category</li> </ul>
1998	Affiliate Non- Voting (new)	<ul> <li>Those who do not qualify under other categories but support the aims and objects of RCL</li> </ul>
1998	Affiliate Voting (new)	<ul> <li>Affiliate non-voting members may apply for affiliate voting status after 2 or more years of continuous service</li> </ul>
1998	Meritorious Life (vote at branch level)	<ul> <li>Meritorious Life members granted voting rights at branch level only</li> </ul>
2000	Ordinary	<ul> <li>Provincial, municipal and city police officers after one year service (previously Associate)</li> </ul>
2000	Ordinary	<ul> <li>The Canadian Coast Guard as an officer or crew member, and who has two or more years of active service on the high seas or inland waterways</li> </ul>
2000	Honorary	<ul> <li>Eliminated - Grandfathered into Affiliate Non-Voting category</li> </ul>
2000	Meritorious Life	<ul> <li>Eliminated - No new Meritorious Life memberships to be awarded. Category to be eliminated by attrition</li> </ul>
2002	Associate	<ul> <li>City, municipal, federal, volunteer or unorganized territories Fire Services, for not less than one year</li> </ul>
2006	Affiliate Voting	<ul> <li>Canadian citizens and Commonwealth subjects</li> </ul>
		<ul> <li>24 month service requirement eliminated for Affiliate Voting Membership</li> </ul>
2006	Affiliate Non-Voting	<ul> <li>Non- Canadian citizens /non</li> <li>Commonwealth subjects from an</li> <li>Allied Country now eligible to apply for</li> <li>membership (may not apply for Voting status)</li> </ul>
2010	Associate	<ul> <li>City, municipal, unorganized territories, provincial or federal Emergency Response Service, for not less than one year</li> </ul>

## **SERVICE RECORDS**

Dominion Command does not have access to Military Service Records. Applicants or next of kin may obtain statements of service from the following sources. Please include as much information as possible in your initial contact with these agencies:

#### CANADA - MILITARY SERVICE

Services Branch	n - Personnel Records Unit
Library and Arc	hives Canada
395 Wellington	Street
Ottawa, Ontari	o, K1A ON4
Phone:	(613) 996-5115
Fax:	(613) 995-6274
Website:	www.collectionscanada.gc.ca
Toll free:	1-866-578-7777 (Can & US)
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#### CANADA - MERCHANT NAVY

Merchant Navy Registry PO Box 7700 Charlottetown, PE C1A 8M9 Phone: (902) 626-2446 Fax: (902) 368-0564 Toll free: 1-866-522-2122(English) or 1-866-522-2022 (French)

#### **GREAT BRITAIN**

Ministry of Defe	ence
Service Person	nel and Veterans Agency
Norcross, Black	pool
England FY5 3	WP
Phone:	11-44-1253-866-043 (overseas)
Help Line:	0800 169 2277
E-Mail:	help@veteransagency.gsi.gov.uk
Website:	www.mod.uk/DefenceInternet/DefenceFor/Veterans

#### UNITED STATES

National Archiv	es and Records Administration
<b>Military Person</b>	nel Records
8601 Adelphi R	oad
College Park, M	ID. 20740-6001 USA
Phone:	1-866-272-6272
Fax:	301-837-0482
Website:	www.archives.gov/veterans

# PART II PROCESSING GUIDE

PART II of this manual is intended for the Branch Secretary, the Branch Membership Chairman and other Branch or Provincial Command personnel who are involved in administrative duties dealing with membership. It illustrates sample forms that are used in the Legion's membership processing system, explains how they should be completed and submitted and contains many helpful hints on ways to make the system better for you and the member.

It is important to ensure that the appropriate forms are completed and submitted to Dominion Command in order to ensure that memberships are processed in a timely fashion. The various forms required to process membership are supplied by Dominion Command and can be ordered free of charge from the Supply Department. Items available for order can be found on the Supply Requisition Form.

The Branch Membership Chairman should review the General-By-Laws and the Eligibility Guide to ensure that the correct procedures are followed when completing application forms for new and reinstated members. The membership processing forms are designed specifically for providing information from the branch to Dominion Command computer system. They are the communication link required to ensure that the information required by Dominion Command is stated and processed in the most efficient way possible. Thousands of transactions are handled daily by the membership staff and it is important that the information be stated clearly and fully. The appropriate form must accompany every transaction submitted to Dominion Command.

This Guide is by far the most useful tool when processing membership transactions and anyone dealing with membership at the branch should make constant use of it. Most processing errors could be avoided by referring to this guide.

# **CHAPTER 1**

### FORMS

The following figures illustrate the Membership forms available from the Legion Supply Department.

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FIGURE 1-1 — MEMBER REGISTRATION FORM

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FIGURE 1-2 — MEMBER DATA CHANGE FORM

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FIGURE 1-3 — BRANCH TRANSMITTAL FORM

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Recommend / Reco	ommandé:			Date:		
	Provincial Command Comité des Honneurs et R		vards Committee /			
Signature:			Signature:			
	Zone Commander / Commandant du Zone	e		mander / Comn	nandant du dis	strict
March / Mars 2015	800282				leg	gion.ca

#### FIGURE 1-4 — LIFE MEMBERSHIP APPLICATION FORM

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FIGURE 1-5 — MEMBERSHIP APPLICATION FORM

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Branch Phone No:		ch Secretary:	
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Approval of Ernach Membership Commo	tre:		Dure:
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		rting PSIOR to submission to	Dominian Command. Transfer connot
Please Note: Transfer Application must be canceled once processed by Dominio	I LOTITICIANE.		
	- Louiseant		

### FIGURE 1-6 — APPLICATION FOR TRANSFER FORM



FIGURE 1-7 — MEMBERSHIP RENEWAL CARD

time posts the entries in a searchable dat		int twice a year, in the spring and fail, and www.legionmagizine.com	int th
Last Post is reserved for these groups:	1) Ordinary members	of The Royal Canadian Legion at time of and 3) Canadian war veterans (WW )	
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FIGURE 1-8 — LAST POST DEATH NOTICE

## HOW TO COMPLETE A MEMBERSHIP APPLICATION FORM

### DESCRIPTION

Anyone applying for membership must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws.

Ensure that all eligibility documentation is attached, proof of citizenship has been established and the Privacy Statement has been completed.

The application must be proposed and seconded by voting members of the branch.

Once the application has been approved by all the appropriate parties, this and any other required eligibility documentation is to be maintained by the branch in the member's file; do not send to Dominion Command.

Branches must use a Member Registration Form to register a new/ reinstated member at Dominion Command.

## FORMS TO USE

201. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)

## PROCESS

- 202. ORDINARY MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-1 and 2-2) In order to apply for Ordinary membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;

- e. Complete Section D & E and Page 2 of application form;
  - i. Section "D" tick the appropriate box to indicate the documentation that was provided as proof of eligibility;
  - ii. Section "E"- Provide service information indicate the applicable area; and
  - iii. Proceed to page 2 of the application form.
- f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
- g. If Legion Magazine is not required, tick box;
- h. Signatures;
  - i. Application form must be signed and dated by the applicant;
  - ii. Provide proposer's name Proposer must sign and date the application form; and
  - iii. Provide seconder's name Seconder must sign and date the application form.
- i. Record of Legion Service complete this section for members who are reinstating;
- j. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- k. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;

#### The Royal Canadian Legion

- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

(All app		ASSOCIATE Pages 1 AND 2 - Type		TE VOTING	AFF	ILIATE NON-V	OTING	C. C. C.
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FIGURE 2-1 — MEMBERSHIP APPLICATION FORM (FRONT) FOR ORDINARY MEMBERSHIP

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#### FIGURE 2-2 — MEMBERSHIP APPLICATION FORM (BACK) FOR ORDINARY MEMBERSHIP

#### The Royal Canadian Legion

- 203. ASSOCIATE MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-3 and 2-4) In order to apply for Associate membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;
  - e. Complete Sections "A" or "B" or "C" and Page 2 of application for;
    - Section "A" tick the appropriate box to indicate the type of service. If you complete this section then you must also complete Sections "D & E";
    - Section "B" Provide member information by ticking the appropriate box. If you complete this section then you must also complete Sections "D & E";
    - Section "C" tick the appropriate box as it pertains to the applicant. If you complete this section, you must also complete Section "D";
    - iv. Section "D" tick the appropriate box to indicate the documentation that was provided as proof of eligibility;
    - v. Section "E" Provide service information indicate the applicable area; and
    - vi. Proceed to page 2 of the application form.
  - f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
  - g. If Legion Magazine is not required, tick box;
  - h. Signatures Required;
    - i. Application form must be signed and dated by the applicant;

- ii. Provide proposer's name Proposer must sign and date the application form; and
- iii. Provide seconder's name Seconder must sign and date the application form.
- i. Record of Legion Service Complete this section for members who are reinstating;
- j. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- k. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

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FIGURE 2-3 — MEMBERSHIP APPLICATION FORM (FRONT) FOR ASSOCIATE MEMBERSHIP

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Applicant's Signature:					2010
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#### FIGURE 2-4 — MEMBERSHIP APPLICATION FORM (BACK) FOR ASSOCIATE MEMBERSHIP

#### The Royal Canadian Legion

- 204. AFFILIATE VOTING MEMBERSHIP—MEMBERSHIP APPLICATION FORM (See Figures 2-5 and 2-6). In order to apply for Affiliate Voting membership the applicant must be a Canadian Citizen or Commonwealth subject.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;

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FIGURE 2-5 — MEMBERSHIP APPLICATION FORM (FRONT) FOR AFFILIATE VOTING MEMBERSHIP

- c. Complete the member information section for the person applying for membership;
- d. Select the activities in which the member has indicated an interest;
- e. Do not complete Sections A, B, C, D or E. Go to Page 2;

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#### FIGURE 2-6 — MEMBERSHIP APPLICATION FORM (BACK) FOR AFFILIATE VOTING MEMBERSHIP

- f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
- g. If applicant is not eligible for Ordinary / Associate membership, tick box;
- h. If Legion Magazine is not required, tick box;
- i. Signatures Required;
  - i. Application form must be signed and dated by the applicant;
  - ii. Provide proposer's name Proposer must sign and date the application form; and
  - iii. Provide seconder's name Seconder must sign and date the application form.
- j. Record of Legion Service complete this section for members who are reinstating;
- k. Have you been expelled from any Legion Branch or other Veteran's organization – you must answer "yes or no". If "yes" provide the branch/organization information; and
- I. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.

All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

- i. Application form must be signed by the Branch Membership Committee;
- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

- 205. AFFILIATE NON-VOTING MEMBERSHIP—MEMBERSHIP APPLICA-TION FORM (See Figures 2-7 and 2-8). This category of membership is for non-Canadian Citizens or non-Commonwealth subjects who are citizens of an Allied Nation. Please refer to pages 36 and 42 in the Eligibility Guide for applicants that qualify under NATO Allied Member Countries or Canadian Wartime Allied Countries.
  - a. Select the box at the top of the form to indicate membership category;
  - b. Complete the branch information section;
  - c. Complete the member information section for the person applying for membership;
  - d. Select the activities in which the member has indicated an interest;
  - e. Do not complete Sections A, B, C, D or E. Go to Page 2;
  - f. Complete the Privacy Statement This is a mandatory requirement. Applicant must complete and sign this section. Members cannot be processed without this information;
  - g. If applicant is not eligible for Ordinary / Associate membership, tick box;
  - h. If Legion Magazine is not required, tick box;
  - i. Signatures Required;
    - i. Application form must be signed and dated by the applicant;
    - ii. Provide proposer's name Proposer must sign and date the application form; and
    - iii. Provide seconder's name Seconder must sign and date the application form.
  - j. Record of Legion Service complete this section for members who are reinstating;
  - k. Veteran's organization you must answer "yes or no". If "yes" provide the branch/organization information ; and
  - I. Complete the Section "For Branch Use".

The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise. All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.

When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.

i. Application form must be signed by the Branch Membership Committee;

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FIGURE 2-7 — MEMBERSHIP APPLICATION FORM (FRONT) FOR AFFILIATE NON-VOTING MEMBERSHIP

- ii. The application must be presented at a General Meeting of the Branch for approval or otherwise;
- iii. Record the date the member was initiated;
- iv. Record the amount of the membership dues paid; and
- v. Indicate the date that the Registration Form and Per Capita Tax was submitted to Dominion Command.

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#### FIGURE 2-8 — MEMBERSHIP APPLICATION FORM (BACK) FOR AFFILIATE NON-VOTING MEMBERSHIP

# HOW TO REMIT PER CAPITA TAX

## DESCRIPTION

A Branch Transmittal Form must accompany all membership payments sent to Dominion Command. This includes new member, renewals (includes renewal cards and Member Registration Forms), reinstatements, Life, supplementary and duplicate card payments. The form is used to summarize payments contained in the submission, record any debits or credits being considered, and record the cheque number and the amount being submitted.

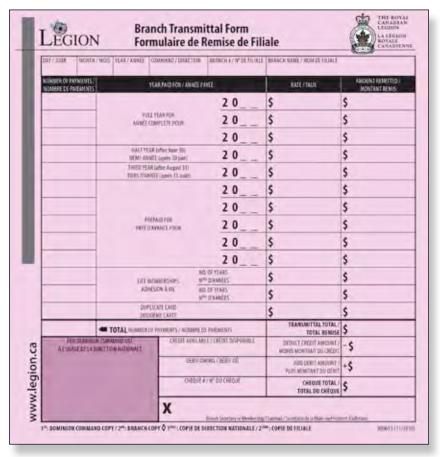


FIGURE 3-1 — BRANCH TRANSMITTAL FORM

### FORMS TO USE

- 301. BRANCH TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

### PROCESS

302. BRANCH TRANSMITTAL FORM (See Figure 3-1)

Complete this form when submitting renewal cards and Member Registration Forms to Dominion Command. It must accompany all cheques being submitted to Dominion Command.

- a. Complete all applicable sections which include date and command and branch.
- b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the per capita tax rate for that year. Note: If submitting half year or one third year payments calculate using ½ or 1/3 of the full year's per capita tax rate.
- c. Indicate the number of duplicate cards being requested. Cost for a duplicate card is \$3.00. To calculate the total, multiply the number of duplicate cards requested by \$3.00.
- d. Indicate the number of life memberships being submitted and the no. of years being paid. Indicate the rate (current year's per capita tax rate). To calculate the total, multiply the rate by the number of years being paid (this is determined by the member's age according to schedule in Section 205.a. of the General By-Laws).
- e. Complete the total number of payments being submitted and the total of the transmittal.
- f. If using suspense account credits or paying debits enter the amount on the appropriate line. Add or subtract this amount from the "Transmittal Total" to determine the amount to be submitted. Enter this figure on the "Cheque Total" line. Your cheque must agree with this figure.

- g. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.
- h. Ensure your cheque is made payable to Dominion Command, correctly dated, that the written amount agrees with the numerical figure, and that the cheque has two signatures when required.
- i. Double check the number of items, the rate and your calculations to ensure that the correct per capita tax is remitted. This will help minimize errors and reduce extra work for both the branch and Dominion Command.
- j. Staple any Member Data Change Forms to the front of the member's renewal card or Member Registration Form and place these at the front of your submission.
- k. Submit no more than 200 items per transmittal. Dominion Command uses a batch system to process submissions and it is difficult to process those with more than 200 items. Wrap the transmittal around the submission and place the cheque on top. The package should be properly secured before putting it in the envelope.
- I. Submit per capita tax to Dominion Command using the preaddressed membership envelopes. Ensure correct postage is affixed. The size of the envelopes comply with Canada Post guidelines; however, additional postage may be required dependent on weight and thickness.
- m. Remember each transmittal form must be accompanied by a separate cheque. Per capita tax submissions should be sent to Dominion Command at least weekly.

## HOW TO PROCESS A NEW MEMBER

#### DESCRIPTION

Anyone applying for membership must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws. Once the application has been approved by all the appropriate parties, this and any other required eligibility documentation is to be maintained by the branch in the member's file. Do not send to Dominion Command. Branches must use a Member Registration Form to register a new member at Dominion Command.

#### FORMS TO USE

- 401. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)
- 402. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 403. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

## PROCESS

#### 404. MEMBERSHIP APPLICATION FORM

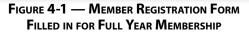
a. When a person applies for membership, ensure the appropriate areas of the application form are completed (see Chapter 2) and all eligibility documentation is attached. You must ensure that proof of citizenship has been established and the Privacy Statement has been completed. The application must be proposed and seconded by voting members of the branch.

- b. The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.
- c. When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.
- d. Add the member's name to the branch register and create a file for the member. Fill out a Master Card for the member's file and record the date of payment. When the membership card is received record the membership number that has been issued on the member's file.
- e. All new members must be initiated in accordance with The General By-Laws and the Ritual and Insignia Manual.
- f. To submit a new membership to Dominion Command complete a Member Registration Form.
- 405. MEMBER REGISTRATION FORM (See Figure 4-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included. The Date field should reflect the date the member completed the application form. Please record the date of application on the Member Registration Form.
  - d. Complete Section D by marking the year being paid and "New– Full Year". After July 1<sup>st</sup> new members may pay half year per capita tax. To indicate mark "New – Half Year". After September 1<sup>st</sup> new members may pay one third per capita tax. To indicate mark "New – Third Year".

**Note:** If the applicant does not pay dues for the current year but pre-pays for the following year only, the applicant does not become a member until January 1<sup>st</sup> of the year paid. These memberships must not be submitted to Dominion Command prior to November 1<sup>st</sup>.

e. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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- 406. BRANCH TRANSMITTAL FORM (See Figure 4-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.

b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate. If submitting per capita tax for arrear year, use the rate applicable for the year submitted.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

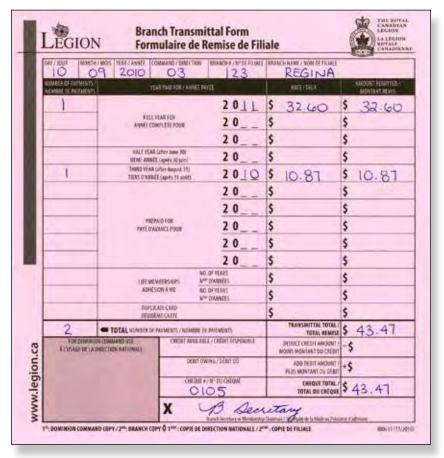


FIGURE 4-2 — BRANCH TRANSMITTAL FORM

## HOW TO PROCESS A RENEWAL

#### DESCRIPTION

Two-Part Renewal/Membership Cards for the coming year are produced by Dominion Command each July for all members in the branch who have paid membership dues for the current year at that time. These cards are produced once a year and cannot be reissued or replaced. The renewal cards for the new processing year must not be submitted to Dominion Command prior to September 1<sup>st</sup>. You will not receive a two-part card for new or renewing members submitted after these cards are produced. When renewing these members for the new processing year a Member Registration Form must be used and a membership card will be produced and sent to the branch once the payment is processed in our office.

#### FORMS TO USE

501. RENEWAL CARD (See Figure 1-7) (bar code portion)

**Note:** If the renewal card is not available then you must complete a MRF – do not submit both.

502. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)

a. White - is the Dominion Command copy

b. Green - is the Branch copy

- 503. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

### PROCESS

- 504. RENEWAL CARD (See Figure 5-1)
  - a. When membership dues are paid a receipt must be issued to the member.

#### The Royal Canadian Legion

- b. The two part cards are issued in alphabetical sequence for easy reference. Remove the membership card portion, sign and give the card to the member. Membership cards must not be given to members before dues are paid.
- c. Record the date of payment on the member's Master Card and other branch records.
- d. The renewal card portion (Figure 5-1) is to be sent with the per capita tax to Dominion Command

When submitting per capita tax a cheque must be accompanied by the above renewal membership card (Figure 5-1) as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

**Note:** If the two-part renewal/membership card is not available then you must complete a Member Registration Form



FIGURE 5-1 — RENEWAL CARD (BAR CODE PORTION)

- 505. MEMBER REGISTRATION FORM (See Figure 5-2)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.

- c. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included.
- d. Complete Section D by marking the year being paid and "New– Full Year". After July 1<sup>st</sup> new members may pay half year per capita tax. To indicate mark "New – Half Year". After September 1<sup>st</sup> new members may pay one third per capita tax. To indicate mark "New – Third Year".
- e. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 5-2 — MEMBER REGISTRATION FORM

- 506. BRANCH TRANSMITTAL FORM (See Figure 5-3) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

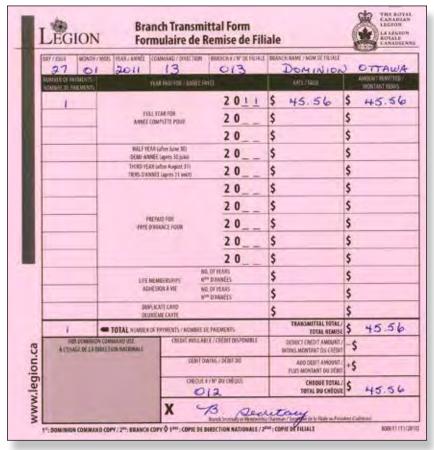


FIGURE 5-3 — BRANCH TRANSMITTAL FORM

## HOW TO PROCESS A REINSTATEMENT

#### DESCRIPTION

Any payment of per capita tax that results in a break in service is considered a reinstatement. For example: If a member paid for 2009, did not pay for 2010 and paid for 2011, this is considered a reinstatement. (Note: A member may still renew their membership for the current and previous two years). A member may apply to any branch for reinstatement regardless of the length of time the membership has lapsed. Reinstatements are not retroactive and all previous years of service are disqualified. All reinstating members must complete a Membership Application Form which must be processed in accordance with the procedures set out in the General By-Laws. Once the application has been approved by all appropriate parties, this and any other eligibility documentation is to be maintained by the branch in the member's file. A Member Registration Form must be used to submit a reinstating member to Dominion Command.

#### FORMS TO USE

- 601. MEMBERSHIP APPLICATION FORM (See Figure 1-5) (White two sided form) (Stock # 800293)
- 602. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy

b. Green - is the Branch copy

- 603. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

#### PROCESS

- 604. MEMBERSHIP APPLICATION FORM
  - a. When a person applies for reinstatement, ensure the appropriate areas of the application form are completed and all eligibility documentation is attached. You must ensure

that proof of citizenship has been established and the Privacy Statement has been completed. The application must be proposed and seconded by the voting members of the branch.

- b. The application and eligibility documents must be reviewed by the Branch Membership Committee and presented at a Branch General Meeting for approval or otherwise.
- c. When membership dues are received a receipt must be issued which will serve as proof of membership until a membership card is received.
- d. Fill out a Master Card for the member's file and record the date of payment. Add the member's name to the branch register and create a file for the member if he his new to the branch or if a file does not already exist. If the member's number is known or when the membership card is received add this information to the records.
- e. Reinstating members do not have to be re-initiated.
- f. To submit a new membership to Dominion Command complete a Member Registration Form.
- 605. MEMBER REGISTRATION FORM (See Figure 6-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. A Member Registration Form must be used to submit a reinstatement to Dominion Command
  - d. Complete the Member Information Section of the Member Registration Form. Ensure that the citizenship and Privacy Statement are completed and the complete mailing address and postal code is included. Include existing membership number if available. The date on the Member Registration Form should reflect the date that the member completed the application form.
  - e. Complete Section D by marking the year being paid and the box indicating "REINSTATED". Note: Reinstated members are not entitled to pay 1/2 year or 1/3 year per capita tax.

- f. Retain the Membership Application Form and all eligibility documentation in the member's file. Submit the Member Registration Form (white copy) with a Branch Transmittal Form (pink) and the appropriate per capita tax. If reinstating member of the current year and renewing for the upcoming year, this should be done on the same Member Registration Form do not submit more than one form.
- g. When submitting per capita tax, a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 6-1 — MEMBER REGISTRATION FORM

- 606. BRANCH TRANSMITTAL FORM (See Figure 6-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.

**Note:** If submitting half year or one third year payments calculate using 1/2 or 1/3 of the full year's per capita tax rate.

- c. Complete the total number of payments being submitted and the total of the transmittal.
- d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

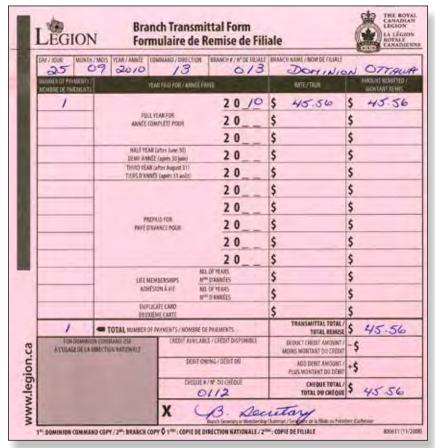


FIGURE 6-2 — BRANCH TRANSMITTAL FORM

## HOW TO PROCESS A LIFE MEMBERSHIP

#### DESCRIPTION

A branch may nominate any Ordinary, Associate or Affiliate Voting member for a Life Membership Award for outstanding service in accordance with the General By-Laws and the Honours and Awards Manual. The membership period required is ten (10) consecutive years immediately prior to the date of nomination.

#### FORMS TO USE

- 701. APPLICATION FOR LIFE MEMBERSHIP FORM (See Figure 1-4) (White single sided form) (Stock # 800282)
- 702. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)

a. White - is the Dominion Command copy

b. Green - is the Branch copy

- 703. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

### PROCESS

- 704. LIFE APPLICATION FORM (See Figure 7-1)
  - a. Complete the appropriate application form and citation following the procedures set out in the Honours and Awards Manual. These must be approved by your Provincial Honours and Awards Committee prior to submission to Dominion Command.
  - b. The Life Application form must be presented and approved at a branch general meeting.

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Signature:	Zone Commander / Commandant du Zone	nature: District Commander / Commandant d	u district

FIGURE 7-1 — APPLICATION FOR LIFE MEMBERSHIP

705. MEMBER REGISTRATION FORM (See Figure 7-2)

- a. After the Life Application Form had been approved by the general meeting of the branch, complete the Member Information Section of the Member Registration Form.
- b. Complete Section E indicating the number of years being paid according to the member's age and as indicated on the Life Application Form and Section 205.a. of the General By-Laws.

This is calculated by multiplying the number of years being paid by the current year's rate.

- c. Provincial Command approval is required for all Life applications prior to submission to Dominion Command. Approval must be shown on the document forwarded to Dominion Command with the per capita tax.
- d. The approved Member Registration Form or copy of original Application Form is to be sent to Dominion Command. Do not send original application form this should be kept on the member's file at the branch.
- e. Cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 7-2 — MEMBER REGISTRATION FORM

- 706. BRANCH TRANSMITTAL FORM (See Figure 7-3) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of years by the current year's per capita tax rate.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

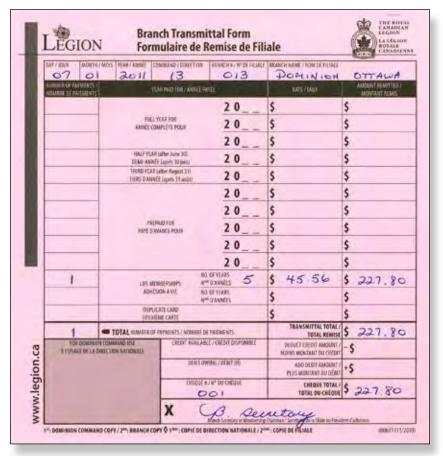


FIGURE 7-3 — BRANCH TRANSMITTAL FORM

# **CHAPTER 8**

# HOW TO PROCESS A PREPAYMENT

# DESCRIPTION

A member may prepay up to five years per capita tax which should be calculated at the current year's rate.

# FORMS TO USE

- 801. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 802. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

# PROCESS

- 803. MEMBER REGISTRATION FORM (See Figure 8-1)
  - a. The member must be given a receipt for the dues paid.
  - b. Record payment on the member's master card file and any other applicable branch records.
  - c. Complete the Member Information Section of the Member Registration Form.
  - d. Complete Section D indicating if member is renewing for the current year.
  - e. Complete Section E indicating the years being pre-paid.

**Note:** per capita tax for the current year must be paid before a pre-payment of future years can be processed.

f. When submitting per capita tax a cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 8-1 — MEMBER REGISTRATION FORM

- 804. BRANCH TRANSMITTAL FORM (See Figure 8-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payments being submitted for corresponding year. To calculate the total, multiply the number of payments by the current year's per capita tax rate.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 8-2 — BRANCH TRANSMITTAL FORM

# **CHAPTER 9**

# HOW TO REQUEST A DUPLICATE CARD

# DESCRIPTION

If a member's card has been lost, stolen or destroyed a duplicate card can be ordered at a cost of \$3.00. A duplicate card cannot be issued unless per capita tax for the year requested has been paid.

# FORMS TO USE

- 901. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy
- 902. TRANSMITTAL FORM (See Figure 1-3) (Pink two part form) (Stock # 800611)
  - a. 1<sup>st</sup> copy is the Dominion Command copy
  - b. 2<sup>nd</sup> copy is the Branch copy

# PROCESS

- 903. MEMBER REGISTRATION FORM (See Figure 9-1)
  - a. Complete the Member Information Section of the Member Registration Form.
  - b. Complete Section D by checking the box for a duplicate card. Indicate the year that is required.
  - c. Cheque must be accompanied by the above forms as well as a Branch Transmittal Form. Cheque must be made payable to Dominion Command.

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FIGURE 9-1 — MEMBER REGISTRATION FORM

- 904. BRANCH TRANSMITTAL FORM (See Figure 9-2). Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of duplicate cards being requested. Cost for a duplicate card is \$3.00. To calculate the total, multiply the number of duplicate cards requested by \$3.00.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 9-2 — BRANCH TRANSMITTAL FORM

# **CHAPTER 10**

# **HOW TO PROCESS A TRANSFER**

# DESCRIPTION

Members may apply to any branch to transfer their membership. The branch that the member wishes to transfer to must initiate the transfer. A transfer cannot be initiated by the old branch. Transfers must be approved at a branch general meeting before submitting to Dominion Command for processing.

## FORMS TO USE

1001. TRANSFER APPLICATION FORM (See Figure 1-6) (White two sided form) (Stock # 800792)

- 1002. MEMBER DATA CHANGE FORM (See Figure 1-2) (Yellow two part form) (Stock # 800669)
  - a. Yellow is the Dominion Command copy
  - b. Blue is the Branch copy
- 1003. MEMBER REGISTRATION FORM (See Figure 1-1) (MRF - White two part form) (Stock # 800613)
  - a. White is the Dominion Command copy
  - b. Green is the Branch copy

1004.TRANSMITTAL FORM (See Figure 1-3)

(Pink two part form) (Stock # 800611)

- a. 1<sup>st</sup> copy is the Dominion Command copy
- b. 2<sup>nd</sup> copy is the Branch copy

# PROCESS

1005. TRANSFER APPLICATION FORM (See Figures 10-1 and 10-2).

- a. Members who wish to transfer must complete a Transfer Application Form at the branch they wish to transfer to. They may only apply to transfer if they are in good standing or if lapsed for not more than the current or immediate preceding two years and the arrear years are paid at the time of transfer.
- b. If the member does not have a Membership Card to prove current status, the branch should contact the previous branch or Dominion Command for confirmation.

- c. The branch membership committee should review the application form and contact the previous branch to ensure that the member is in good standing and obtain any information that may be pertinent.
- d. The application must be presented to a general meeting of the branch for approval or otherwise.

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	r cannot be processed	unless Per l	apite Tax for t	he current yea	MINION COMMA or has been paid or is a Member Registrat	being paid at time	

#### FIGURE 10-1 — APPLICATION FOR TRANSFER FORM (FRONT)

- e. If paying dues at the time of the transfer, a receipt should be given as proof of membership until a membership card is received.
- f. The member's file will not be forwarded from the old branch until the transfer has been processed by Dominion Command; therefore, you should record the receipt number and date of payment in a temporary file until the member's file is received. At this time the payment should be recorded on the member's master card.

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WHAT Service Work—Welfare Minarch Scolal Activities Committee Work Youth Activities	BRANCH ACTIVIT	IES INTEREST YOU MOST? Remembrance—Poppy Community Activities Sports Program Organization - Administration	
Service Work—Welfare Annech Social Activities Committee Work Youth Activities	BRANCH ACTIVIT	IES INTEREST YOU MOST? Remembrance—Poppy Community Activities Sports Program Organization - Administration	

FIGURE 10-2 — APPLICATION FOR TRANSFER FORM (BACK)

#### 1006.MEMBER DATA CHANGE FORM (See Figure 10-3)

- a. Complete the Member Information Section "A" including member number, command/branch number, name and address, etc;
- b. Complete Section "B" indicating new command and new branch;
- c. Complete any other applicable areas in Section "B" such as the address if the member's address has also changed;
- d. A transfer cannot be processed if the current year's per capita tax has not been or is not being submitted to Dominion Command at the time of the transfer – see Member Registration Form (below) if submitting per capita tax.

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FIGURE 10-3 — MEMBER DATA CHANGE FORM

#### 1007. MEMBER REGISTRATION FORM (See Figure 10-4)

- a. If the current year's per capita tax is not paid then you must include per capita tax when submitting the Member Data Change Form.
- b. Complete the Member Information Section of the Member Registration Form and attach it to the Membership Data Change Form.
- c. Complete Section D indicating the year for which the member is renewing. If in arrears for more than the current year indicate all years being paid. Note: that a member can renew for only the current and/or two immediate preceding years.
- d. When submitting per capita tax, a cheque made payable to Dominion Command must accompany the above forms as well as a Branch Transmittal Form.

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FIGURE 10-4 — MEMBER REGISTRATION FORM

- 1008.BRANCH TRANSMITTAL FORM (See Figure 10-5) Must accompany all cheques being submitted to Dominion Command.
  - a. Complete all applicable sections which include date and command and branch.
  - b. Indicate the number of payment being submitted. To calculate the total, multiply the per capita tax rate by the number of payments.
  - c. Complete the total number of payments being submitted and the total of the transmittal.
  - d. Complete cheque information by providing the cheque number and the total amount of the cheque being submitted.

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FIGURE 10-5 — BRANCH TRANSMITTAL FORM

# **CHAPTER 11**

# HOW TO PROCESS A DECEASED MEMBER

# DESCRIPTION

Dominion Command must be advised of the death of any member regardless of membership category. Legion Magazine publishes a removable Last Post Section in the magazine twice a year in the spring and fall and posts the entries in a searchable database on their website <u>www.legionmagazine.com</u>. The Last Post is reserved for Ordinary members of The RCL at the time of death; RCL Life members who were previously Ordinary members and Canadian War Veterans. The branch should complete and submit a Last Post Death Notice for members who have had military service in order to publish an announcement in Legion Magazine. Only those received within a year of the date of death are published in the magazine.

# FORMS TO USE

1101. MEMBER DATA CHANGE FORM (See Figure 1-2) (Yellow two part form) (Stock # 800669)

- a. Yellow is the Dominion Command copy
- b. Blue is the Branch copy
- 1102. LAST POST DEATH NOTICE (See Figure 1-8) (Blue single sided form) (Stock # 800430)

# PROCESS

1103. MEMBER DATA CHANGE FORM (See Figure 11-1)

- a. Complete a Member Data Change Form for all categories of membership;
- b. Complete the Member Information Section "A", including member #, command/branch, name and address;
- c. Complete Section "B" NEW INFORMATION Under the section for Legion Magazine at the bottom of the form, mark the box DECEASED to identify any deceased member.

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FIGURE 11-1 — MEMBER DATA CHANGE FORM

#### 1104. LAST POST DEATH NOTICE (if applicable) (See Figure 11-2)

- a. An announcement will be published in the Legion Magazine for any member who has had military service and notification for the death has reached Legion Magazine within one year of the date of death. The onus is on the branches to submit these notices promptly. Late notices will only be entered in the Last Post database on the Legion Magazine website. Notices without a date of death will not be published.
- b. Complete appropriate section on the form providing all known information regarding the deceased.
- c. Provide membership information including Command/ Branch, membership number and the last year membership dues were paid.
- d. If the deceased was a Legion member and the widow(er) is not and wishes to receive Legion magazine for the duration of the calendar year, please complete the section "WIDOW(ER) INFORMATION"; otherwise the deceased's subscription will be cancelled.

If the deceased was a Legion member and the widow(er) is also a Legion member but is currently not receiving the magazine, please complete all areas under this section in order to reactivate the widow(er)'s subscription.

e. The Last Post Notice must be mailed to:

#### Last Post, Legion Magazine

86 Aird Place Kanata, ON K2L 0A1

me posts the entries in a search	able database on the Web	n in print twice a year, in the sp site www.legionmagazine.com.	any and rate and a weat
ast Post is reserved for these () RCL life members who were crean War, Guff War) who were	e previously ordinary me	mbers; and 3) Canadian war	Legion at time of death; reterans (WW L WW II,
The onus is on branches to sub We only publish in the print mu ate notices will only be entered We do not publish notices that lac	agazine those notices n in the Last Post databas	ceived at our Ottawa office w	thin one way of death.
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FIGURE 11-2 — LAST POST DEATH NOTICE

# CHAPTER 12

# HOW TO PROCESS MEMBER INFORMATION CHANGES

## DESCRIPTION

Any changes to a member's information must be submitted to Dominion Command by completing the appropriate sections on a Member Data Change Form. This form is used to provide Dominion Command with new or changed information pertaining to an existing member. A new Membership Card will be issued if the change affects the information reflected on the Membership Card, (ie. transfers, name changes, category changes) providing per capita tax has been paid for the current year. If not paid, a new card will be issued at the time the per capita tax is processed.

# FORMS TO USE

1201. MEMBER DATA CHANGE FORM (See Figure 1-2).

(Yellow two part form) (Stock # 800669)

a. Yellow - is the Dominion Command copy

b. Blue - is the Branch copy

# PROCESS

1103. MEMBER DATA CHANGE FORM Complete the Member Information Section providing all applicable information including member number, command/branch number, address, category, citizenship and privacy information. For any changes, complete the appropriate area under the section "New Information."

# a. **Privacy Statement:** (See Figure 12-1) in order to change the privacy information complete the Privacy Statement.

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## FIGURE 12-1 — MEMBER DATA CHANGE FORM—PRIVACY STATEMENT

b. **Transfer:** (See Figure 12-2) please refer to "How to Process a Transfer".

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FIGURE 12-2 — MEMBER DATA CHANGE FORM—TRANSFER

c. **Category Change:** (See Figure 12-3) When a membership category changes, the current membership category should appear in the information section and the new category should be entered under the section titled "NEW INFORMATION". You must also complete the section "REASON FOR CHANGE", providing a reason for the category change. For appropriate reason please refer to the eligibility requirements for the new category indicated.

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FIGURE 12-3 — MEMBER DATA CHANGE FORM—CATEGORY CHANGE

d. **Name Change:** (See Figure 12-4) When a change to a member's name is required, the old name should be shown in the Member Information Section and the new name should appear under the section titled "NEW INFORMATION". Member numbers can be easily confused for members with similar names; therefore, the reason for the name change is required and you must also complete the section "REASON FOR CHANGE", providing a reason for the name change. The operator can then more easily verify if the name and number are consistent. If a reason is not given and there appears to be no logical reason for the name change, the Member Data Change Form will be returned to the branch. Please ensure that you provide the full first name for the individual.

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FIGURE 12-4 — MEMBER DATA CHANGE FORM—NAME CHANGE

e. **Legion Magazine:** (See Figure 12-5) Check the appropriate box to advise if the magazine is required and the language of choice or if the magazine is no longer required.

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FIGURE 12-5 — MEMBER DATA CHANGE FORM—LEGION MAGAZINE

f. **Deceased Member:** (See Figure 12-6) Dominion Command must be advised of the death of any member regardless of membership category. If the member has had military service and an announcement is to be published in the Legion Magazine, the branch should also submit a Last Post Death Notice to Legion Magazine.

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FIGURE 12-6 — MEMBER DATA CHANGE FORM—DECEASED MEMBER

g. Year of Birth & Gender: (See Figure 12-7) Dominion Command maintains membership statistics based on age and gender. Although this information should be provided when a new member is submitted, this is not always done; therefore, Dominion Command may periodically ask branches to provide this information. It is recommended that whenever a Member Data Change Form or a Member Registration Form is being submitted to Dominion Command that this information be included.

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FIGURE 12-7 — MEMBER DATA CHANGE FORM—YEAR OF BIRTH AND GENDER

h. Years of Continuous Service: (See Figure 12-8) Dominion Command does not maintain individual member files and did not always maintain years of continuous service on their records. Prior to 1987 branches were requested to submit this information; however, not all branches did. Therefore, some records may be inaccurate. If this information is incorrect in our records the branch must advise us accordingly. Branches must ensure that if a change to years of service is submitted that their branch records indicate that the member has had continuous service without interruption. We do know that any per capita tax payments processed since 1987 have been recorded correctly to the member's records.

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FIGURE 12-8 — MEMBER DATA CHANGE FORM—YEARS OF CONTINUOUS SERVICE

i. **Military Service:** (See Figure 12-9) Military service information is used by Dominion Command for statistical purposes and applied only to members who have served in the military, (ie Ordinary members and Life members who were formerly Ordinary members). Under the military service section indicate the member's service number and the theatre of war and type of service by marking the appropriate box.

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FIGURE 12-9 — MEMBER DATA CHANGE FORM—MILITARY SERVICE

j. **Change of Address:** (See Figure 12-10) It is important that Dominion Command has the correct mailing address for all members. Enter the member's previous address under Part "A" (PRE-VIOUS MEMBER INFORMATION) and the member's new address in Part "B" (NEW INFORMATION). The address provided must be the mailing address which is not always the same as the civic address. If a member has a street address but has mail delivered to a PO Box #, then it is the PO Box # that we require. If the member lives on a rural route and also has a street address, we need both the RR# and the street address. It is the mailing address that we require and you must always include the postal code.

**Note:** Labels for the magazine are produced 6-8 weeks in advance of the delivery date of each issue; therefore, address changes may not become effective immediately.

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FIGURE 12-10 — MEMBER DATA CHANGE FORM—CHANGE OF ADDRESS

# CHAPTER 13 REPORTS

## **BRANCH TRANSMITTAL REPORT**

#### 1301. DESCRIPTION

a. Each per capita tax submission processed at Dominion Command is assigned a Transmittal Number. This number is indicated on the header (top) of the Branch Transmittal Report which is sent to the branch for each per capita tax submission processed. The report is a summary of the items processed and shows the details of the cheque the branch sent with the submission and any debits or credits that may have resulted. The body of the report lists the member numbers and names and other details of the items processed.

#### 1302. PROCESS

- a. Header—The top section shows the date the submission was processed, the Command and Branch numbers and the transmittal number assigned by Dominion Command. It also shows your cheque number and amount, the amount of the items processed and any suspense amount (shortage or overage). Check the "Suspense" amount which will be zero if the transmittal balanced. If this is other than zero, it means that the payment did not correspond with the items processed and you should refer to the Transmittal Summary. A Per Capita Tax Suspense Statement showing the balance in the suspense account, will be attached to any "out of balance" Transmittal Report.
- b. Body—The main section of the Transmittal Report lists all items processed. Check this section carefully to ensure that all the items submitted were processed. The member numbers and names are listed as well as the year processed. The type of transaction is indicated with an "R" for renewals, "S" for reinstatements and "N" for new registrations. The membership year being paid is also shown with an "F", "H" or "T", which indicates whether the payment was processed at the full year ("F"), half year ("H") or 1/3 year ("T") per capita tax rate. The membership category is indicated under "Mbr Type" and the code under the "Card Code" column indicates if a Membership Card is included or the reason why one is not, as detailed in the "Card Summary" section.

- c. Card Summary—This section summarizes the number of items processed, the reason and number of Membership Cards not issued and the number of Membership Cards issued with the Transmittal Report.
- d. Check the cards and report carefully and advise Dominion Command of any discrepancies immediately. File the report in your branch records for future reference.

BC15056			RANCH TRANSMITTAL IE ROYAL CANADIAN			March	04, 2011
BR/ TR/	VIMAND ANCH ANSMITTAL# DCESSED ON	01 01-094 BC15056 01-Oct-2010		CHECK# CHECK AMOU TOTAL SUSPENSE AN	INT	2692 529.31 449.84 79.47	
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7530166	GOODMAN, AF	RTHUR E	2011	R	F	AS	1
4534431	GREGG, PAT O	3	2011	R	F	AS	1
6702454	HOPKINS, ROY	( M	2011	R	F	OR	1
7897269	HORN, DARCE		2010	R	F	AV	5
7902320	HORN, MARGA		2010	R	F	AV	5
4534397	INSCHO, DORO		2011	R	F	AS	3
10083168	IVES, EMILY E		2010	R	F	AS	1
10083168	IVES, EMILY E		2011	R	F	AS	5
10058419	JAWANDA, BA	LDEV SINGH	2010	R	F	AS	1
8742165	MILLS, CAROL		2010	R	F	AS	1
4861035	PUMPHREY, W		2011	R	F	OR	1
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							18

**Note:** Per capita tax is not processed unless a Member Registration Form or Renewal Card is included with the submission. Membership Cards for the previous year are not issued after January 31<sup>st</sup>.

# TRANSMITTAL SUMMARY / SUSPENSE STATEMENT

## 1303. DESCRIPTION

a. If a transmittal is out of balance, the computer printed Branch Transmittal Report will show a (-)debit or credit amount in the suspense area. The out-of-balance amount goes into your branch suspense account and a Transmittal Summary will be forwarded with the Branch Transmittal Report. The summary lists any out-of-balance amount on the specific transmittal and identifies items which may have caused the debit or credit amount. A Suspense Statement is attached to the Transmittal Summary indicating the current balance in the suspense account.

1304. PROCESS

- a. Header—The top section shows the transmittal number assigned by Dominion Command, the date the submission was processed and the branch number. It also shows the suspense amount created on this particular transmittal. If the Suspense Amount has a (-) before the total this indicates a debit (shortage). If the Suspense Total does not indicate (-) before the total – then this indicates a credit (overage).
- b. Body—The main section of the Transmittal Summary identifies the reason for the suspense amount. There could be one or more reasons why the submission did not balance. For example:
  - i. Returned items If items could not be processed and were returned to the branch, it will indicate the number of items and the rate of per capita tax paid. Any returned items will be included with a letter giving details why the items were returned.
  - ii. Number of members paid for If the number of items processed is different from the number of items paid for, the transmittal will be out of balance. Check the Branch Transmittal Report carefully to ensure that all the members

you intended to pay for are listed. A missing name would indicate that we did not receive the transaction with your submission and you would end up with a credit. Conversely, if you included more items in the submission than you paid for you would end up with a debit.

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2010	6	Full	26.49	158.94	6	0	0.00	) 158.94	0.00
2011	11	Full	26.49	291.39	13	2	52.98	3 344.37 1 ALREADY PR	79.47
			a Goog Ballona Ta Leo					Subtotal	79.4
								Adjustments	0.00
								Suspense Total (-) Debit	79.4
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						Bala	ance as of:	01-October-2010	\$48.41
		BC15	056		06-Oc	t-2010			79.47
								Subtotal	79.47
								Debit / (+) Credit	127.88

- iii. Applied to Suspense Account If you included a debit note or credit note from a previous transaction, it would create an out of balance situation on the current submission. The debit or credit amount will be applied to the suspense account and will appear in the "adjustments" area.
- iv. Adjustments This section identifies other reasons why the submission may be out of balance.

- v. Suspense Total—this identifies the amount owing to Dominion Command (-) Debit or the Credit due to the branch on this particular transmittal.
- vi. Check the Suspense Statement—You should refer to the Suspense Statement that is attached to any "out of balance" Transmittal Report for the current balance of the account. The Statement lists the balance at the beginning of the current month and details of any suspense amounts incurred during the month. Payment for any amount owing (debit) should be forwarded by a separate cheque, or if you will be sending in another submission shortly you may include this amount. If you have a credit, you may apply it to your next submission.

**Note:** Each Transmittal Summary pertains only to the transmittal report in question. Please refer to the Suspense Statement for the balance in your suspense account.

# TRANSFER/REINSTATEMENT REPORTS

#### 1305. DESCRIPTION

a. Transfer/Reinstatement Reports are produced at the end of each month and sent to all branches who have had members transferring in or out that month, including members who have reinstated in a new branch. The date on the top of the page indicates when the report was produced and any transfers processed after that date will be included on the next report. Members are listed by member number and name and shows the other branch number and address. As indicated on the report, branches with members transferring out, must forward their files to the new branches immediately.

#### 1306.PROCESS

- a. Header—The top section indicates if the report is for members transferred to or from the branch, the branch name and the date.
- b. Body—The main section of the report lists all members who have transferred in or out of the branch. Check the name and

member numbers carefully to ensure that all members listed are correct.

c. For members transferring out of your branch, forward the members' files, including Master Cards, to the new branch at the address provided. It is very important that this be done promptly.

## **BRANCH MEMBERSHIP REGISTER**

#### 1307. DESCRIPTION

a. The Branch Membership Register indicates how Dominion Command records stand for your members. Listed will be all members whose per capita tax has been paid for the current year and all members paid for the previous year, but whose per capita tax has not been received for the current year. These members are not in good standing and will not receive the Legion Magazine. The date on the top of the pages indicate the date the register was produced. Any transactions received after this date would not be reflected. Members are listed in alphabetical order, with each category listed separately in the following sequence: Life, Ordinary, Associate, Affiliate Voting, Affiliate Non-Voting and Meritorious Life. The Branch Membership Register is for information only and cannot be used for statistical purposes. It has no bearing on the final year-end statistics. Statistical information should be obtained from your Zone, District or Provincial Command. A Branch Membership Register is sent to each branch in February and July of each year. Additional requests for a Branch Membership Register will result in a processing charge.

#### 1308. PROCESS

- a. Member Number and Name—Check each membership category to ensure all members are listed correctly. Deceased members are not included on the register so if the name of a deceased member is shown you must notify Dominion Command immediately.
- b. Address—Dominion Command must have a complete and accurate mailing address for every member in order to send out the Legion Magazine. If an address is incorrect or the member

has moved, the magazine will be returned by Canada Post, or if an incomplete address has been submitted the magazine cannot be mailed. Suspension of the magazine is indicated by a "P" or an "I" in the mail status (MS) column and an "M" and date of suspension in the street address column. The magazine will be suspended until new or correct addresses are received. Check members' addresses carefully and submit new addresses immediately by completing a Member Data Change Form.

- c. Language Code—An "F" in the language code (LC) column indicates the member wishes to receive the French insert in the Legion Magazine.
- d. Mail Status—This column will advise you as to the status regarding the delivery of the Legion Magazine. The following codes can be found in the mail status column. Note: Codes N, P, I or C in this column indicates that delivery of the magazine has been suspended. See below for detailed explanation.
  - i. **A** this code indicates that the member will receive the magazine as long as PCT for the current year is paid.
  - ii. N this code will suspend delivery of the magazine. It indicates that the member does not wish to receive the Legion Magazine. This is usually because there are two members in the household. If this situation changes and the member wishes to receive the magazine you must notify Dominion Command by completing a Member Data Change Form.
  - iii. P this code will suspend delivery of the magazine. This indicates that the magazine was returned to our office by Canada Post as undeliverable. A new address is required to reinstate delivery; therefore, complete a Member Data Change Form and forward to Dominion Command.
  - iv. I this code will suspend delivery of the magazine. This indicates that the address is missing a key piece of information such as an apartment number. As delivery of the magazine cannot be completed without the information please verify that all elements of the address have been provided by completing a Member Data Change Form and forwarding to Dominion Command.

- v. **C** this code will suspend delivery of the magazine. This code would indicate that the magazine was previously suspended for non-payment of dues. This code is also used if a former member indicates that he does not wish to receive any further correspondence (such as a renewal notice) from Dominion Command. Please notify us immediately if this code appears in the column and member has paid for the current year.
- e. Years of Continuous Service—The years of service (YR SV) column indicates the total years of continuous service the member has as of the last year paid. Dominion Command does not maintain individual records; therefore, we cannot confirm years of service prior to 1987. This information should be obtained from branch records.
- f. Last Year Paid—Check the year paid (Years Paid) column which indicates the last five years payment history for each member. Check that the per capita tax has been submitted for all members who have paid dues to the branch for the current year. If Dominion Command has not received the per capita tax, the last year paid will be the previous year. Payment must be submitted immediately for all members who have paid dues to the branch, but whose per capita tax has not been submitted to Dominion Command.
- g. Cancel Date—This indicates the date the magazine was returned to our office by Canada Post as undeliverable. Se Mail Status (MS) column. This should have a "P" or "I" indicating the magazine was canceled pending receipt of a new address.
- h. Category Totals—the totals indicate the number of members paid for the current year and the number of members paid for the previous year.
- i. February Branch Membership Register—This lists all members whose per capita tax for the current year was received by February 6<sup>th</sup>. It also lists those members whose per capita tax was not received by February 6<sup>th</sup>; these members are no longer in good standing and will not receive the Legion Magazine. The name of a member appears in the branch register that is deceased, then he has not been recorded as deceased in the membership database at Dominion Command and you should

notify our office immediately. This applies to all categories of membership.

**Note:** Check the February Branch Membership Register carefully. If the information indicates that per capita tax or a notification of death has not be submitted, you must do so immediately.

j. July Branch Membership Register—Two-part Renewal/ Membership Cards for the following year are only produced for members whose per capita tax has been paid for the current year. Production of the two-part cards begins in July; therefore, any per capita tax payment received for the current year after June will mean that you will not receive a two-part card for these members. You must, therefore, submit the following year's payment on a Member Registration Form.

**Note:** Check the July Branch Membership Register carefully to determine who you have and have not received two-part Renewal/Membership Cards for.

**Note:** Deceased members are not shown on the Branch Membership Register; therefore, if you know someone is deceased and the name is listed you must notify Dominion Command immediately.

#### **BRANCH NON-RENEWAL LIST**

1309. DESCRIPTION

a. Non-Renewal Lists are produced on a request basis only. The report indicates all members who have not renewed their membership for the current year. It also indicates members who are in arrears for the previous year. Branches are encouraged to contact these members and remind them to bring their membership dues up to date. Production of these lists will result in a processing charge.

#### 1310. PROCESS

- a. If there are any members listed for whom you have received branch dues for the current year, you must submit the per capita tax to Dominion Command immediately. Please see section "Important Dates" to ensure that you do not miss a deadline date. Remember, these members no longer receive the Legion Magazine. Please see Section 1403 for important dates.
- b. If there are any deceased members listed, you must forward a Member Data Change Form to Dominion Command immediately so we can update our records. Please see section "Important Dates" to ensure that you do not miss a deadline date.
- c. Check for any "M" and date codes in the Street Address column and the Cancel Date column. The branch must follow-up with these members regarding their renewal. A change of address should be forwarded to Dominion Command.
- d. The members listed can still pay the current and immediate preceding two (2) years and retain their years of continuous service. The information is provided so that branches can contact the members in an effort to retain their membership.

# CHAPTER 14

# SUMMARY

#### **IMPORTANT POINTS TO REMEMBER**

- 1401. When making inquiries to Dominion Command regarding any transmittal or per capita tax submission always include: member name and number, date of the submission, amount and number of the cheque and transmittal number, if already processed.
- 1402. Always indicate your Command and branch number on all processing forms and correspondence, as well as members' names and membership numbers.

#### 1403. Important Dates:

September 1 to November 30—Early Bird Campaign.

November 1—Submission for pre-paid NEW members.

- **December 15**—Deadline for Early Bird submissions to reach Dominion Command. If received after this date, submissions will not to be included in campaign figures.
- **December 31**—Membership Renewals Membership year runs to December 31<sup>st</sup>. Members should renew before this date.
- **January 31**—Deadline for members to renew for the current year and remain in good standing.
- **February 6**—Deadline for renewal submissions, for the current year, to reach Dominion Command in order to avoid suspension of the Legion Magazine.
- **March 31**—Deadline for per capita tax to reach Dominion Command to avoid member being included on Non-Renewal Lists.
- **June 30**—Deadline for per capita tax to reach Dominion Command in order to receive a Two-Part Renewal/Membership Card for the following year.

#### Remember, Transactions Must Reach Dominion Command By The Above Dates

## LEGION MAGAZINE PRODUCTION SCHEDULE

1404. Labels for Legion Magazine are produced two months in advance of the issue date; therefore, new and reinstating members and members renewing after their subscription has been cancelled, may not receive the next immediate issue. To assist you in determining the next issue a member will receive, the following list is the estimated label production dates and the applicable issue:

<u>Date</u>	lssue
February 6	March/April
April 6	May/June
June 3	July/August
August 5	September/October
October 4	November/December
December 2	January/February

**Note:** While every effort has been made to detail fully all procedures to be used in every case by the branch, a problem or situation might arise which has not been covered in this GUIDE. If this happens, check with Dominion Command for the proper procedure.

# ANNEX A

# **PROVINCIAL COMMAND CODES**

A space is provided on the Membership Processing Forms indicating "Provincial Command Code". These are two-digit numerical codes which must be used on all forms to designate the Provincial Command in conjunction with the branch number.

They are as follows:

- 01 BC/Yukon
- 02 Alberta/Northwest Territories
- 03 Saskatchewan
- 04 Manitoba/Northwestern Ontario
- 05 Ontario
- 06 Quebec
- 07 New Brunswick
- 08 Nova Scotia/Nunavut
- 09 Prince Edward Island
- 10 Newfoundland/Labrador
- 13 Dominion Ottawa Branch
- 15 Military Member at Large Branch
- 16 Retired Military Member at Large Branch
- 17 Eastern US Zone
- 18 Western US Zone
- 19 Europe Zone

# ANNEX B

# **PROVINCIAL COMMAND INSTRUCTIONS**

#### 1. Life Application Forms

- a. Provincial Command Approval is required.
- b. Dominion Command approval is required for US and Europe Zones.

**NOTE:** All applications for Life must be submitted to Provincial Command for approval before submitting to Dominion Command for processing. Applications must be accompanied by a Member Registration Form and Member Data Change Form. Provincial Command approval must be shown on processing forms forwarded to Dominion Command. If approval is not shown on the documentation, the transaction cannot be processed and will be returned to the branch.

#### 2. New Member Application Forms

Applies to Saskatchewan Command only—a photocopy of all new member application forms should be forwarded to Saskatchewan Provincial Command.

# PART III

# **MEMBERSHIP CHAIRMAN'S GUIDE**

PART III of this manual is intended for the branch membership chairman and will also be useful to others at the zone, district and Provincial level who are involved in membership.

To meet the membership challenge each branch must have a Membership Committee and each Committee must have a leader that leader is you the Branch Membership Chairman. This guide will give you the information that you need to do the job.

The guide explains the importance that membership plays in our branches, our commands and our organization. It tells you what you need to know to develop active membership recruitment and renewal programs. It also contains many helpful hints on ways to make the membership process better for you and the member.

This should be used in conjunction with "The General By-Laws", the Processing Guide and the Eligibility Guide indicated in Part I and Part II of this manual.

Note: The use of words indicating the masculine imparts the feminine.

# **CHAPTER 15**

# **MEMBERSHIP—THE LIFE BLOOD OF THE LEGION**

- 1501. Membership is one of the most important committees in the Royal Canadian Legion. It is also one of the toughest committees to run.
- 1502. Each year we are faced with the challenge to maintain and increase our membership. This is essential if the Royal Canadian Legion is to survive as a healthy and viable organization. Every year, we lose members for many reasons, one of which is the passing on of veterans who are now in their advanced years. To these members The Royal Canadian Legion owes its very existence, therefore we must do all we can to ensure that the work they started so many years ago continues in the future.
- 1503. There are three distinct activities that the Membership Chair must undertake: renewing current members, recruiting new members and the administration of Membership. It is essential for us to have active renewal and recruitment programs at all levels of the organization, but none of these programs is as important as the one at the grassroots level, the Branch. Through the effective administration of Membership and a focus on making your Legion branch an appealing place to visit and volunteer, the task of renewing and recruiting new members is more successful.

#### **MEMBERSHIP ORGANIZATIONAL CHART**



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1504. This chart indentifies the membership structure within the various levels of the Legion. Each level should have a committee headed by a membership chairman. Some commands may have zones and districts while others have one or the other. The branch should have two sub-committees, one for renewals and one for recruitments.

#### THE DOMINION COMMAND MEMBERSHIP CHAIRMAN

- 1505. The following is a brief description of a Dominion Command Membership Chairman, what qualities he should possess and his responsibilities.
  - a. One of the Senior Elected Officers of Dominion Command;
  - b. Gives leadership and direction towards the retention of present members and the recruitment of new members;
  - c. Monitors existing membership programs and develops new ones to enhance membership activity at all levels;
  - d. Provides recommendations for programs and materials to promote membership at all levels;
  - e. Liaises with Provincial Commands and other national committees as required;
  - f. Maintains a communication link from Dominion Command throughout all levels of the Royal Canadian Legion;
  - g. Has sound knowledge of the various aspects of membership including policy, eligibility and processing;
  - h. Accepts responsibility for membership at the national level.
  - i. Motivates Membership Chairmen at both the provincial and branch level;
  - j. Meets regularly with the Dominion Command Membership Committee to assess and review the national membership situation; and
  - k. Analyzes statistical information, identifies problem areas and provides solutions.

#### THE PROVINCIAL MEMBERSHIP CHAIRMAN

- 1506. The following is a brief description of a Provincial Membership Chairman, what qualities he should possess and his responsibilities.
  - a. Is usually an elected officer of the command;
  - b. Has sound knowledge of the various aspects of membership including policy, eligibility and processing;
  - c. Accepts full responsibility for membership within the command.;
  - d. Is prepared and able to give generously of time and energy to membership;
  - e. Preferably does not hold other committee chairs;
  - f. Has developed a system to review and report through the various membership levels within the command, from Provincial, district, zone to branches, on a regular basis;
  - g. Is aware of the membership picture in each individual district, zone or branch in the command as appropriate to the command size;
  - h. Assures the appointment of membership representatives at district, zone and branch levels and works closely with them;
  - i. Has a reasonable budget at his disposal;
  - j. Keeps interest in membership alive throughout the year through meetings, workshops, bulletins, letters, etc., with particular emphasis on specific campaigns/programs, ie., Early Bird, renewals, recruitment, follow-up, CF base seminars, etc.;
  - k. Keeps the Command and Dominion Command Membership Chairman informed of its current membership picture;
  - I. Sets meaningful targets and goals for all levels of command;
  - m. Supports all categories of membership and is prepared to solve membership problems and settle differences within the command, districts, zones and branches as they occur;
  - n. Is thoroughly familiar with membership program materials and knows how to use them;

- o. Gives praise, honour and encouragement where due and censures when necessary;
- p. Rates effectiveness above popularity;
- q. Works closely with the Provincial Secretary;
- r. Thoroughly briefs a successor; and
- s. Turns over "The Membership Machine" in better shape than when accepted.

# THE ZONE AND DISTRICT MEMBERSHIP CHAIRMAN

- 1507. The following is a brief description of a Zone or District Membership Chairman, what qualities he should possess and his responsibilities.
  - a. Represents branches within their zone or district;
  - b. Assumes responsibility for branches within their zone or district;
  - c. Provides a liaison between Provincial Chairman and branches;
  - d. Possesses many of the same qualities as a Provincial Membership Chairman but at the zone and district level;
  - e. Organizes workshops and seminars;
  - f. Trains the Branch Membership Chairman; and
  - g. Zone and District Membership Chairmen work together to give support and guidance to branches and their members.

## THE BRANCH MEMBERSHIP CHAIRMAN

- 1508. The following is a brief description of a Branch Membership Chairman, what qualities he should possess and his responsibilities.
  - a. Is active and full of ideas;
  - b. Is knowledgeable of what the Legion offers, what the branch offers, and of all regulations affecting membership;
  - c. Studies and utilizes membership materials each year and orders what is required on a timely basis;

- d. Ensures that a committee is formed consisting of two subcommittees, one for renewals and one for recruitment and trains committee members appropriately;
- e. Conducts an Early Bird campaign and ensures follow-up through letters, telephone calls and personal visitations by committee members;
- f. Finds out why members have not renewed, tries to rectify any mistakes or misunderstandings and suggests improved programs to ensure member satisfaction;
- g. Organizes a recruitment campaign every year, making sure all potential members are canvassed. In conjunction with the branch Public Relations Officer, utilizes press, radio and TV in the campaign as well as membership materials available from Provincial and Dominion Commands;
- h. Promotes the work of the Legion by showing Legion films in the community, by having a Legion booth at local fairs etc., and by ensuring that the branch is the kind of branch a person would want to join;
- i. Attends membership workshops in the command and translates the ideas into action;
- j. Is a tireless worker who generates enthusiasm; and
- k. Is responsible for setting branch membership goals and ensuring the necessary tools are in place to achieve them.

#### THE BRANCH MEMBERSHIP COMMITTEE

- 1509. It is your responsibility as Membership Chairman to establish a Membership Committee by inviting current members who have expressed an interest in this activity to join you. The larger the Membership Committee, the easier it will be to cover all the activities required to achieve your goals. Every Branch Membership Committee is different, so you must find what works best for you. Having separate sub-committees for renewals and for recruitment works well.
- 1510. With your Committee, review the manuals and guides provided by Dominion Command to get a better grasp of how the Legion functions, the procedures and processes that guide activities and

to seek ideas on how to address particular issues. The following manuals are highly recommended for the Membership Chair, and any individuals who are involved in membership activities:

- a. The General By-Laws of the Royal Canadian Legion; and
- b. The Membership Manual, which includes sections on renewals, recruitment, eligibility and administration.
- 1511. The more comfortable and knowledgeable you are about all areas of Legion Membership, as well as office procedure, bookkeeping and record maintenance, the more manageable Membership becomes. You will feel confident in dealing with members when problems arise and will be able to resolve them more quickly and to the member's satisfaction. Patience, tact and diplomacy will generally lead to a positive conclusion.
- 1512. The Membership Committee should meet regularly throughout the year. While the Committee may focus a great deal of attention on the Annual Membership Renewal Campaign, membership activities should be ongoing all year long.
- 1513. All members of the Membership Committee should be fully trained in the functions they will be performing. Attendance at command, district and zone seminars should be a prerequisite to accepting the position and the Branch President should encourage attendance of all committee chairmen and committee members. Your Provincial Command should be contacted to obtain any training aids that may be available to assist you.

## MEMBERSHIP CHALLENGES AND POTENTIAL SOLUTIONS

- 1514. There are many reasons why renewal and recruitment of members may be a challenge. Some of these reasons you may already be aware of, while others may surprise you. Each branch has its own particular dynamic, and your role as Membership Chairman is to identify and address some of the issues that impact Membership in your own Branch.
  - a. **Aging Veteran Population**—There is a direct correlation between the loss of Ordinary Members (due to aging or death) and the loss of their family members as Associate Members. It is important to contact Associate Members upon the loss of the Ordinary Member in order to encourage them in renewing their Membership. The Legion still needs them!

- b. Lack of Interest in Branch Activities—Members, and particularly volunteers, like to make positive contributions and have fun at the same time. Staying in touch with members, especially those who seem disgruntled or uninterested, and actively seeking their feedback, will give you the opportunity to recommend some changes to your branch executive to revitalize branch programming;
- c. **Negative Branch Dynamics**—Petty bickering, cliques and prejudice amongst members can lead to a negative branch environment, and this can dissuade new members from joining. Again, actively seeking feedback from your members will give you a "heads up" when the branch executive needs to intercede to change a negative branch dynamic into a more positive one. Simply talking to the aggrieved parties may go a long way to satisfying everyone's needs; and
- d. **Legion's Public Image**—Consistent and effective use of Legion colours, symbols and slogans is important in presenting a unified front to the public. Promoting your branch by creating a very positive image in the community can often divert or disperse negative media attention. The Legion must tell its story, over and over, in order to let the public know who we are and what it is we do.

#### **MEMBERSHIP MUST BE GIVEN TOP PRIORITY**

1515. Membership is everyone's responsibility, but as the leader of the Membership Committee, it is up to you to organize and delegate activities in a way that will lead to the ultimate goal: Increased Membership.

There are three components to Membership:

- a. **Renewal**—Ensuring that new and existing members are getting what they need, and expect, from the Legion, so that they choose to renew their Membership year after year;
- b. **Recruitment**—Attracting new members to join the Branch; and
- c. **Administration**—Managing the paperwork and processing it efficiently and in a timely manner to give members the best possible service.

# CHAPTER 16 RECRUITMENT

- 1601. The most effective method of recruiting new members is to personally invite them to join your branch. A strong image, effective advertising and word of mouth all help to communicate that the Legion is a wonderful organization: an organization people will want to join. This section will help you develop the recruitment component of your Membership Program.
- 1602. Creating a recruitment plan, selecting recruitment tools, setting goals, assigning responsibilities to your committee members and then evaluating what was and was not successful, are essential to your Membership Program. There must be one new member recruited for each member who does not renew in order to maintain your membership numbers. If your goal is to increase membership, then the number of new members must surpass the number of those who do not renew. Reviewing and understanding your Membership Statistical Reports will assist you in estimating the number of members needed to be recruited.

# **RECRUITMENT CAMPAIGN GUIDELINES**

#### INTRODUCTION

1603. A Recruitment Campaign is an activity that has a defined beginning and end date, with the ultimate goal of attracting and signing up new members to your branch. Having more paying members leads to a more vibrant and financially stable branch. The Dominion Command Membership Committee produced this document in order to assist you with the preparation and planning of your Branch Membership Recruitment Programs. You may already be doing some of the things mentioned, however you may also learn a few new tricks to improve your current program.

#### **RECRUITMENT CAMPAIGN PLAN**

- 1604. There are several elements you might consider including in your Recruitment Campaign plan, such as:
  - a. Goals of the Campaign;
  - b. Timing of the Campaign;

- c. Assigning Responsibility of Tasks;
- d. Target Area;
- e. Target Audience;
- f. Promotion and Marketing; and
- g. Follow Up.

# GOALS

1605. With your committee, establish your recruitment goals based on the size of the target area and population within it. Setting an actual number, and then tracking your progress, is an effective way to update your committee and/or branch. People like to see visual proof that their efforts are working.

#### Suggestions:

- i. Put up a drawing of a thermometer in a high traffic area of your branch with the new member goal at the top. Periodically, colour in the thermometer and write down the number of new members signed up to date; and
- ii. Create a slogan for your campaign to generate interest and to get members to help out in the effort.

#### TIMING OF THE CAMPAIGN

- 1606. Set start and finish dates for the campaign. Timing can be crucial so careful consideration should be given to any factors that may conflict with this event.
- 1607. Your Provincial Command may have already set a date for a command recruitment campaign; if this is the case, your campaign should coincide with this event. Of course, your recruitment efforts should be ongoing throughout the year and you may wish to run a secondary campaign at a different time.

## **ASSIGNING RESPONSIBILITY OF TASKS**

1608.All committee members should be asked which activities they would like to undertake and given the resources they require. As the campaign progresses, it will be their responsibility to report back to the committee on the status of their activities.

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1609. If the committee member is only assisting in a chosen activity, they should be reminded that their participation is essential to the success of the campaign, and their efforts are very much appreciated.

#### TARGET AREA

- 1610. Decide on what geographic area to focus on within the location of the branch.
- 1611. Estimate the population in the above area and set a goal for the campaign that is reasonable and attainable. Determine the amount of effort required to meet this goal.

#### TARGET AUDIENCE

- 1612. Ensure that your committee members are familiar with the different categories of Membership. This will dictate your target audience and the types of messages that would work best in attracting them.
  - a. **Ordinary Membership**—Veterans, ex-service and stillserving military personnel, reservists, RCMP, Police Officers, Canadian Coast Guard, and others listed in the General By-Laws are eligible for Ordinary Membership. This Target Audience truly understands the meaning of service; which is the foundation upon which the Legion was built;

#### Suggestions:

- If your branch is near a military base or a police headquarters, ask if you can make a presentation, leave some promotional material to be distributed to those working there, or hang a poster; and
- ii. Work with your Branch Service Officer to identify any Veterans or families of Veterans in the area who are not yet members.
- b. **Associate Membership**—Connecting with the family members of the individuals who are eligible for Ordinary Membership is a great way to sign people up for Associate Membership. This Target Audience possesses strong ties to those who have served and form a strong link to the past.

#### Suggestions:

- i. You can initiate a promotional event and offer an incentive to get Ordinary Members to sign up their family members (ie. "Bring in three, get one free").
- c. **Affiliate Membership**—This category is possibly the one that will ensure the survival of our great organization. These members have no direct link to those who have served and yet they believe in what the Legion stands for. Baby Boomers (ages 50-65) in particular, may be looking for fun activities during their retirement and may be interested in making productive contributions to their community through volunteering at the Legion.
  - i. **Affiliate Voting Membership:** This is the newest category of membership open to Canadian Citizens and Commonwealth subjects of federal voting age, who do not qualify for Ordinary or Associate Membership; and
  - ii. **Affiliate Non-Voting Membership:** At the Dominion Convention in 2006 the eligibility requirements for this category of membership were changed to allow Non-Canadian Citizens and Non-Commonwealth subjects who are citizens of an allied country to apply for membership. Affiliate Non-Voting members have the same rights and privileges as other members except the right to vote and hold office.

#### Suggestions:

- i. Any guests who walk into the Branch are potential members and should be approached;
- ii. Encourage the parents of any young people who benefit from Legion sponsored activities to become members;
- iii. Approach guests who express an interest in playing sports such as darts, slow pitch, 8-ball etc and encourage them to join the Legion;
- iv. Set up an "open-house" at your branch and invite community members to attend;
- v. Set up a booth or table at the local shopping mall and hand out promotional material; and
- vi. Invite speakers to make presentations at the branch and invite community members to attend.

## **PROMOTION AND MARKETING**

- 1613. Work with the Branch Public Relations Chairman and his or her committee to promote the recruitment campaign in the local media including local newspapers, radio and television. The Public Relations Committee can assist in producing a written appeal to the community for members by listing all the activities that the branch has supported in the community. Stress the need for the Legion's presence to continue supporting their programs and to provide a base for Remembrance and to ensure our seniors, Veterans and military personnel are cared for.
- 1614. Decide on what techniques will be used to conduct and promote the campaign, for example:
  - a. Set up a booth or table in a public forum such as a shopping mall, arena, marketplace, store, sidewalk, fairground, etc., or at an appropriate function such as a health or home-show, sports forum or at a production of the local theatre group doing a show with a military theme;
  - b. When using a booth in a public forum you may want to invite the Service Officer or Public Relations Chairman to help in the booth in order to enhance the information you are offering to the public;
  - c. Use all the free resources from Dominion Command in the booth such as posters, pamphlets, leaflets, bookmarks etc. Items that are available are listed on the Supply Requisition Form and can be ordered from Dominion Command free of charge;
  - d. Use the same free material mentioned above to post on public bulletin boards and shop windows in the campaign area. The committee may want to make their own posters using their own themes or slogans; and
  - e. Use incentives to encourage other members to help bring in new members such as, "Bring in Three Get Yours Free". This offers a free membership to those who bring in three or more new members.

#### DOMINION COMMAND MEMBERSHIP RECRUITMENT TOOLS

- 1615. Dominion Command has developed some communication tools and items to assist branches with their recruitment campaign:
  - a. Welcome to the RCL Booklet (for new members)—Insert your new member's card inside this handy booklet for Legion information "at a glance";
  - b. RCL Bookmark—This is an ideal item for placing in libraries and other public areas. They take up very little room and yet can provide a strong message about the Legion to the general public;
  - c. **Flyers**—There a number of flyers available for general and military target markets;
  - d. **The Royal Canadian Legion Needs You Brochure**—This brochure is aimed at the general public and it outlines what the Legion is and what we do. It should be used to promote membership in the branch, shopping malls, at local community events etc.;
  - e. The Royal Canadian Legion & The Canadian Forces Brochure—This brochure is aimed at serving members of the Canadian Forces and emphasizes the close connection the Legion has with the military. It outlines what the Legion can do for members of the forces, and how they in turn can help the Legion maintain the important work it does for veterans, serving and ex-serving members of the forces and the community at large;
  - f. **"See you at the Legion" Cards**—These business cards provide contact information for someone at the branch;
  - g. **Postcards**—These postcards can be used as hand outs or mailed to prospective members in your target area; and
  - h. **Gift Membership Kit**—This is a great way for current members to participate in recruitment by signing up a loved one or friend.

# **OTHER RECRUITING SUGGESTIONS**

- 1616. The following are just a few suggestions that may help in your recruitment programs. Each branch may have their own unique situations that should also be considered.
  - a. Stimulate all members of the branch to become involved in bringing in new members;
  - b. Use the brochures and posters that are available from Dominion Command to let potential members know what the Legion is doing;
  - c. Invite potential members to accompany you or a friend to your branch, especially for a social occasion;
  - d. When guests are in the branch make them feel welcome and don't hesitate to approach them with the suggestion of becoming a member;
  - e. When potential members decide to join, assist them in completing application forms and ensure that all the information required is included in the forms;
  - f. Membership Statistical Reports are posted on the Royal Canadian Legion website and should be reviewed each month in order to familiarize yourself and your committee with your branch membership. These reports will help you determine your recruitment requirements; and
  - g. In order to reward your top recruiters you may wish to order specially designed Membership tie clips, bracelets, card holders etc. that are available from the Dominion Command Supply Department. For more details see the Dominion Command Supply Catalogue. You may also wish to reward your recruiters with items from your Provincial Command supply departments such as jackets, watches etc.

## FOLLOW UP

- 1617. When your Recruitment Campaign is over, you should assess the success of your efforts and determine if you met the goals.
- 1618. Make a list of what was successful and what was not so that you will have this information to refer to for the next campaign.

#### **NEW MEMBERS**

1619. With a successful Recruitment Campaign plan you will reap the rewards of new members. In order to ensure that your new members are made to feel like a part of the Legion as soon as possible you must process the application and integrate the new members into your branch.

#### **PROCESSING THE APPLICATION**

- 1620. Ensure that all applications are processed efficiently. Obtain all the necessary information and collect the appropriate dues for the current year (one-half year after June 30<sup>th</sup>, one-third year after August 31<sup>st</sup>).
- 1621. After the application has been approved at a general meeting, send the per capita tax to Dominion Command in a timely manner and ensure all required paperwork is completed correctly. The Membership Card should be received in time to present to the member at the time of initiation.

**Note:** If the applicant does not pay dues for the current year, but pre-pays for the following year only, the applicant does not become a member until January 1<sup>st</sup> of the year paid and should be advised as such. These memberships must not be submitted to Dominion Command prior to November 1<sup>st</sup>.

1622. The "Membership Manual" should be used as a reference tool for processing new memberships.

#### **INTEGRATING NEW MEMBERS**

- 1623. As stated in the "General By-Laws", all members initiated shall receive a copy of the General By-Laws. The branch should also provide them with lapel pins indicating their membership category.
- 1624. All new members should receive a copy of the "Welcome to The Royal Canadian Legion" booklet. This provides a comprehensive introduction to the organization and their membership cards can be inserted in the back of the booklets. These are available from Dominion Command at no cost to the branch.

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- 1625. At the initiation ceremony branches may wish to present the new members with an information package to help them better understand The Royal Canadian Legion, as well as, the functions of the branch. This package would provide new members with information that they should be aware of. The package contents could include the following:
  - a. Welcome letter;
  - b. Initiation Certificate;
  - c. Welcome book with Membership Card;
  - d. Legion Pin;
  - e. Branch By-Laws;
  - f. General By-Laws;
  - g. Member Benefits Executive Members;
  - h. Bookmarks;
  - i. List of Branch Executive Members;
  - j. List of Committee Chairs;
  - k. Poppy Campaign Review;
  - I. Listing of Branch Events and Meeting Schedule;
  - m. List of Branch Community Support and Community Donations;
  - n. Copy of Branch Newsletter;
  - o. Branch History;
  - p. Branch Contact Business Card; and
  - q. Branch House Rules.
- 1626. Once you have a new member signed up and initiated, the work of the Membership Committee does not stop there. The final part of your Recruitment Campaign is important to ensure that all your efforts provide long-lasting results. Research has shown that the majority of our non-renewals (not including the deceased) occur during the first and second years of membership. While your committee may be able to assist in this endeavour, it is crucial that the rest of the branch executive and their committees provide assistance.

- 1627. Make sure new members are introduced to other members, especially to those with the same interests. Ideally, this should be done during social hour following the initiation.
- 1628. The Branch Executive must make sure new members are made to feel welcome by members and staff. They must be encouraged to participate in some small way that will eventually establish them as contributing members. These new members will create a pool of potential future leaders in the organization. While some may be content to give the occasional helping hand, others may go on to become Dominion President. The key is to help all members find their niche where they can be both comfortable and productive.
- 1629. Pair new members with seasoned members to act as mentors. Ensure all new members are given an orientation of the branch and the Legion in general.
- 1630. Determine the likes and dislikes of new members and get them involved in the branch accordingly.
- 1631. All members should be encouraged to serve on branch committees. Find out how their expertise can benefit the branch and offer them the opportunity to serve on an appropriate committee where their skills can be best utilized.
- 1632. Explain the functions of the various committees so that the new members have a full understanding of what is expected of them. All branches should have committees as follows:
  - a. Social & Entertainment—This includes branch social functions such as dances, socials, bingos etc., as well as entertainment in the canteen or lounge;
  - b. Ways and Means—Fundraising projects of all descriptions;
  - Building and Property Maintenance—Projects required to keep the branch building and other property in proper state of repair;
  - d. **Public Relations**—An invaluable area for participation where many possibly have experience and connections;
  - e. **Bulletin**—Editorial and policy matters, typing, copying, mailing, etc.;

- f. **Veterans Service**—An excellent area for participation with Service Officers;
- g. **Bursaries and Scholarships**—Those who are in education or have benefited from this program would probably appreciate an opportunity to serve on such a committee;
- h. Sports and Youth Leadership—Those who have worked with young people in the community would enjoy being involved in the many youth programs the Legion supports;
- i. Housing & Care of the Aged—Here again, those with special skills could be of valuable assistance such as nursing, property management, catering, entertainment, etc.;
- j. Community Involvement—Many community projects are undertaken by branches. This is an excellent field for those who are outgoing and community minded;
- Poppy Program and Remembrance Day—Another excellent committee to educate members in the aims and objects of the Legion;
- Colour Party—Properly trained members could fill this important function, at the same time making them aware of the traditions of service and also an awareness of a Canadian identity;
- m. **Hospital Visiting**—Could cover hospital, nursing home and residence visiting; and
- n. **Membership**—This committee is one of the most important in the branch. It should consist of two sub-committees; one to manage renewals and one to manage new members.

# **CHAPTER 17**

# **MEMBERSHIP RENEWALS**

1701. Renewals are an important aspect of all membership programs. It is easier to get a member to renew than to go out and recruit a new member. The renewal period begins in September with the Early Bird Campaign and members should be renewed by January 1<sup>st</sup>, however, members are considered in good standing until January 31<sup>st</sup>. Those not renewed by this date cannot participate in branch activities and delivery of Legion Magazine will be suspended.

#### **MEMBERSHIP RENEWAL PROGRAMS**

1702. The national renewal goal is to achieve a 90% renewal rate every year. Current members are more likely to renew if they feel the branch is meeting most of their needs and they feel an attachment to the branch and other members. People are also very busy, and may not automatically remember to renew their membership, even though they fully intend to. It is important to participate in the national renewal campaign and to take advantage of the communication tools/processes that have been developed to assist branches.

#### EARLY BIRD & RENEWAL CAMPAIGNS

- 1703. The Dominion Command Membership Committee has set the national renewal goal at 90%. The sooner you begin your renewal campaign, the more likely it is that your branch will achieve or surpass this goal. August is a great time to start planning your renewal campaign.
- 1704. The most successful branch renewal programs are those that begin with the Early Bird Campaign, which commences in September. A member must pay by November 30<sup>th</sup> to qualify as an Early Bird and payment must reach Dominion Command by December 15<sup>th</sup>. The branch has the opportunity to receive an Early Bird Award if it renews 75% or more of its members during the Early Bird Campaign period. The branch will receive a certificate from Dominion Command for which a seal is issued each year that the branch achieves between 75-100% renewals before November 30<sup>th</sup>.

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- 1705. Your branch's Early Bird and Renewal Campaign may incorporate some or all of these components:
  - a. Promote the Early Bird Campaign with an event launch, advertisements, announcements, and use incentives to encourage early renewals, i.e. free membership draw;
  - b. Send at least one dues notice to all members during the Early Bird and Renewal Campaign period – September 1<sup>st</sup> to December 31<sup>st</sup>. Many members are busy and do not think about renewing unless they receive a reminder notice. Any members who have not paid their membership dues by November 30<sup>th</sup> should receive a friendly reminder;
  - c. Provide Early Bird stickers for members who participate in the campaign. This is a tangible indication to the members that their early renewal is recognized. These stickers can be ordered from the Dominion Command Supply Department free of charge. You may also consider other incentives to recognize Early Bird members such as hosting a dinner in their honour, or having an Early Bird draw for the chance to have their dues reimbursed or to win some other prize;
  - d. Organize telephone committees to follow up on non-renewals and inactive members. If you discover that a member has moved or passed away, then complete the appropriate forms to indicate the change to Dominion Command, so that membership records may be updated. Personal contact may also help resolve some small complaint that may be leading to their reluctance to renew their membership;
  - e. Encourage members to renew even if they are not actively involved in the branch and make them feel like a part of the Legion family. Their dues support many branch programs and their contribution is essential to the financial health of the branch. They also lend their voice to the national advocacy efforts to make changes in how governments create and manage programs for veterans, seniors and for Canadian citizens across the country;
  - f. As you make contact with members, seek feedback on how to make the branch and its programs more attractive and interesting; and

g. Impress upon members that branch dues are payable the first day of January to maintain their "good standing" status. A member who is no longer in good standing will lose their right to vote, their ability to participate in branch activities and delivery of Legion Magazine will be suspended. There is a one month grace period, but the reminder of these facts will encourage them to renew.

#### DOMINION COMMAND MEMBERSHIP RENEWAL TOOLS

- 1706. Dominion Command has developed some renewal tools and items to assist branches with their Early Bird and Renewal Campaigns:
  - a. **Early Bird Letter/Letterhead**—The Early Bird form letter is designed to be a quick and simple way to remind members to support the Early Bird Campaign. The branch has only to insert the amount of the dues and sign the letter. Plain letterhead is also available and may be used to print your own individual branch message promoting the Early Bird Campaign. These letters should be sent between September and November;
  - b. Dues Notice—These invoice-type notices are designed to be sent out to members as a reminder that it is time to pay their membership dues. They are business-like and easy to use. Branches are encouraged to send these to all members who have not renewed during the renewal period. These notices should be sent between September and January;
  - c. **Reminder Postcards**—This "Time is Running Out" notice offers a light-hearted approach to encourage members to renew their membership. These postcards should be sent between September and January;
  - d. Early Bird Stickers—Recognize your members' effort to renew early by giving them a sticker to place on their membership card;
  - e. **Early Bird Poster**—These can be placed around the branch as a reminder to all members who have not yet renewed. These posters should be displayed between September and November; and
  - f. **Renewal Poster**—Once the Early Bird portion of the campaign is over, these posters can be displayed during the months of December and January. The change in image and message will attract branch members' interest.

# **CHAPTER 18**

## OTHER COMMUNICATION AND REFERENCE TOOLS

#### **BRANCH MEMBERSHIP COMMUNICATION TOOLS**

- 1801. **Membership Board**—A suitable membership board, displayed in a prominent place in the branch is a credit to the membership committee and informs members of what is happening with its membership. Some branches use different coloured cards to differentiate between paid up and delinquent members; however, caution should be exercised by the committee to investigate the attitude of the branch before doing so, as the policy may not always be acceptable. It is important for the membership chairman to keep the board up-to-date at all times.
- 1802. **Branch Bulletin**—This is undoubtedly the best means of reaching your present members and should be used to its fullest advantage at all times in regards to membership. Again, branches must budget for the production and mailing of this publication.
  - a. You should liaise with the editor of the publication to ensure that issue dates coincide with your branch membership campaigns;
  - b. Communication regarding programs, upcoming events and particularly membership dues, is a must to maintain contact with your members; and
  - c. This is especially important with those who do not or cannot frequent the branch regularly. Even though they may be passive members, they are still important because by paying their membership dues each year, they continue to support the Purposes and Objects of the Legion. They also provide the voice the Legion needs to make a difference when lobbying the government for veterans, seniors and other Canadian citizens across the country.
- 1803. **Public Relations**—In order to ensure successful renewal and recruitment campaigns you must promote your programs, your branch, and the Legion in your community through the

local media. Dominion Command publishes a "Public Relations Manual and Speakers Guide" for your reference. This manual will provide the information needed to conduct effective public relations campaigns supporting your branch activities.

- 1804. **Dominion Command Membership Calendar**—The Dominion Command Membership Section produces a membership calendar which includes the following key dates:
  - September 1 Launch of the Early Bird and Renewal Campaigns
  - November 30 End of the Early Bird Campaign
  - December 15 Dues must arrive at Dominion Command in order to be included in the Early Bird Campaign figures
  - December 31 End of Renewal Campaign
  - January 1 Members in Arrears
  - January 31 Deadline for members to renew and remain in "Good Standing"
  - February 6 Renewal submissions must arrive at Dominion Command to avoid cancellation of the LEGION Magazine.

Please refer to the membership calendar to ensure you do not miss any important deadlines.

1805. **Information on Service Records**—Questions are often asked of Membership Chairmen, particularly from prospective members, regarding information on misplaced service records, medals etc. Unfortunately this information is not available from Dominion Command, nor under the Access to Information Act can Dominion Command obtain it. Under this act, personal information is only available to the individual concerned or, in certain cases, to a member of their immediate family. Please refer to the Eligibility Guide of the Membership Manual for information on who to contact to obtain service records and other such items.

# CHAPTER 19 The big picture

- 1901. We have looked at membership activities at the branch level, but the branch cannot fight the membership battle alone. Dominion and Provincial Commands have a part to play.
- 1902. We have talked about some of the ways you can help to promote membership in your branch, by working together as a team. The success or failure of your branch to have a healthy membership does not depend on your membership committee alone. As we have said many times, Membership is Everybody's Business.
- 1903. The membership team does not stop at the branch; it is at all levels of the organization. If branch, zone, district, provincial and Dominion Command committees all work together to develop strong leaders, good programs and a good public image, we should have no trouble renewing and recruiting members from year to year.
- 1904. The bottom line is, if we are to be successful and maintain the level of service we give to Veterans, ex-service people, their families and our communities, we must maintain or increase our membership. To do this, we must ensure the highest possible rate of renewals, and for every member who does not renew, regardless of the reason, we must bring in new members to replace them.
- 1905. When we talk about membership, we are talking about the future of the Legion, and the future of the Legion depends on our existing members.
- 1906. Two of the many assets of age are the wisdom and experience gained over a lifetime. If we are to survive, this knowledge and sense of commitment must be passed on to new generations.
- 1907. To attract new people into our organization, we must be dynamic and in tune with the times. One of the challenges is to convince people that the Legion, with all its tradition and history, is very worthwhile and deserving of their attention and support.

- 1908. More importantly, we must convince these people that there are places for them in the Legion and make it attractive to them to the point that they are motivated to be a part of us.
- 1909. We must demonstrate that the original purpose, for which the practices and traditions of the Legion came into being, is still valid today. There are people who are more than capable, more than ready and more than deserving of the opportunity to carry on with, promote, enhance and retain that which we consider important to the Legion. Some of them know it; many more still need to be convinced. Our task, therefore, must be to rebuild and maintain a strong and active membership to take this great Canadian organization into the future.
- 1910. In those early days in 1926, Legionnaires held the torch of Remembrance high. They had a vision for a long and healthy future. Much has been done over the years to achieve that vision. Today we must continue to strive to hold the torch high.

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