



**The American Legion
Department of New Jersey**

“Moving Forward”

**Operating Strategy for the Department of New Jersey for the
Next 100 Years**

Ad Hoc Advisory Committee – 2020

FINAL REPORT - 2020

TABLE OF CONTENTS

EXECUTIVE SUMMARY 3

COMMITTEE OVERVIEW 5

INTERNAL TOPICS 7

EXTERNAL TOPICS 17

APPENDIX 23

DEPARTMENT OF NEW JERSEY TECHNOLOGY PLAN 24

21st CENTURY AD HOC COMMITTEE REPORT NATIONAL 41

NATIONAL RESOLUTION NO. 4 2020 56

NATIONAL RESOLUTION NO. 5 2020 57

NATIONAL RESOLUTION NO. 38 2020 58

VETERANS ASSISTANCE PROGRAM NJ 2019 59

DEPARTMENT COMMITTEES AND AWARDS PROGRAM 60

EXECUTIVE SUMMARY

The Department of New Jersey realized that the American Legion has arrived at a critical crossroads in its history. With over 100 years of service and the importance of sustaining that service into the next 100 years the reality of declining membership and a small influx of new members this goal is in jeopardy. Without serious self-examination of past and current practices there is little chance of sustaining the Department in future years.

The Ad Hoc Committee was formed to address this self-examination and provide a suite of recommendations to the Department. The Committee was tasked to identify current and future challenges facing the Department of New Jersey in attracting and retaining Post 9/11 veterans while simultaneously strengthening and empowering our current membership.

The result of this work is captured in this report. This report is intended to provide the basis for detailed plans to be refined and executed from 1 to 5 years. Further the recommendations in the report are intended to be addressed not only at the Department level but will require cooperation at County and Post level. Without full acceptance by Counties and Posts we will not succeed in changing the Department. Finally, the Committee ensured that the traditions of the American Legion were considered and proven programs supporting the 4 Pillars of the American Legion were part of any recommendation as applicable.

The recommendations are captured in a set of Internal and External recommendations. We found that there is a great deal of cross over between these two sets of recommendations. With that conclusion the reality is that most recommendations do not stand on their own but are connected to and supportive of another recommendation.

The Committee did find that past practices which were tied to “we have always done it this way” are counter-productive and are obstacles to change and threaten the survival of the Department. What may have served us well in the past is no longer applicable and may in fact be detrimental to our future. An example is resistance to using “myLegion” for membership and continuing to rely upon paper cards and checks to process memberships. In the past there was no alternative so of course this was the most efficient method to process membership. This is no longer the case as an alternative exists that is both expeditious and efficient.

The Committee found that technology is related to almost every recommendation. From updating existing IT systems to expanding the American Legion’s social media footprint all relied upon a deep review of our current state and a viable future state. The conclusion is that we required an investment in upgrading or adding new capabilities for the Department. We have addressed this in the Appendix covering technology and recommendations will reference that report as applicable.

KEY TAKEAWAYS

- 1) As an organization we cannot avoid tough questions, shedding ineffective practices, and investing in the Department’s future if we expect to survive. The recommendations may be perceived as controversial as they challenge the status quo, they do so, but should not be seen as controversial nor placing blame on any single individual or committee, they simply require a paradigm shift in the Department. Such core changes can often be viewed with skepticism and resistance to change is natural. Change is inevitable and either the Department proactively shapes such change or reacts to it. The later choice is not a strategy and will ensure the continued decline of the Department.
- 2) This strategy will ONLY be successful with input from all levels of the Department of New Jersey. As implementation of the strategy is primarily at the Post and County level their input is essential to moving forward.
- 3) Practices that are arbitrarily tied to tradition, “we have always done it this way”, are relics of the past and rooted in demographics and culture that are no longer drivers for younger members and prospective members. These attitudes are obstacles to moving forward.

- 4) Resistance to technology cannot be accepted. Posts must find members who are willing to embrace technology in order for the Post to advance and remain viable, otherwise they risk dwindling membership and irrelevance in their communities.
- 5) Every program and committee in the Department at all levels must be reviewed for the return on investment. If we cannot justify why we do something and cannot measure a return, the program should be shelved or eliminated. The same applies to Committees at all levels.
- 6) Other Veteran Service Organizations (VSO) are NOT our competitors. They should be viewed as partners and opportunities for collaboration must be explored and acted on. Newer VSOs have captured the hearts and minds of the Post 9/11 veteran, we must learn from their approach, not shun them.

As the Committee continued refining our recommendations the realization that many were related to those proposed in the report by the National 21st Century Ad Hoc Committee Report validated that we were not proposing changes outside of what others have identified. Therefore, as applicable we have referred to that report.

With this report the Department has a basis to begin to the difficult task of further expanding upon these recommendations in support of an implementation framework across the entire Department. With a consensus in the Department on the recommendations and implementation plan the future of the Department will be one of opportunity and potential rather than stagnation and extinction.

For God and Country,

The Ad Hoc Committee

COMMITTEE OVERVIEW

Vision Statement:

Creating a Compelling Proposition for the Next Generation to Sustain the 4 Pillars of the American Legion, while fulfilling the mission, vision and values of the American Legion.

Mission Statement:

The objective of the Ad Hoc committee is to deliver a one to three-year strategy and provide specific, achievable and measurable recommendations for the Department of New Jersey to recruit and retain the next generation of veterans.

Duration:

The Ad Hoc Committee will have until January 2021 to complete its work and provide actionable recommendations/resolutions to the Department of New Jersey. This will provide adequate time for consideration by the Department of New Jersey for adoption at the either a Department Executive Committee meeting or at the 2021 Department Convention.

Methodology:

The Ad Hoc Committee will follow a simple methodology to generate solutions based on the intent outlined in the mission statement. Specific and actionable tasks are to follow the TPME methodology.

- Task – the what - based upon the outcome of a specific research finding
- Purpose – the why – basis upon which task is necessary to accomplish the mission how this task contributes to the overall project
- Method – how the issue will be addressed, required resources, personnel, etc.
- Endstate – the expected outcome if steps are completed successfully (if task is accomplished and purpose is achieved) – quantifiable.

Our research findings and recommendations should be specific, achievable, measurable – we have already addressed the principal for time constrained by establishing milestones and committee duration.

Relevance will be achieved using the Task, Purpose, Method, Endstate methodology, as the committee will ensure that any particular recommendation has a purpose.

As required recommendations will be proposed as resolutions per the prescribed process established by the Department of New Jersey.

The intent of this committee is to provide a plan that can be implemented over a 1-5-year period by responsible leaders/committees in the Department of New Jersey. There is no intent to implement all recommendations immediately after conclusion of the committee’s work. Each recommendation will include an implementation recommendation which will include timeframe, milestones, and at which level within the Department of New Jersey will be involved with implementation.

Due to the comprehensive nature of the Department of New Jersey Technology report it is include as a separate appendix to this report. Under the Internal and External topic items the technology report is referenced as required.

In order to ensure the recommendations of this committee to the Department of New Jersey contemplates efforts at the National level of the American Legion the “21st Century Ad-Hoc Committee Final Report” (October 16-17, 2019) is

referenced in the report. There are numerous supporting efforts at the National level that can provide a foundation for work to be accomplished at the Department (down to Post) level.

Organization:

The committee decided it is advantageous to organize the Committee into three working groups. The working groups and their purpose are:

Internal Group – focus on actions specific to the Department of New Jersey and its Posts.

- Steve Fisher
- Tony Gladden
- Will Fetherman

External Group – focus on external outreach to veterans, families and other veteran service organizations.

- Mary Jo Burkhard
- Amery Vasso
- Jack Dunne
- Dennis Duddie

Resource/Floater Group - works in collaboration with internal and external groups finds resources/solutions for recommendations.

- Danny Dunn
- Rich Godfrey
- Others parties that are vested in the outcome of the Committee (e.g. NEC, ANEC, Department Commander, etc.)

INTERNAL TOPICS

INTERNAL

1) Legion Footprint

- a. How effective is the footprint of Posts in NJ? Is it too broad, concentrated, aligned with shifting demographics of community?
 - i. Current footprint based on demographics from previous war eras. A great deal has changed in 75 years since the last major expansion of the Legion footprint.
 - ii. Concentration issues exist in a number of localities. Saturation of not only Legion Posts but other VSOs impacts viability of Posts in a given location.
- b. Honest assessment of viable Posts
 - i. Path to Viability or Closure
 - ii. County Commanders and posts will need to look at all their posts after the pandemic and recheck for viability.
 - 1. As required not viable posts revitalization should first be considered.
 - 2. If that is not feasible then work to consolidate that post with a viable post.
 - 3. Extenuating factor are those posts with mortgages. This requires additional evaluation and may require specific guidance from Department and National to remain viable.
 - a. This requires additional evaluation and may require specific guidance from Department and National to retain those viable posts.
 - b. Fundraising support by County and Department to help bolster viability of those posts.
 - c. Small Business Administration is a possible resource for guidance in mortgage situations.

APPLICABLE TO	Department/County/Post
REFERRED TO	Dept VC's, County DEC and County Commanders
IMPLEMENTATION TIMEFRAME	This phase will be in phases, some posts may be immediate and certain post may need more time, some posts are not even open yet and County Officer's need to keep reaching out to Post leadership to assist them in any way they need.
BUDGET REQUEST	Coordinate Budget with External Topic #2 Advertising

2) Investment

- a. General Budget – Finance Committee Chairman Gene O’Grady stated there will be funds available. Specific numbers to be determined.
 - i. Existing line items will remain
 - ii. A line item was added to budget for Department Vice Commanders to attend the Membership Conference.
- b. Membership and Recruitment Budget
- c. Advertising Budget
 - i. No line item for advertising, as of now.
 - ii. Recommend including one in future budgets.
 - iii. Specific Advertising Recommendations:
 - 1. Spartan races, Mud runs, ¼, ½ or full page add, maybe banners from distributors to be made.
 - 2. Billboards to fill in run on ads or blank space.
 - 3. Radio and TV PSA’s for non-ads or blank space.
 - 4. Papers (contact to see where unpaid areas could be donated for legion ads, tax write off for the companies)
 - 5. Encourage Posts/counties to contact local chamber of commerce and rotary clubs to help them with advertising and/or promote programs.

- 6. Contact Paul Rotella- NJ Broadcasting Association which could be another avenue for networking.
- iv. To establish a line item, eliminate the NJ Legionnaire and hire a consultant (and marketing) with the budgeted \$35,000. Upon review of other programs that are not functioning and may be relics of past practices reallocate money to advertising/marketing that are not relevant (reference #9 this report)
- d. Event Budget
 - i. Recommend that a “Swag” bag for job fair attendees be budgeted.
 - 1. Possible implementation could be for \$500-1000 be assigned to each of the 21 counties.

APPLICABLE TO	Department/County/Post
REFERRED TO	DEC and Finance Committee
IMPLEMENTATION TIMEFRAME	Within 1 year
BUDGET REQUEST	Yes - Annual

3) Training

- a. Create a Training Committee – composition Legion College Staff and NALC graduates
- b. Career Paths and Roadmap for Officer Positions
- c. Technology training for Post Officers (offer as Legion College Course – basics)
 - i. Legion college meets and discusses curriculum updates. Us this as a method for implementing these recommendations into the curriculum.
 - ii. Recommend a mentorship type program throughout all levels (post, county, and dept.)
 - 1. Mentorship program should include the do’s and don’ts
 - 2. Use a common template to ensure consistency amongst the Posts up to the Department.
 - 3. This way we can make sure those “Faking the Funk” know how to do those positions they are in.
 - 4. Format of mentorship/training should be based on a multi-faceted approach.
 - a. Varied teaching styles (classroom, OJT and online seminars)
 - b. Consider learning style (e.g. people learn in different ways)
 - c. Consider duration of time for each approach – availability of student’s time balanced against learning style is a crucial consideration.
- d. Recommend counties facilitate seminars where Subject Matter Experts (SME) can attend to:
 - 1. Explain task and purpose of the Training Committee (to be created)
 - 2. Expand knowledge of current Department programs and committees.
 - 3. To foster participation in Legion college.
 - 4. To elicit feedback from attendees for consideration by the Training Committee.
 - 5. To identify potential committee members as positions across Department often are unfilled.
- e. Recommend that Counties implement a meet and greet. Similar to one that the incoming Department Commander has after his installation. Concurrently invite Committee Chairman to attend to share information about their committees and programs.
- f. Institutionalize “Mobile Training Teams” by developing course curricula that is portable, technology friendly, and can be accomplished by the dedicated team in one day.
- g. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Basic Training Course (Report page 5)**
- h. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Training (Report page 7-9)**

APPLICABLE TO	Department/County/Post
REFERRED TO	DEC (For Creation of Committee), Legion College Committee
IMPLEMENTATION TIMEFRAME	6 months

BUDGET REQUEST	Yes – Supplemental to Legion College Budget. Technology Budget addressed in Appendix – Dept Technology Plan
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4) Onboarding

- a. Department needs to lead the onboarding program.
- b. New Member Orientation – Online
 - i. Individual
 - ii. Family
- c. Recommend the creation of a composite Welcome to the Legion Family by the Department leaders (Legion, Auxiliary, and SAL). Provide link to the video that can be shown to new members or direct them to the link. This would be done annually with each group of new leaders.
 - i. Recommend budget item for professional media creator.
- d. Recommend that the Department lead the effort to create short videos on programs. This could be an efficient method to engage veterans and their families.
 - i. Recommend budget item for professional media creator.
- e. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Basic Training Course (Report page 5)**

APPLICABLE TO	Department/County/Post
REFERRED TO	DVC, PC, CC, County Membership, DEC’s and Adjutants at Post and County level.
IMPLEMENTATION TIMEFRAME	Phases so everyone can get the training or immediately if it is online.
BUDGET REQUEST	Yes - This should be annual, if we don’t use it so be it, but need to have it approved annually if need or improvement is required.

5) Technology - General

- a. Posts **MUST** embrace technology
 - i. Commander/Adjutant/Membership must at a minimum understand and use technology.
 - ii. The current situation has exposed the inherent weakness on relying on a single method to conduct business. Virtual methods are a necessary alternative that Posts must be able to execute.
- b. Review and evaluate all IT type contracts and processes at Department, and develop a proposal to enhance, of course including costs.
 - i. Secure the service agreements from department in order to determine current state and advise on changes that
 - 1. Enable the Department staff to work efficiently, support technology platforms, facilitate virtual meetings,
 - 2. Facilitate periodic hardware and software replacements and updates.
 - 3. Survey the office staff to determine their needs. Focus on needs of the staff to execute their daily task, reducing stress, increasing efficiency and potentially save money.
- c. Understand this is under progress however time is of the essence because of budget availability and the requirements imposed on the American Legion due to current COVID-19 situation.
- d. Recommend that access to the Department Facebook account be broadened.
 - i. A single approval authority is inefficient and stifles the ability to share timely information to and from Posts
 - ii. Further it does not encourage the embrace technology message the committee is promoting.
- e. Utilize subject matter expertise (e.g. Zoom, Teams knowledge) to create a mobile training team to assist Department/Counties/Posts in setting up and facilitating virtual meetings.

APPLICABLE TO	Department/County/Post
REFERRED TO	Department Technology Manager

IMPLEMENTATION TIMEFRAME	Per Technology Plan - Will take years due to time frame to purchase and install and train Department personnel.
BUDGET REQUEST	Yes - This should be annual, if we don't use it so be it, but need to have it approved annually if need or improvement is required.

6) Technology – Website/Social Media

- a. Each County must have a website – social media
 - i. Counties and Posts must embrace. Start small and as expertise/confidence grows expand the offering and substance contained in the platform.
- b. Group Rate – Search for package deals, e.g. website, social media, phones, etc.
 - i. Potentially group rates for counties – e.g. all posts have access to a package and the share the expense of the overall cost.
- c. Partner with a in state developer.
 - i. First look into local organizations and in state developers to help with costs and getting programs out.
 - 1. Balance against Legion Policies and procedures with non-profit status and non-political affiliation.
- d. **Refer to Department of New Jersey Technology Plan (2020) – (Appendix page 19)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department Technology Manager
IMPLEMENTATION TIMEFRAME	Per Technology Plan - Will take years due to time frame to purchase and install and train Department personnel.
BUDGET REQUEST	Yes - This should be annual, if we don't use it so be it, but need to have it approved annually if need or improvement is required.

7) Technology – Tech/Media Coordinator

- a. Revise Publicity/Media to include web manager, social media, etc.
 - i. Broaden those authorized to add to website and social media
 - ii. Empower Committee Chairman to manage their specific area of the Department website. Provide them information on Posts to facilitate programs (specific information required is to be determined)
 - iii. Review controls on the publication of information on tech platforms.
- b. Examine the creation of an information manager at Department level (perhaps supported by other members) to accomplish:
 - i. Production of Department and National publications
 - ii. Dissemination of materials
 - iii. Upload onto Department website
- c. Open to non- members who are talented to manage social media?
 - i. Examine partnerships with local colleges/technical schools to support tech requirements, maintain websites, social media.
 - ii. Promote the use of veterans enrolled in such programs.
- d. Research benefits of a level 5 license.
- e. **Refer to Department of New Jersey Technology Plan (2020) – (Appendix page 19)**

APPLICABLE TO	Department/County/Post
REFERRED TO	DEC, Revised Legion
IMPLEMENTATION TIMEFRAME	Within 1 year
BUDGET REQUEST	No – Other than what is outlined in Department Technology Plan

8) Meetings – Post - Break the Status Quo

- a. Make Post meetings family night/event.
 - i. This should be a top down focus. Department can provide the model and each level down to post can adopt best practices from Department.
 - ii. Provide techniques to engage families and welcome them to meetings (as appropriate)
- b. Keep meetings brief, use technology to bring members in and send out (streaming)
 - i. Research how to sustain virtual meetings as opportunity to have in person meetings is reestablished.
 - 1. Create best practices for blended meetings.
 - a. Sign in sheets to ensure members are heard during a meeting.
 - 2. Seek solutions that promote efficiency and time management for meetings. (e.g. sending minutes electronically prior to meetings)

APPLICABLE TO	Department/County/Post
REFERRED TO	County Commanders and DEC’s need to push this at County Level
IMPLEMENTATION TIMEFRAME	1 year - all CC and DEC’s should have been to each of their posts to discuss, and reinforce messaging at county meetings.
BUDGET REQUEST	No

9) **Programs**

- a. Request Chairman of Committees conduct inventory for
 - i. Number of applicants for specific programs – broken down by county and posts
 - ii. Number of awards presented and identify any recurring trends (e.g. one county consistently submits and its applicants are selected).
 - iii. To identify upward/downward trend and look at return on investment.
 - 1. May inform program changes
 - 2. May indicate a non-viable program.
- b. Review relevancy of programs, certain ones will be mandated by national.
 - i. Review current programs against return of investment. Diminishing participation and a dearth of applicants indicate a program that is no longer aligned with interests of members and the community. Consider the following course of action:
 - 1. Eliminate the program entirely.
 - 2. Shelve the program indefinitely.
 - 3. Restructure the program (goal is to require less operating resources for the program)
- c. Request incoming committee chairman to conduct a self-audit of program. Share results and recommendations with the leadership team.
 - i. Specific focus for self-audit is to view program in light of societal changes, demographic and newest veteran population.
- d. Technology recommendations (reference items 5-7) will enable better communication of programs through all levels of Department.
- e. Department Commanders and Leading Candidates for Department positions should be pressing Committee and Program leaders to ensure viability of programs, e.g vision statements, deliverables, purpose of the program and how program objectives will be achieved. Committees and Programs that operate in “name only” cause friction and are a draw on limited resources.
- f. **Refer to Department Committees and Awards Appendix - (Appendix Page 60)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department/County/Post
IMPLEMENTATION TIMEFRAME	6-9 months
BUDGET REQUEST	No

10) Programs – Eligibility Criteria

- a. Review eligibility criteria for programs.
 - i. Eligibility for award programs is often narrowly defined.
 - 1. Historically practice has been for descendants of members.
 - ii. Examine feasibility of expanding eligibility as required
 - 1. Provide advantage for members and veterans if eligibility is broadened.
- b. Identify alternative ways to advertise programs and communicate application deadlines etc.
- c. Ensure that Department criteria remains aligned with National guidelines.

APPLICABLE TO	Department/County/Post
REFERRED TO	Revised Legion
IMPLEMENTATION TIMEFRAME	9-18 months
BUDGET REQUEST	No

11) Operations – General

- a. Utilize other Veteran Service Organizations to benchmark
 - i. Internal processes.
 - ii. Programs.
 - iii. Staff hours, duties and responsibilities, etc.
 - iv. Fund raising strategies
- b. Upon completion of Finance Committee review of recommendations and budget requests recommend that Department:
 - i. Identify funded and unfunded recommendations.
 - ii. Identify fundraising strategies to support all recommendations but specifically unfunded but supported recommendations.
 - iii. Budget and fundraising should include sustainment strategies. Intent is to not have recommendation fail in the future because sustainment was not considered.
 - iv. Recharter the finance committee to ensure objectives of the committee are aligned with the Strategy outlined in this report.
 - 1. Ensure members are committed to a wide range of options.
 - 2. The committee should provide a near (1 year), short (2-3 year), and long term (4-5 year) plan for the financial well-being of the Department.
 - 3. Institute qualifications for membership on the committee that encourage the participation of members who have bold and innovative ideas specific to the financial well-being of the Department.
- c. Finance Officer and Dept. Commander and Leading Candidate should discuss as needed. Dept Chain of Command should be in contact with other VSO leadership and have that working relationship to state what did and didn't work for each organization so we can learn from each other.

APPLICABLE TO	Department
REFERRED TO	Department Officers, Revised Legion, Finance Committee
IMPLEMENTATION TIMEFRAME	9-18 months
BUDGET REQUEST	No

12) Operations - Legion Police

- a. The Legion Police are a one of a kind of ceremonial organization. New Jersey is one of the few remaining Departments (if any) to support a Legion Police unit.
 - i. As they are not a Law Enforcement unit. They cannot be asked to provide to provide the level of security a LE officer can provide. If events require that level of security this should be arranged as required, BUT not be a requirement for the Legion Police to fill. Significant legal and liability issues must be considered.

- ii. Currently they are used for Department functions only. Look into broadening their utilization by the Legion family.
- iii. Consider expanding membership into the Legion Police. Review regulations etc. for feasibility. Would expanding membership change the nature of the Legion Police? Could they remain Legion Police as a named organization?
 - 1. Historically members have been recommended by Post and County.
 - 2. Currently a 2-year commitment.
- iv. Establish commitment of Chairman and Revised Legion
- b. Eliminate the Legion Police. Is it a “core” program that requires diversion of resources and members time and commitment, when other viable (“core”) programs need dedicated members to support them? As one of the main purposes is at the Department Convention, replacing them with a group (“Assistant Sergeant at Arms”) which would be a Convention Committee, similar to the purpose of the Credentials Committee.
- c. Budget
 - i. Current budget is \$2,500 a year
 - 1. Budget utilization?
 - ii. Uniforms
 - 1. Members pay for their uniforms for the first year and then reimbursed after the second year.
 - 2. After 2 years those members get ½ of their cost back and then after 4 years would get all of their money back.
 - 3. Some posts will help alleviate the cost.

APPLICABLE TO	Department
REFERRED TO	Legion Police Committee and Revised Legion
IMPLEMENTATION TIMEFRAME	1 year
BUDGET REQUEST	As Budgeted

13) Operations - Department Commander Vehicle

- a. **Removed** – not relevant to the task and purpose of the Ad Hoc Committee. Referred back to Department Revised Legion and Finance Committee.

14) Operations – Create a Marketing Committee

- a. Following the adoption of National Resolution No. 4 creating a National Marketing committee the Department of New Jersey should create a Marketing Committee specific to the needs of the Department of New Jersey.
- b. The Department of NJ Marketing Committee should establish connection with the National Committee and evaluate how National efforts could apply to New Jersey.
- c. The Marketing Committee may advise upon the following recommendations identified in this report:
 - i. INTERNAL – Items 6, 9, 11
 - ii. EXTERNAL – Items 2, 3, 4, 5, 6, 7
- d. **Supported by National Resolution No 4 (2020) – Marketing Committee (Appendix page 51)**

APPLICABLE TO	Department
REFERRED TO	DEC
IMPLEMENTATION TIMEFRAME	Within 6 months of recommendation
BUDGET REQUEST	To be determined – but might be provisioned elsewhere in this report

15) General – Adopt a Vision, Mission, Values and Motto for Department of New Jersey

- a. Following the adoption of National Resolution No. 5 and No. 38 creating a vision, mission and motto for the American Legion the Department of New Jersey should create a vision, mission and motto specific to the needs of the Department of New Jersey.
- b. Establish a campaign to promote both National and Department Vision, Mission, Values and Motto to the Post level.
 - i. Create an incentive program for the campaign.
- c. **Supported by National Resolution No 5 and 38 (2020) – Vision, Mission, Values, Motto (Appendix page 52)**

APPLICABLE TO	Department
REFERRED TO	DEC
IMPLEMENTATION TIMEFRAME	Within 6 months of recommendation
BUDGET REQUEST	None

16) Membership – Process

- a. Green Bar Charts and mailing cards and checks back and forth are last century artifacts and mid last century at that. We urgently need to get away from expensive and slow processes that are not value added. While we do have some posts with non-tech capable leaders for which we still will need hard copy, we could start with whoever can handle it first and move on from there.
 - i. Green Bar Charts - Host it online so that status changes like payments, moves, corrections, etc. are reflected quickly and viewable by all concerned. Posts without tech ability could still get the hard copy but they should be the outliers more and more as time passes. Changes should be made whenever possible via myLegion.org as many posts are already doing.
 - ii. Membership money - both online renewals & PUFLs going TO posts and regular membership renewals FROM posts need to be electronic payments ASAP. Of course, the posts that can't handle e-payments can opt to still get paper checks but saving MONEY and TIME for so many of our small transactions will make us timely and efficient. Some posts have already started sending membership \$'s in by myLegion.org, lets follow that up on checks FROM department as well as continue to train posts in “myLegion” use.
 - iii. Possibly provide a reward or drawing to encourage posts to adopt online processes.

APPLICABLE TO	
REFERRED TO	
IMPLEMENTATION TIMEFRAME	
BUDGET REQUEST	

17) Membership – Membership Analysis

- a. In order to refine a recruitment and retention strategy while simultaneously ascertaining the viability of the Legion Post footprint a membership analysis should be conducted.
 - i. Conduct of the Analysis- The analysis may be facilitated in one of three ways:
 - 1. Conducted by willing members of the Department, or
 - 2. May be promoted as a research project for willing college students, or
 - 3. Hire a professional organization to conduct the analysis, or
 - ii. Goals of the Analysis are to identify the following:
 - 1. Identify 3-5 years trends in membership, renewal and new, for all Posts in New Jersey, compiled into a broad overview of the Department
 - 2. Incorporate war era information for Department membership into the analysis
 - 3. Compare the information in #1 against trends in the veteran population in New Jersey
 - 4. Determine the percentage of a Posts membership that live near the Post location, in New Jersey, or out of state.
 - iii. Methodology

1. Phase 1 – Posts will need to ensure membership information is accurate. Specifically capturing war era and address information. Ensure the Post membership rolls do not contain deceased members.
2. Phase 2 – Upon ascertaining that #1 is completed, pull data from resources in order to begin analysis. Ensure data only contains relevant information to conduct the analysis, e.g. name/contact info are not required for the analysis
3. Phase 3 – Provide analysts with information and the goals for the analysis. Determine delivery date of the analysis.

iv. Objectives of Analysis

1. By using the membership analysis the Department will understand the following:
 - a. Active and Dormant Posts – this can inform the objectives in Item 1 – Legion Footprint
 - b. Hot areas for recruitment and retention – providing insight into the optimum areas to dedicate resources.
2. Example – a Post that has the majority of its membership who may reside in NJ but based on war era may not be as active as in previous years and may have a large number of members not living in New Jersey at all and have not recruited a single new member in years may indicate a Post in decline and not viable. Of course, there are other factors that may influence viability but using this analysis as a baseline of where the American Legion should start looking is an efficient approach.

APPLICABLE TO	
REFERRED TO	
IMPLEMENTATION TIMEFRAME	
BUDGET REQUEST	

18)

18) Open

EXTERNAL TOPICS

EXTERNAL

1) Family

- a. Recruiting a family not an individual
- b. That family could be traditional but also think of the family as the network of service buddies (e.g. word of mouth sells membership)
- c. Promote Legion activities as inclusive of the family – even regular Post meetings can be crafted to have a family tie in.
- d. Maximize the

APPLICABLE TO	Department/County/Post/ALA/SAL/ALR
REFERRED TO	DEC
IMPLEMENTATION TIMEFRAME	Within 1 year of recommendation
BUDGET REQUEST	No

2) Advertising

- a. Broaden Outreach Through Targeted Advertising
- b. Social Media
- c. Conventional Media

APPLICABLE TO	Department/County
REFERRED TO	Dept Adj, With County DEC's, Public Relations Committee
IMPLEMENTATION TIMEFRAME	Within 1 year of recommendation
BUDGET REQUEST	Yes

3) Collaboration

- a. Cooperation with newer VSOs – sharing existing resources with newer organizations to benefit both organizations with brick and mortar resources
- b. Partnership with non-traditional organizations
- c. Establish and support recurring engagement with the New Jersey Veterans Chamber of Commerce. Change perception of the American Legion by concrete action and strong messaging on what the American Legion delivers.
- d. Name recognition – use financial resources to get name out (e.g. join local chamber of commerce, non-profit associations). Local level working its way through County to Department
- e. Identify where members belong to multiple VSOs – emphasize that this is beneficial to all organizations.
- f. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) - Attend Conferences/Conventions of other Organizations (e.g. VFW, AMVETS, AUSA, etc.) (Report page 6)**

APPLICABLE TO	Department/County
REFERRED TO	Dept Commander/Adjutant
IMPLEMENTATION TIMEFRAME	Within 1-2 years of recommendation
BUDGET REQUEST	No

4) Events – Non-Traditional

- a. Hosting competitive events

- i. Spartan Races
- ii. Special Olympics
- iii. Para Sports
- b. Family outings
 - i. Day at the Amusement Park
 - ii. Sports Events etc.
- c. Geocaching <https://www.geocaching.com/play> - tie this to history, legacy of the American Legion
- d. Video Game Contests – look at organizations such as <https://militarygamingleague.com/>
 - i. There is some initial research that video games can have therapeutic effect for disabled veterans - <https://www.militarytimes.com/news/2020/01/24/video-gaming-to-become-newest-medal-event-at-2020-national-veterans-wheelchair-games/>
 - ii. Video gaming is now a medal event at the National Wheelchair Games (VA sponsored) – as of 2020 games.
- e. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) - Community Engagement Opportunities. (Report page 6)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department/County/Post
IMPLEMENTATION TIMEFRAME	Within 1-2 years of recommendation
BUDGET REQUEST	Yes

5) Survey

- a. Internal
- b. External
 - i. Tied to collaboration with other new VSOs – use them to survey
 - ii. Capture their surveys for use
- c. Survey Monkey – tool for surveys
- d. Ask Veterans How They Think the 4 Pillars Should be Delivered
- e. Review results of latest National American Legion surveys – use results to either inform or guide narrower survey specific to New Jersey.
- f. Department needs to create distribution plan of results to County level
- g. Every survey must be accompanied by a plan to analyze and distribute throughout the Department. Without this follow up plan a survey is useless. Further, surveys that do not provide results will eventually receive no support as members will rightly conclude that their time and effort achieve no result.
- h. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) - Targeted Surveys. (Report page 5)**

APPLICABLE TO	Department
REFERRED TO	DEC and Employment, Homeless and Education Committee
IMPLEMENTATION TIMEFRAME	Within 1-2 years of recommendation
BUDGET REQUEST	Yes (but might be free options)

6) Public Relations

- a. Research “outsourcing” of some/all media for the Department, including the
 - i. Newspaper
 - 1. What can be done within the current budget amount? If value can be demonstrated in outsourcing what budget increase is necessary or what savings can be realized.
 - ii. Radio
 - 1. One estimate is \$383 for a 30 second spot.
 - 2. Public Service Announcements (PSAs) are used at the discretion of the on-air person.

- a. Advantage for use of PSAs is if they were former military or member of the Legion, Auxiliary, SAL.
- 3. Most PSAs are for a community event related to a cause.
 - a. So currently fundraisers for food and Personal Protective Equipment (PPE) are getting play. Speaking of fund raisers for PPEs, there's been a lot of stories on the news about groups donating PPE, but I've not seen anything about the Legion doing that. This is what is getting coverage.
 - b. Item 3a indicates the American Legion must be prepared to shift rapidly on to immediate causes and needs and mobilize an engagement to generate exposure and deliver outreach
- b. Attention getting subjects for media – food events (e.g. food drives), healthcare activities, Veteran focused events.
- c. Emphasize existing documents – training on how to do this – refresh step by step. Training POC at Department.
- d. Establish a recurring (permanent) presence at JBMDL.
 - i. Create a standard manning requirement.
 - ii. This is not a specific recruiting effort for a Post, but can connect members with nearby Posts they are interested in joining. Sign up interested members to Post 1000 if necessary but hand off MUST occur to a local Post otherwise retention will be less likely.
 - iii. Coordinate with JBMDL to ensure presence is accepted and members can access JBMDL to perform duties. Work on best location for activities (e.g base exchange)
 - iv. Ensure the presence represents the demographic we are targeting.
 - v. Establish a set number of days that the American Legion will be present. Promote sign up across the Department, with some incentive/stipend to attend (e.g. mileage to and from location).
- e. Engage locally with VA CBOCs to establish a presence at these locations.
- f. Work with DMAVA service officers to establish connectivity at their offices to promote the American Legion.
- g. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Addendum (Report pages 11-14)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department/County/Post Leadership
IMPLEMENTATION TIMEFRAME	Within 1-2 years of recommendation
BUDGET REQUEST	Yes

7) Outreach Tools

- a. PTSD Monthly CEs, Mobile Mental Health Guide
- b. Mobile Device Guide – part of outreach highlighting tools available
- c. List of Phone Apps for Veterans – Include in broader campaign of outreach – tools available.
- d. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) - Dissemination of Membership Impact Report/Dispatch. (Report page 4)**

APPLICABLE TO	Department
REFERRED TO	Department Adjutant, Department Service Officer
IMPLEMENTATION TIMEFRAME	Within 1 year of recommendation
BUDGET REQUEST	No

8) Membership

- a. Seek guidance from National and if necessary, recommend that there be a “trigger” to inform locally of a member who joined via DMS (Post 1000) in your local area. This would be a proactive approach to assist

Posts in connecting with “new” members who might not be aware of local activity AND for those Posts to share their story.

- b. Currently the approach is a “pull” not a “push” method. With access to myLegion.org you can generate lists based on Post 1000 members filtered by zip code. This is a good tool however seeking faster notification of a new member in the area who signed up Nationally. Capitalize on their moment of motivation in joining by tying it to local Post.
- c. Basic Membership Training online at Department level – similar to the National Basic Training course.
 - i. Build of National Membership resources
- d. College Veterans - We are totally missing an opportunity with College vets. Prior suggestions to target this population have resulted in deferral to Counties/Posts to implement.
 - i. Here is the OPPORTUNITY: All colleges now have a veteran's coordinator and most have a Vets Organization on campus. This should be fertile ground for us to recruit but it is being left to posts and/or counties and IT IS NOT WORKING.
 - ii. Currently the recommendation is for the student vets to join a post where they live or the local posts where the college is located. Recommend that we AT MINIMUM make a concerted effort at dept level to go in and recruit to a recommended nearby post. Even better would be to charter specific College posts at the largest institutions to start with - think Rutgers New Brunswick, NJIT/Rutgers Newark, Montclair State, Drew/FDU Florham, etc. with some sort of subsidized dues structure to get them INTO THE LEGION. There are multitudes of smaller schools including the Community Colleges and we certainly can't establish posts at all of them but Department could still spearhead outreach AND provide dues incentives along with recommended posts for those students.
- e. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Joining Online. (Report page 5)**
- f. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Membership Retention. (Report page 5)**
- g. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Member Buddy Check. (Report page 5)**
- h. **Supported by 21st Century Ad-Hoc Committee Final Report (October 2019) – Military Transition Centers. (Report page 5)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department/County/Post – Membership Chairman
IMPLEMENTATION TIMEFRAME	Within 1 year of recommendation
BUDGET REQUEST	No

9) Membership – Outreach Training

- a. Mobile Training Team for North, Central, South New Jersey to supplement Legion College.
 - i. One day seminar.
 - ii. Laptops are required.
 - iii. Space with internet connectivity for up to 25 students is a requirement.
 - iv. Intent is to execute this in 2020. Capture lessons learned to build a program which could supplement and sustain skills taught at Legion College.

APPLICABLE TO	Department/County/Post
REFERRED TO	Department/County/Post – Membership Chairman
IMPLEMENTATION TIMEFRAME	Immediately
BUDGET REQUEST	No

10) Outreach – Direct Assistance to Veterans

- a. Create a streamlined application process to provide direct emergency support to qualified Veterans within 24 hours of an approved request.
- b. The Veteran should be able to apply by phone/email – the intent is to quickly ascertain need and provide financial support immediately.
- c. Recommend that the annual Commander’s project dedicate a portion of fund-raising proceeds to replenish this budget line item as required.
- d. Examine revising Veteran Assistance Fund policy from 2019.
- e. Formalize and resource as a **core program** the Department’s highly successful homeless outreach program.
 - i. Formalize supporting structures in North and South New Jersey, to include an operating committee for each zone.
 - ii. Establish budgets and accounts for each zone.
 - iii. Enable assistance to be provided by each zone using the VAF fund described in the Appendix.
- f. **Supported by Veterans Assistance Fund New Jersey (Appendix Page 59)**

APPLICABLE TO	Department/County/Post
REFERRED TO	Department Finance Officer/Department Service Officer/Employment, Homeless and Education Committee
IMPLEMENTATION TIMEFRAME	Immediately
BUDGET REQUEST	Yes – Budget Line Item Already Exists

APPENDIX

