



Auxiliary Officer Training

April 2025



General Duties & Responsibilities of ALL Auxiliary Officers

GENERAL DUTIES AND RESPONSIBILITIES OF ALL AUXILIARY OFFICERS

Members are elected to serve in the respective offices of the Auxiliary because the membership has confidence in these individuals – confidence in their ability to direct the various activities – and confidence in their integrity. If you are an officer, you are most anxious to fulfill the trust that has been placed in you.

The Rules and Regulations for the Government of Ladies Auxiliaries, the Ritual, and the operating By-Laws of the Auxiliary are the “guide post” by which the officers should be directed in the conduct of their various duties.

Each officer has her own specific duties and if these are performed as they should be, and in cooperation with the efforts of every other officer, the Auxiliary will have every right to be proud and pleased with the officers elected.

First, the officers meetings are designed to lay plans for future programs. The officers do not transact any business, nor spend any of the funds of the Auxiliary. All officers are expected to attend the officers meetings and be prepared to actively participate in a discussion of the suggested programs and present constructive ideas for advancing the welfare of the Auxiliary. By “pooling” these suggestions, the officers can then recommend projects to the Auxiliary for consideration and final action.

GENERAL DUTIES AND RESPONSIBILITIES OF ALL AUXILIARY OFFICERS

It is the duty of each officer to attend all meetings, regular, special and officers meetings. She should not be absent unless she has a good excuse, and if an officer finds she cannot be present for a particular meeting, she should promptly notify the Madam President and/or Madam Secretary.

The Ritual is to be spoken, not read. Therefore, each officer should memorize her part as soon after installation as possible. She should be thoroughly acquainted with the duties of her office, but should be careful not to infringe upon the duties of any other officer.

Each officer should be well informed on all programs of the Auxiliary and the manner in which they are to be conducted so that she can intelligently discuss them with anyone who requests information. It is the responsibility of the officers to direct the activities in such a manner that a spirit of harmony and cooperation prevails.

Well-organized business meetings will do much to encourage attendance at the regular meetings. Meetings should always open promptly at the designated hour. It is the responsibility of the Madam President to conduct the meetings; however, it is the duty of every officer to be prompt and be present when the meeting opens. It is also the duty of each one to do her part to assist in the conduct of a well-organized business session.

Last the officers are the leaders of the Auxiliary. They represent the membership and should conduct themselves at all times with dignity. They should also be friendly in manner, treating all members alike.

If for any reason an officer does not complete her term, she does not receive credit for that office.



Jr. Past Madam President

JUNIOR PAST MADAM PRESIDENT

1. The retiring Madam President serves as the Jr. Past Madam President by virtue of serving as Madam President.
2. You shall aid the Madam President and share your knowledge; please remember you are there to help by virtue of your experience.
3. The Jr. Past Madam President shall not hold any other office in the Auxiliary but may resign from office if elected to another office in the Auxiliary.
4. In the absence of the Madam President and the Madam Vice-President, the Junior Past Madam President shall preside.
5. The serving Junior Past Madam President, is not included among the officers who are required to hold and attend officers' meetings.
6. May attend the officers' meeting, but shall have no voice or vote in such meeting unless called upon by the Madam President who is authorized to preside at the officers' meeting.



Madam President

MADAM PRESIDENT

PRIOR TO INSTALLATION

- 1.** Choose your installing officers Madam President, who must be a Past President or a 10 year Secretary, Madam Conductor, Madam Inside Guard/Chairman and a Madam Secretary.
- 2.** Make a list of committees and the persons you intend to appoint. Check with each individual to be sure they will accept the appointment.
- 3.** Meet with the current Madam President, Madam Secretary, Madam Treasurer and Auditor to make sure the books and funds are in order before you take office. You should have a working knowledge of the books and all that goes on in the Auxiliary.
- 4.** Choose your Auditor
- 5.** Announce your committees to the meeting attendees under new business.
- 6.** Read the Ladies Auxiliary Rules & Regulations, Auxiliary Officer Handbook & Ritual

MADAM PRESIDENT CONTINUED

DUTIES

1. Presides at all regular, special & Officers meetings.
2. Enforce all the Laws of the Order
3. Maintain harmony in the Auxiliary.
4. General Supervision over all the affairs of the Auxiliary, except where vested elsewhere.
 - a. Secretary, Trustees, & Treasurer
5. Appoint all Officers pro – tem in the places of absentees.
 - a. Fill all vacancies in accordance with the Rules & Regulations
 - b. Check Auxiliary By-Laws to see which Officers are elected or appointed.
6. Shall see that all Officers required to be bonded by the Laws of the Order are so bonded.
7. Shall see that the Auxiliary Auditor audits the records.
8. Shall see that all Auxiliary funds are properly deposited and credited to the funds prescribed by the Laws of the Order.

MADAM PRESIDENT CONTINUED

- 9.** Sign all checks drawn by the Madam Secretary which have been voted by the Auxiliary, and all other papers and documents that may require her signature.
- 10.** Shall see to it that a properly signed affiliation agreement is filed with the Local and Grand Aerie.
- 11.** Must sign the minutes of all Official Auxiliary meetings.
- 12.** Ensure that a minimum of two (2) meetings are held each month.
 - a.** By-Laws dictate time and place.
 - b.** Cannot cancel a meeting, must reschedule it.
 - c.** Each Aerie/Auxiliary shall conduct a joint officers meeting at least quarterly.
 - d.** Special meetings:
 - (1)** President may call
 - (2)** At least 10 members may request one, in writing
 - (3)** No business may be transacted except as stated in the notice of the meeting.
 - (4)** At least five (5) days notice shall be given to the members.
 - (5)** Voting may only take place if it is stated in the notice that voting will take place and only on the business stated in the notice.

MADAM PRESIDENT CONTINUED

- 13.** Ensure that an officers' meeting be held at least two (2) times a month. No formal actions can be taken or expenditures of Aerie/Auxiliary funds.
- 14.** Appoints for such purposes and on such occasions as deemed necessary or advisable all committees of the Auxiliary together with such other committees that shall be required by the Laws of the Order or the By- Laws of the Auxiliary.
 - a.** you do not serve as a member "Ex-officio" of any committee of the Auxiliary. "Ex-Officio" means by virtue of your office, you do not automatically serve on a committee.
 - b.** You have the authority to change any committee appointment during your term unless otherwise stated in the Rules & Regulations.

15. Committee Appointments required by the Rules & Regulations

a. VISITING COMMITTEE

1. You may appoint as many members as you see fit. It will be their responsibility to visit the sick and bereaved and report to the Auxiliary at the next regular meeting.

MADAM PRESIDENT CONTINUED

Committee Appointments required by the Rules & Regulations Continued

b. MEMBERSHIP COMMITTEE

1. Shall consist of four or more members.
2. You will need a Membership Chairman, Reenrollment Chairman, no Goose Egg Chairman and a Net Gain Chairman.
3. The Membership Chairman shall be the committee coordinator.
4. The Committee will serve for a term of one year or until successors are appointed.
5. The duties of the committee are to develop programs to vitalize, strengthen, and improve membership.

MADAM PRESIDENT CONTINUED

Committee Appointments required by the Rules & Regulations Continued

c. MEMBERSHIP SECURITY COMMITTEE

1. Shall consist of three or more members
2. Shall serve for a term of one year or until their successors are appointed
3. Shall secure a list of delinquent members from the Madam Secretary.

d. CONCILIATION COMMITTEE

1. Shall consist of five members, all of who shall be Past Madam Presidents of the Auxiliary, If available and will serve during your term of Office.
2. The purpose of the committee is to provide a means for resolving disputes between members of the Auxiliary.

RECOMMENDED FORM

REPORT OF DISPUTE TO THE CONCILIATION COMMITTEE (Section 20.5)

This form should be used to refer a dispute to the Madam President

I, _____, a member in good standing of Auxiliary No. _____, _____, _____,
City State/Province

Fraternal Order of Eagles, am filing this report against _____, who is a member of the Fraternal Order of Eagles, Auxiliary No. _____, for the
following matter, which occurred on _____, 20____, at approximately _____AM/PM.

The nature of the dispute is: _____

Section 20.5 After a dispute is referred to the Madam President, she shall refer the matter to the Conciliation Committee, who shall set a date for the parties to informally meet with the
Committee to attempt to resolve the dispute. If no resolution is reached, and if a formal written Complaint has been filed, then, that Complaint shall be given directly to the Aerie Secretary
for the processing under Section 63.1 – 63.11 of the Statutes of the FOE. The accuser then become responsible for the payment of the filing fee, per Section 63.1 (b), Statutes.

Date: _____, 20____. _____
Auxiliary Member

Witness (optional) Aerie/Auxiliary No.

Witness (optional) Aerie/Auxiliary No.

**RECOMMENDED FORM
CONCILIATION DISPUTE RESOLUTION**

Under Section 20.5, Ladies Auxiliary Rules and Regulations, the Madam President referred the dispute to the Conciliation Committee on _____, 20_____.

The Committee met informally with both parties on _____, 20_____.

CONCILIATION RESULTS

Contact(s) with _____ Date(s): _____
(Party One)

Comments _____

Contact(s) with _____ Date(s): _____
(Party Two)

Comments _____

As a result of the conciliation, the parties have agreed to:

- ☐ 1. Settle the dispute, as follows: _____
- ☐ 2. Dismiss the dispute.
- ☐ 3. No resolution reached. A formal written Complaint has been filed directly with the Aerie Secretary for processing under Section 63.1 – 63.11 of the Statutes of the F.O.E. The Accuser is responsible for the payment of the filing fee, per Section 63.1 (b), Statutes.

Signature (Party One)

Signature (Party Two)

Dated: _____, 20 _____

CONCILIATION COMMITTEE:

Member

Member

Member

Member

MADAM PRESIDENT CONTINUED

Committee Appointments required by the Rules & Regulations Continued

e. FINANCE COMMITTEE

1. Shall be made up of three members.
2. Shall serve for one year or until their successors are appointed
3. Prior to each meeting they must examine all bills, pass on their validity and correctness, and recommend to the Auxiliary for their payment or rejection.
4. Bills are to be given to the Madam Secretary to bring to the Auxiliary floor for final action.

f. PUBLICITY COMMITTEE

1. Shall have up to three members
2. shall serve for one year
3. Assure that favorable publicity regarding functions and activities is provided to the community through whatever means of communication are available.

MADAM PRESIDENT CONTINUED

Committee Appointments required by the Rules & Regulations Continued

g. INTERVIEWING COMMITTEE

- 1.** Shall consist of three members
- 2.** Shall serve for the fraternal year in which they are appointed and or until their successors are appointed
- 3.** A majority of the members of the committee will constitute a quorum for a report.
- 4.** It shall be their duty to personally interview all applicants for membership within 60 days after her application has first been read at a meeting of the Auxiliary to determine their eligibility and qualifications for membership.

MADAM PRESIDENT CONTINUED

Committee Appointments required by the Rules & Regulations Continued

h. MEETING ATTENDANCE COMMITTEE

1. There are no set number of members to serve on this committee.
2. Committee should develop programs to encourage greater attendance at Auxiliary meetings. All programs must be reported & approved by the Auxiliary.

i. AUDITOR

1. Appoint your Auditor immediately after installation.
2. May be a qualified member of any Auxiliary or Aerie
3. No bonded Officer of the Auxiliary may be appointed as the Auditor.



Madam Vice-President

MADAM VICE PRESIDENT

DUTIES

1. Shall assist the Madam President in preserving order and decorum in the Auxiliary.
2. Shall in conjunction with the Madam President, inspect all ballots on applications and report to the Auxiliary.
3. She shall preside in the absence of the Madam President and perform all other duties required of her by the Laws of the Order. In the absence of the Madam President and the Madam Vice-President, the Junior Past Madam President shall preside and, in the absence of all of the above named, Past Madam Presidents in good standing and who are in attendance at such meeting shall preside according to the order of the most recent term of service. In the absence of the above mentioned, the highest-ranking officer shall preside.
4. The Madam Vice-President shall have her name on the bank accounts to sign checks in the absence or inability of any of the prescribed officers.
5. If a vacancy occurs in the Office of the Madam President, the Madam Vice President must succeed to the office of Madam President and the office of Madam Vice President shall be declared vacant.
6. The office of Madam Vice President must always be filled by election.
7. When a vacancy occurs in the office of Madam President the Madam Vice President, must succeed to that office. If she refuses to do so, then she must give up her office of Madam Vice President and both offices are declared vacant.



Madam Chaplain

MADAM CHAPLAIN

DUTIES

- 1.** Shall have charge of the devotional exercises of the Auxiliary in accordance with the Ritual.
- 2.** Shall assists the Madam Conductor with inspecting the official receipts and make sure they are up to date and signed.



Madam Conductor

CONDUCTOR

- 1.** Sets up the Meeting Room per the Ritual.
- 2.** Shall ensure all those present in the meeting are members in good standing. Official receipts must be up to date and signed.
- 3.** Prepares the ballot box for election of candidates and supervises the voting.
- 4.** Introduces all visitors and conducts them to their seats.
- 5.** Has custody of all Ritual paraphernalia.
- 6.** Shall perform such other duties as required of her by the President and/or by the Laws of the Order.
- 7.** Assist in the initiation of the candidates.



Madam Secretary

SECRETARY

DUTIES

- 1.** Keep a full and complete record of the proceedings of the Auxiliary in a book provided for that purpose by the Grand Aerie or if the records are kept electronically, they shall be printed and read at each meeting and, once approved by the membership and signed by the Madam President and Secretary, copies shall be kept and protected in a three (3) ring binder or book for that purpose.
- 2.** Shall read in the meetings all Auxiliary communications. All official communications received from the Grand Aerie, shall be read in their entirety unless otherwise specifically directed.
- 3.** Shall write all communications, fill out all certificates and cards granted by the Auxiliary.
- 4.** Shall maintain at all times a full, complete and up-to-date roster of the Membership, Committees and Officers of the Auxiliary, as required by the Membership Management System (MMS) with the latest up-to-date residence, mailing address, phone or cell numbers and email address.
- 5.** Shall notify the Grand Secretary forthwith of the expulsion by the Trial Committee of any member or Officer removed from office.

6. Shall maintain such systems of records, books and accounts, and shall issue such notices and make such reports as the Grand Aerie shall prescribe.
7. Provide a delinquent list of members to the Membership Security Committee Board, dues expire on May 31st.
8. The mailing list or roster is an official record of the Local Auxiliary for which the Madam Secretary is responsible. Every member whose name is on the roster list of the Local Auxiliary is entitled to full protection from any misuse of such roster list. Neither the Madam Secretary nor any other officer of the Local Auxiliary may use or authorize the use of the Auxiliary roster list. NAMES AND PHONE NUMBERS ONLY may be given for official Auxiliary business.
9. If the Auxiliary has an office in the Aerie Home and it is an office shared by the Auxiliary officers, the Auxiliary membership controls who is to have a key to that office.
If the office is under the control of the Secretary, she controls who has keys to the office, with the exception that a key must be given to the Aerie Trustees for security and emergency purposes only.
10. The Local Auxiliary's current By-Laws shall be posted at all times on the Auxiliary Bulletin Board, so they are available to all members of the Auxiliary to read.

- 11.** The Madam Secretary shall segregate and enter amounts of all monies received upon her records to the credit of the respective funds of the Auxiliary, as required by the Laws of the Order, and shall pay such money to the Madam Treasurer at the close of each meeting, or on the succeeding day and demand the signature of the Madam Treasurer in the Secretary's Cash Book, for money received by the Madam Treasurer.
- 12.** The Madam Secretary shall demand, receive and immediately receipt for all money and/or property belonging to the Auxiliary and receive from every source, including any committee, Marching Club, Degree or Drill Team or other Internal Unit.
- 13.** May appoint an assistant to efficiently carry on the duties of her office. The assistants so appointed shall give bond for the faithful performance of such duties, the premiums to be paid for by the Auxiliary. The Secretary shall also be responsible for her bond, for the faithful performance of the duties assigned to such assistants. The assistants' compensation shall be paid by regular Auxiliary check from the treasury of the Auxiliary if compensation is provided for in the By-Laws of the Local Auxiliary, and in that event, the compensation to the assistant shall not be charged against, and regularly deducted from, the compensation of the Secretary. **No compensation shall be paid to the assistant unless specifically stated in the Auxiliary By-Laws.**
- 14.** Shall read at every meeting:

 - a. An itemized account of the receipts to and the disbursements from each fund of the Auxiliary since the last regular meeting.
 - b. At the last regular meeting of each month she shall read an itemized list of all, approved unpaid bills of the Auxiliary on hand, and the date such bills were due and payable.

- 15.** Shall, on request, deliver all books, papers and property of the Auxiliary to the Auditor or to such officer or officers as the Grand Worthy President or the Grand Secretary shall direct.
- 16.** Shall receive compensation for the performance of her duties as may be prescribed by the By-Laws of the Auxiliary.
- a) Such compensation shall be a per-capita compensation
 - b) Shall be based upon the number of members who are in good standing or who are not more than (1) month in arrears.
 - c) Shall not be paid until all required reports have been completed and transmitted.

17. Temporary Receipts - to immediately acknowledge receipt of dues and application fees.



Miscellaneous Receipts - a duplicate carbon receipt for all other monies received

- original to be given to the person you received money from
- Receipts are in numerical order.

Both receipts provided by the Grand Aerie.

NOT VALID if written with ordinary lead pencil. This receipt must be made in duplicate and written with "Stylus" or indelible pencil.

FUND _____ MISCELLANEOUS RECEIPT No. 009

 **FRATERNAL ORDER OF EAGLES** 

City _____ State _____ Month _____ 19____

RECEIVED from _____

The sum of _____ Dollars

in payment for _____

Entered in Cash Book Page _____ (AERIE/AUX. SEAL) Secretary Aerie/Aux. No. _____



\$ _____

Duplicate (Yellow Copy) Must Not Be Detached.

Printed in U.S.A.

NOT VALID if written with ordinary lead pencil. This receipt must be made in duplicate and written with "Stylus" or indelible pencil.

FUND _____ MISCELLANEOUS RECEIPT No. 010

 **FRATERNAL ORDER OF EAGLES** 

City _____ State _____ Month _____ 19____

RECEIVED from _____

The sum of _____ Dollars

in payment for _____

Entered in Cash Book Page _____ (AERIE/AUX. SEAL) Secretary Aerie/Aux. No. _____

\$ _____

18. DISTRIBUTION OF RECEIPT FORMS

- a) Can be obtained from the Grand Aerie Supply Department.
- b) A valuable tool for making the turnover of money to the Treasurer and making your report to the membership.
- c) Not to be used as a receipt from the Treasurer.
- d) Indicates how your deposits are made to the different funds.
- e) Perforated for tearing off part for the Treasurer.

FROM OFFICIAL RECEIPT RECORD	BENEFIT FUND				GENERAL FUND				SOCIAL FUND				BUILD. MAIN. FUND			
Dues																
Initiations																
Insurance																
Social Rooms																
Rents																
TOTAL																

TOTAL DISTRIBUTION OF RECEIPTS

Date _____ 20____

Benefit Fund					
General Fund					
Social Fund					
Building & Maintenance Fund					
TOTAL AM'T PAID TO TREAS.					

TOTAL DISTRIBUTION OF RECEIPTS
(FOR TREASURER)

Date _____ 20____

Benefit Fund					
General Fund					
Social Fund					
Building & Maintenance Fund					
TOTAL AM'T PAID TO TREAS.					

19. SECRETARY'S MINUTE BOOK

1. Secretary's must keep a complete and full record of the proceedings of the Auxiliary.
2. DO NOT attempt to write out completed minutes of the meeting during the meeting. Take notes and/or record the meeting.
3. A Local Auxiliary may, by a proper By-Law, prohibit the tape recording of any of its meetings other than that done by the Secretary or designated recorder for those proceedings or meetings. Opinion No. 703.
4. Create an outline of standard minutes required so you have it available for each meeting:
 - a) Roll Call of Officers
 - b) Reading of the Minutes of the previous meeting
 - c) Treasurer's Report
 - d) Old Business
 - e) New Business
 - f) Reading of new applicants
 - g) Reading of re-enrolled applicants
 - h) Etc.

5. Minutes can be typed and glued to the Secretary's minute book pages or maintained in a Applicant's binder.
6. It is VERY important to include the following in the Minutes book:
 - a) Visiting Members
 - b) Officers absent and if they were excused
 - c) Applications received for New/Reenrolls/Dual/Transfer
 - d) Applicant's names voted upon
 - e) Applicant's names that were rejected
 - f) Applicant's names who were initiated
 - g) Members on the sick list
 - h) Short resume on all communications received and read
 - i) Action taken on reports of all committees
 - j) Excuses of absentees
 - k) Old Business – Motions, etc.
 - l) New Business – Motions, etc.
 - m) Good of the Order

20. SECRETARY'S MINUTE BOOK PART 2

1. Part two of the minute books is a record of all Special Committees.
2. Part three is for a record of all Standing Committees.
3. Part four is for recording attendance of all Officers.
4. Fraternal and Fiscal Year – June 1st to May 31st.
5. There are 2 authorized funds:
 - a) General Fund
 - b) Benefit Fund
 - c) Local Auxiliaries may, by their By-Laws, provide for special funds for any purpose not prohibited by the Laws of the Order, upon obtaining the approval of the Grand Aerie Financial Advisor.

The Secretary Cash Book is available through the Grand Aerie Supply Department or you may use the Quicken Quickbooks or similar program.

SECRETARY'S CASH BOOK Part 1

ONE PAGE OR MORE CAN BE USED FOR EACH MEETING. DO NOT PUT TWO MEETINGS ON ONE PAGE

SIGNATURE OF TREASURER

21. a

Distribution of Receipts of Each Meeting for Quarterly Audits and

① - a

[illegible]

22. Secretary's Annual Report – Per Capita Tax

1. Each Local Auxiliary shall pay to the Grand Aerie an annual Per Capita Tax of **twenty (\$20.00)**.
2. Invoice will appear on the Membership Management System home page
3. Paid from the Benefit Fund
4. Due and payable by June 1st. It becomes delinquent on July 1st.

23. Sample of Local
Auxiliary Per-Capita
Tax Statement



PerCapita Tax
Period Ending 05/31/2020

Auxiliary 423
320 SYCAMORE ST
WASHINGTON COURT HOUSE, OH 43160-2070

Grand Aerie, FOE
Attn: Accounts Receivable Department
1623 Gateway Circle South
Grove City , OH 43123

Activity Date	Invoice	Description	Quantity	Amount
05/31/2020	P416844	Invoice - Initiated Members	177	\$2,124.00
05/31/2020	P416844	Adjustment for Police & Fire Members	0	0.00
Invoice Total:				\$2,124.00

The Per Capita Tax is based on the actual count of active members as of the end of the Per Capita reporting period. Please send a copy of this invoice back to the Grand Aerie with your payment. Thank you for your cooperation and prompt payment.

DUE June 1, LATE AFTER July 1
MUST BE PAID FOR DELEGATES TO CARRY VOTES TO
INTERNATIONAL CONVENTION

24. Sample of State
Auxiliary Per-Capita
Tax Statement



JULIE A KASSNER
STATE/PROVINCIAL SECRETARY
620 E SLOCUM ST
WHITEHALL, MI 49461-1132

PerCapita Tax

Period Ending 05/31/2024

State/Province PCT Invoice

AUXILIARY 3734 MASON-HOLT
325 RANDOLPH ST
C/O HEATHER DUNIVON
MASON, MI 48854

This invoice was created on 05/31/2024 and will be visible for the entire Fraternal Year **whether it has been paid or not**. Please check your records or with your State/Provincial Secretary before sending funds to avoid duplicate payments.

Activity Date	Invoice	Description	Yearly PCT	Quantity	Amount
05/31/2024	441694	Invoice - Grand Aerie Initiated Members	\$2.00	366 *	732.00
05/31/2024	441694	Adjustment - Police & Fire Members	(\$2.00)	0	0.00
Invoice Sub-Total:					732.00
Write-in Total for Dual Members \$2.00 Each: (If required by the State/Province)					_____
Total Amount:					_____

* This number does not include Dual Members

This invoice is based on a whole year. If your state still prefers to receive Per Cap on a semi-annual basis, you will have to contact your State/Provincial Secretary for the proper amount.

DUE DATE FOR PAYMENT IS IN ACCORDANCE WITH STATE OR PROVINCIAL
BY-LAWS

Please make check payable to the "MI STATE AUXILIARY " and Mail to:

JULIE A KASSNER
STATE/PROVINCIAL SECRETARY
620 E SLOCUM ST
WHITEHALL, MI 49461-1132

DO NOT SEND TO THE GRAND AERIE

25. Delinquent Members and Dues Reminders

- a. Members are considered delinquent as of June 1st.
- b. A Delinquent Member Report is available in the Membership Management System.
- c. Dues Reminders will be sent by the Grand Aerie.

26. Report of Applications

- a. Applications for membership shall be entered into the MMS System before the next regularly scheduled meeting.
- b. An Initiation/Re-enrollment Report is available in the MMS System.

27. Notice of Election to Membership

- a. Must appear for interview within 60 day of notice
- b. Has a period of six (6) months to appear for Initiation
 - i. If they do not appear, they forfeit all fees paid.
 - ii. Application for membership is cancelled.

28. Report of Officers to the Grand Aerie

- a. The Secretary is required to enter all Officers and required Committees in the Membership Management System.

29. MEMBERSHIP MANAGEMENT SYSTEM (MMS)

The Membership Management System is used to assist the Local Secretaries with their day-to-day duties. With MMS, the Secretary has the ability to maintain membership records, print dues receipts, run specific reports pertaining to membership, finances, etc., print Accounting statements, check their status with the Compliance Department, create postcards, send mass e-mails to their membership, update the Officer List and much more.

The link to access the Membership Management System (MMS) is <https://mms.foe.com>

In order to access the system, you will need to have a username and password which can be obtained by sending an e-mail to mmshelp@foe.com.



MEMBER MANAGEMENT SYSTEM
THE FRATERNAL ORDER OF EAGLES

User Sign-On

User ID:

Password:

Login

If you have forgotten your password, enter your User ID above and click the "Forget Password?" button below.
Your password will be emailed to you.

Forget Password?

If you need credentials to log into MMS,
contact MMS Help at
mmshelp@foe.com or 614-883-2177.

31. New and Re-enrolled Membership Applications

1. Every application for membership shall be recommended by two (2) members in good standing.
2. Initiation/Re-enrollment Fee is to be determined by the By-Laws.
3. \$10.00 of the Application Fee is to be sent to the Grand Aerie.
 - a. The Grand Aerie will keep \$6.00. \$4.00 will be forwarded to the State.
1. Dues shall be determined by the By-Laws but can be no less than the amount equal to the Grand Aerie Per Capita Tax plus State Per Capita Tax and any fees and/or assessments.
2. All applicants must be interviewed, voted upon and Initiated with the exception of re-enrollments as they are not required to go through the Initiation process again.

The Eagles offers Countless Benefits

FOR MEMBERS TO ENJOY YEAR ROUND

Join today for access to a growing slate of benefits designed to add value to your membership and keep money in your pocket.

Members in good standing receive protection through our Memorial Foundation, which provides medical and educational benefits to children of Eagles who lose their lives while at work or serving their country.

Eagles ages 55-and-up with at least 10 years of membership have the option of spending their days at Eagle Village, an exclusive living community in beautiful Bradenton, Florida, with a library, recreation center, pool, and three-acre lake.

See what we have to offer at foe.com

INITIATION PROCEDURE

All applicants for membership are required to go through the full Auxiliary Ritual in order to be considered a member in good standing of the Fraternal Order of Eagles.

Failure to go through the full Ritual ceremony can result in the nullification of your membership and/or denial of benefits including protection through the Memorial Foundation.

If your Auxiliary does not put you through the full Ritual ceremony, please request that they do so in order to ensure your full membership as an Eagle.

Thank you!

For more details visit
www.foe.com

CERTIFICATION OF MEMBERSHIP

I hereby certify that I profess to be of good moral character, and believe in the existence of a Supreme Being, I am not a member in any other Aerie or Auxiliary within the Order (unless applying for dual or transfer membership), I am over twenty-one (21) years of age, unless the By-Laws of this Local Aerie allow for those between the age of eighteen (18) and twenty-one (21) years of age to apply, I am not in any way connected or affiliated with the Communist Party, or believe in or advocate the overthrow of the government of this country by force or violence. I understand that the use of the social quarters of any Aerie of the F.O.E. shall be in conformity with the House Rules of that Aerie. I understand that my membership in this Auxiliary is conditioned on a favorable vote of the membership, and if rejected, I cannot apply for membership in any Aerie or Auxiliary until twelve (12) months have passed.

I certify that the information I have provided is true and that no omission or concealment of information has been made of any fact or circumstance. I freely and without reservation accept and honor this Certification of Membership.

Please answer the following questions:

*I have been rejected for membership in an Aerie or Auxiliary:

☐ Yes ☐ No If yes, date: ____/____/____

*I was previously a member of an FOE Aerie. ☐ Yes ☐ No

*If yes, I have resigned my Aerie membership and waited 12 months before applying for Auxiliary Membership. ☐ Yes ☐ No

*I am a convicted felon: ☐ Yes ☐ No

*(WI, HI and Canada excluded on this question)

*I am a registered sex offender: ☐ Yes ☐ No

_____, ____/____/____
Signature Date

Printed Name

TO BE COMPLETED BY THE AUXILIARY SECRETARY

Application submitted on ____/____/____

Elected to membership on ____/____/____

Initiated on ____/____/____

Rejected for membership on ____/____/____

Secretary Signature



Auxiliary Membership Application

PEOPLE HELPING PEOPLE

APPLICATION TYPE: ☐ NEW ☐ RE-ENROLL ☐ DUAL APPLICANT ☐ TRANSFER

FORMER/CURRENT AUXILIARY NAME & NUMBER: _____ (RE-ENROLLED, DUAL AND TRANSFER)

AUXILIARY
APPLICANT INFORMATION

Please Print | ALL Information Must be Completed

Name: _____
First M.I. Last

Mailing Address : _____

City: _____

St. /Prov. : _____ Zip: _____

Date of Birth: _____/_____/_____

Home Phone: _____-_____-_____

Cell Phone: _____-_____-_____

Email: _____

Occupation: _____

Marital Status: ☐ Married ☐ Single

Spouse's Name: _____

Number of Children under 21 years of age: _____

Dual/Transfer Applicant Information:

GAID # _____ Aerie # _____

I Qualify for Membership under the Those Who Serve
Program: ☐ YES ☐ NO

AUXILIARY
RE-ENROLLED MEMBER INFORMATION

I understand and acknowledge that by re-enrolling in the
Fraternal Order of Eagles, I may lose all prior years of membership
in the Fraternity, which may affect my qualifications for Life
Membership, Golden Age Eagle and for residence in Eagle Village.
(Must be signed by re-enroll applicant)

Signature of Re-Enrollee

NEW, RE-ENROLLED,
DUAL & TRANSFER APPLICANTS:

Be sure to sign the statement on the other side
of this application

PROPOSERS INFORMATION*

*ALL New and Re-Enroll Applicants must be proposed by two (2)
Auxiliary Members of the Order in Good Standing.
ALL information must be completed below.

1st Proposer:

Name: _____
First M.I. Last

Address: _____

City: _____ St. /Prov. : _____ Zip: _____

GAID #: _____

Signature: _____

2nd Proposer:

Name: _____
First M.I. Last

Address: _____

City: _____ St. /Prov. : _____ Zip: _____

GAID #: _____

Signature: _____

We, the Interviewing Committee have interviewed the above
named applicant on _____/_____/_____

Committee Members Signature(s):

THANK YOU!

WHO WE ARE

The Fraternal Order of Eagles is an international non-
profit organization dedicated to philanthropic and service
efforts which shape communities across the United States
and Canada. Since 1898, the Eagles have been responsible
for the creation of Mother's Day and the protection of
senior citizens through the Social Security program.

Our nearly 800,000 members have donated hundreds of
millions of dollars to various organizations through the
F.O.E. Charity Foundation, which houses a variety of funds
dedicated to patient care and research for causes including
cancer, heart disease, kidney disease, spinal cord injuries,
pediatric ailments and more.

Our latest achievement, the Fraternal Order of Eagles
Diabetes Research Center at the University of Iowa,
opened its doors in 2014 to tackle diabetes through
a \$25 million donation from the F.O.E.

Join us today to make a difference in your community!

THIS IS YOUR RECEIPT.

IT IS NOT VALID FOR ADMISSION
INTO ANY AERIE HOME.

Received From
Applicant _____

\$ _____ for the Initiation/Re-enrollment fee

\$ _____ for dues to Auxiliary No. _____

City _____ St. /Prov. : _____

Received by
Signature _____

Date _____/_____/_____

Paid By
Signature _____

33. Suggested Interview Worksheet

REPORT OF INTERVIEWING COMMITTEE

NAME _____ SPOUSE'S NAME _____

ADDRESS _____

OCCUPATION _____

CHILDRENS' NAMES & AGES _____

Telephone: _____ Fax: _____ E-mail: _____

1. Do you believe in the existence of a supreme being? _____

2. Do you object to taking a solemn obligation? _____

3. Are you a member of the Communist Party or any group that believes in overthrowing our government? _____

4. Were you ever rejected, expelled, or did you ever withdraw application from any club, organization, fraternity, society or lodge? _____

5. At the present time, what other organizations, fraternities, clubs, societies or lodges are you a member?

6. Would you be willing to serve on a committee at some time? _____

Bartend _____ Cook _____ Serve Food _____

Clean-up _____ News Bulletin _____ Publicity _____

Social Committee _____ Building _____ Chair an Activity _____

Nominating Committee _____ Ritual Team _____ Other _____

7. What special skill do you have? (Example - Carpentry, Electrical, Masonry, Painting, Financial,

Cooking, Computers, etc.) _____

8. What sports & hobbies do you enjoy? _____

9. Will you attend our bi-monthly regular meetings whenever possible? _____

10. What is your principle reason for applying for membership into our fraternity? _____

Signature of Prospective Member _____

Interviewed by: _____

_____ Date: _____

Designed by Past California State Membership Chairman Fred Roff

34. Dual Membership Applications

1. No initiation fee is required.
2. Must provide proof that their dues have been paid in advance at their Home Auxiliary.
3. Must be interviewed and voted upon.
4. Dues shall be determined by the By-Laws but can be no less than \$10.00 nor more than the regular non-benefit member dues.
5. No Per Capita Tax is paid to the Grand Aerie.
6. Dual Members should NOT be added through Batch Entry.

35. TRANSFERS

1. Must be interviewed and voted upon.
2. Must be a member in good standing with no charges pending.
3. A Home Auxiliary cannot refuse to transfer a member in good standing with no charges pending.
4. Member forfeit any dues paid to the Auxiliary which they belong and are required to pay dues to the Auxiliary in which they are transferring to.
5. Transfers should NOT be added through Batch Entry.

36. Official Receipts

1. Official Dues Receipts **MUST** be printed directly from the MMS System in color. This is the **ONLY** acceptable receipt to show as evidence of membership.
2. The Official Receipt must include the highest office the member has attained, if any.
3. Under 21 Years of Age must be endorsed on the receipt if the By-Laws so allow.
4. You can account for monies collected for dues and application fees within the MMS System.

37. RECORDS TO BE KEPT PERMANENTLY

Secretary's Cash Books
Secretary's Minute Books
Deeds, mortgages, notes, leases and contracts
Authorizations from Grand Aerie Departments
By-Laws (current)
All Tax Records
Transfer Applications
Applications for Membership
(Applications: Permanently or until the member has passed, resigned or transferred to another Auxiliary.)

RECORDS TO BE KEPT FOR SEVEN (7) YEARS, THEN DESTROYED

Secretary's Semi-Annual and Annual Reports
Treasurer's Cash Books
Treasurer's Annual Reports.
Miscellaneous Receipts
Individual ledger sheets and/or cards of deceased or former members
Canceled checks, except those where the liens have not been canceled
Check Stubs
Auditor's Monthly and Annual Statements
Bank Statements

RECORDS TO BE KEPT FOR THREE (3) YEARS, THEN DESTROYED Bills, invoices, etc.

Temporary dues receipts
Official Government and Grand Aerie/Auxiliary Correspondence

NOTE: Official Correspondence should be carefully screened before destroying. Some correspondence could be destroyed in less than three (3) years, while some should be kept much longer. Correspondence that may be needed for any audit should be kept for at least seven (7) years.

38. Checklist of Financial and Reporting Responsibilities for Aeries and Auxiliaries

JUNE

1st - Per Capita Tax Due to Grand and State/Province

JULY

1st - Per Capita Tax LATE

31st - IRS Payroll Tax Form 941 Due for June 30

31st - Qtr. Ends

OCTOBER

15th - IRS Form 990 Due

15th - IRS Form 990 Extension Due if unable to file

15th - Treasurer's Report and 990 Copy Due to Grand Aerie

15th - Auditor Report due for all postcard filers and Canada

31st - IRS Payroll Tax Form 941 Due for Sept 30

31st - Qtr. Ends

JANUARY

31st - IRS Payroll Tax Form 941 Due for September 30 Qtr. end

31st - IRS Payroll Tax Form 941 Due for December 31 Qtr. end

31st - IRS Payroll Tax Form 940 Due for December 31 year end

JANUARY

31st - Forms 1099 and W2 due to recipient

28th - Form 1096 (1099 Summary Report) due to IRS

APRIL

15th - IRS Form 990 due – if extension was filed

30th - IRS Payroll tax form 941 due for March 31 Qtr. end

MAY

31st - Contributions must be received in Grand Aerie for fiscal year

31st - Credit on Convention Reports

31st - Grand Aerie Books Closed

31st - Last POST Date

Assistance: IRS – www.irs.gov website, choose Non-Profit and Charity tab or call 1-877-829-5500

Grand Aerie – accounting@foe.com or charities@foe.com

39.

REPORTING WHERE DUE DATE IS DEPENDENT UPON STATE LAW REQUIREMENTS OR RENEWAL DATES:

Monthly:

- State Sales Tax Reports
- Gaming Reporting

Annually:

- Insurance Documents with Declaration Pages naming Grand Aerie as additionally insured
- Affiliation Agreement
- State Registration or Incorporation Renewal (usually has a filing fee).

OTHER TIMEFRAMES OF NOTE

40. CONTRIBUTIONS:

The Grand Aerie Accounting Department closes the fiscal year on MAY 31. There are no exceptions to this date and late receipts cannot be accommodated.

If you wish to ensure credit for your charity work during the annual convention, all contributions must reach the Grand Aerie PRIOR to May 31. If May 31 falls on a weekend, please adjust mailing dates accordingly to the prior Friday.

GRANTS:

If you are requesting a grant to be presented to a recipient or to be presented at a convention, please request your grant at a minimum of one month prior to date needed.

The grant is processed through your State Secretary's office, the International Charity Director (if over \$5,000), through the Grand Aerie Board of Directors (if over \$10,000) and then can be processed by the GA Accounting Department.

REGIONAL GRANTS:

The hosting State requests the Grant for \$5,000 and must be submitted one month in advance of the Regional Conference



Madam Treasurer

TREASURER

1. Demand and Receive from Secretary all money belonging to the Auxiliary.
2. Give Secretary receipt and deposit money in the proper accounts within 48 hours of receipt of the money.
3. Sign all checks, if authorized by the Auxiliary, signed by President, attested to by the Auxiliary Secretary, and drawn from the proper fund.
4. Keep records, books and accounts and make reports as required by the Grand Aerie/Auxiliary
 - a. The accounts shall be recorded in the book provided for that purpose by the Grand Aerie. The accounts may be maintained in this book or if the records are kept electronically, they shall be printed, copies shall be kept and protected in a three (3) ring binder or cash book for that purpose. This cannot be a copy of the Secretary's Cash Book.
5. Hold in trust all securities belonging to the Auxiliary in a Safe Deposit Box. Must be Accessible to Treasurer but only when accompanied by the Secretary or President.
6. Provide books for audit each month and quarter and when requested by the President or Auditor.
7. Work with Secretary to ensure your books and the Secretary's are in balance, but not copied.
8. Compensation fixed by the By-Laws

TREASURER CONTINUED

Records & Reports

1. Treasurer's cash book.
 - a. It is similar to the Secretary's cash book.
 - b. At the end of the month you should reconcile the bank statements with your cash book.
 - C. Reconcile yours with the Secretary's cash book.

***These balances must be IDENTICAL with those of Secretary each week. At close of business for the month these balances, plus the warrant checks NOT CASHED BY THE BANK, will be the same as Bank Certification.**

TREASURER CONTINUED

RECORDS/REPORTS:

2. Treasurer's Annual Report .

- a. 12 month report ending May 31 each year.
- b. Due by the 15th of October each year.
- c. Coincides with Secretary's filing of the 990 and/or 990EZ.

[illegible]



**Madam Inside Guard
&
Madam Outside Guard**

Inside Guard & Outside Guard

1. Inside Guard

- a.** Maintain a position at the Inner Door of the Auxiliary meeting room.
- b.** Examine the official receipt of every member desiring admission to the Auxiliary meeting.
- c.** If dues are paid, admit the member to the Auxiliary room.
- d.** Assist in the initiation of candidates.

2. Outside Guard

- a.** May provide in the By-Laws that the office of Outside Guard be abolished.
- b.** Shall have charge of the outer room and during the meeting of the Auxiliary shall permit only members in good standing to enter the room.



Madam Trustees

TRUSTEES

Duties

1. The duties of the Madam Trustees shall be as hereafter set out, and the Madam Trustees shall at all times be under the direction and control of the Auxiliary.
2. Immediately after the election and installation of officers each year, the Madam Trustees shall organize by electing a Chairman and a Secretary, each to serve in her respective capacity for one (1) year.
 - a. The Madam Trustees shall hold such meetings as deemed necessary by the Auxiliary, except that the Chairman may call meetings of the Madam Trustees when, in her judgment, same are necessary, and she shall call a meeting when requested to do so by two (2) members of the Madam Trustees. The Madam Trustees shall keep such records as may be required for an official recording and reporting of their activities to the Auxiliary.
 - b. A majority of the Madam Trustees shall at all times constitute a quorum.
 - c. No one (1) of the Madam Trustees, including the Chairman, shall have greater powers than those vested in her while acting jointly and collectively with her associates holding the office of Madam Trustee.

TRUSTEES CONTINUED

- 3.** The Madam Trustees are under the supervision and instruction of the Auxiliary.
 - a.** Shall generally be the medium of contact between the officers and members of the Auxiliary and the officers and members of the Aerie to which it is ancillary.
 - b.** They shall consult with the Trustees of the Aerie with relation to the use of the Aerie premises for Auxiliary meetings, social functions, entertainments and charitable undertakings of a local nature; they shall use their offices to coordinate the undertakings of the Aerie and the Auxiliary in such functions and enterprises to the end that conflicting dates, activities and the like shall be avoided, thereby bringing about a practical and harmonious cooperation between the two.
- 4.** The Madam Trustees shall be responsible for recommending to the Auxiliary the investment of the funds of the Auxiliary in excess of those amounts necessary to defray the current expenses of the Auxiliary. The investments so recommended shall be in such bonds or other securities as shall be approved by the Financial Advisor of the Grand Aerie; or such funds may be deposited, as an interest bearing deposit in a bank designated by the Auxiliary and approved by the Financial Advisor of the Grand Aerie.

TRUSTEES CONTINUED

4. At the close of each semi-annual period or at any other time when requested to do so by the Auxiliary, the Madam Trustees shall make a full report to the Auxiliary of all activities and business transacted by them during such period, including all detailed recommendations made regarding investment of Auxiliary funds.
5. The Madam Trustees shall hold in trust for the Auxiliary all properties belonging to the Auxiliary not otherwise entrusted to a specific officer or group such as those entrusted to the Madam Treasurer pursuant to the provisions of the Rules and Regulations.
6. The Madam Trustees shall see to it that the Auxiliary shall be named as an owner on the Aerie's policy at no expense to the Auxiliary, unless otherwise dictated by State Law.
7. Upon demand of the Auxiliary Auditor or instructions of the Auxiliary, the Madam Trustees shall, at any time, deliver any and all books, papers or other property which they may have in their possession for examination or audit.
8. Upon the expiration of their term of office, or upon their removal there from, the Madam Trustee shall deliver to their successors in office all books, papers or other property which may be in their possession, and which belongs to the Auxiliary.



Auditor

Auditor

Duties

- Procure a copy of the Rules and Regulations and By-Laws upon assuming office from the Auxiliary Secretary.
- Do not write in the books.
- Examine and audit the books of the financial officers and/or committees of the Auxiliary, at the close of business at the last meeting of each month.
- Include records kept by the Secretary, Treasurer, Special Committees, or any person bonded and keeping records that reflect the financial status of the Auxiliary.
- Determine whether books and records are posted currently and correctly and are in balance.
- Audit should be done immediately after the close of business at the last meeting of each month.
- Report of findings shall be submitted to the Auxiliary in writing and read on the floor at the first meeting of the next month and entered in the minutes.

Duties continued

- Complete the Financial Statement, which encompasses the financial transactions for the fiscal year June 1st through May 31st
- Immediately report, in writing, to the President with a copy to the General Auditor of the Grand Aerie, any delinquency in books, reports and accounts of the financial officers of the Auxiliary and any misappropriation of funds.
- Make a written report to the Auxiliary of the audit findings at the first meeting following the last audit.
- The Local Auxiliary By-Laws contain specific laws governing local conditions, such as the hour and day, also the place of the Auxiliary's regular meetings, distribution of the annual dues into the Auxiliary's various funds, the amount of the initiation fee charged, the amount of Sick and Funeral Benefits paid by the Auxiliary, the salaries of the various officers, etc., all of the information needed by you each month as you make the monthly Audit of the Auxiliary's books and records.
- It is also your duty to review the Auxiliary Bond to verify that the Auxiliary Officers are properly bonded.
- Compensation as defined in the By-Laws and not payable until all reports are completed and transmitted.



Resignation and Reaffiliation

Section 6.1 Any member of any Auxiliary who is in good standing and against whom no charges are pending may, without the payment of any fee, resign her membership in the Auxiliary in writing and her membership in the Auxiliary shall forthwith cease upon presentation of such resignation to any regular meeting of the Auxiliary without the formality of acceptance by the Auxiliary. Upon her resignation, she must return her Official Receipt to the Secretary.

Section 6.2 Any member of an Aerie or Auxiliary who has resigned her membership and who desires to re-affiliate in any Aerie or Auxiliary may not do so for twelve (12) months and must do so as a new member.

Section 6.3 No expelled member of an Aerie or Auxiliary shall be accepted as a member or be employed by an Aerie or Auxiliary unless such expulsion had been appealed and reversed by the Grand Tribunal or pardoned by the Grand Worthy President under the Laws of the Order.

Section 6.4 If any Past Madam President of any Auxiliary shall affiliate with another Auxiliary, or re-affiliate with her own Auxiliary after having ceased to be a member in good standing of the Ladies Auxiliary because of non-payment of dues, she shall upon such affiliation or re-affiliation be restored to her former status of Past Madam President and the Auxiliary shall enter her name on the list of its Past Madam Presidents and shall be recognized as such. However, any Past Madam President who has resigned from the Ladies Auxiliary shall not, upon re-affiliation, be restored to her former status of Past Madam President. Any Past Madam President who resigns from the Order shall rejoin as a new member and shall not regain her status as a Past Madam President.

There are only two (2) prohibitions enumerated in the Rules against restoration of a Past Madam President's status upon re-affiliation. They are where a Past Madam President of an Auxiliary has been expelled or where she has resigned from the Order.

Section 6.5 A Charter member of a Ladies Auxiliary dropped from the rolls of the Auxiliary for any reason, regains recognition as such Charter member upon re-affiliation with the Auxiliary of which she was one of the original members, but of no other Auxiliary with which she might affiliate unless such affiliation is as a Charter member.