



# **Navy League of the United States**

## **Council Presidents Handbook**

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# Table of Contents

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Introduction	3
Overview	4
Council President’s Duties and Responsibilities	5
What Are My Resources?	7
Where to Begin	8
Getting to Know Your Team	9
Telling Your Council Story	10
Administrative Requirements: A Bibliography of Documents	11
Leadership Development	14
Leading Council Meetings and Activities	16
Recognition and Awards	19
When It’s Time for Turnover	20

# Introduction

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The purpose of this handbook is to give you tools to be successful in the job of a Council President and present some proven procedures, ideas, and tools that will help guide you as your term progresses.

Navy League Mission Statement:

*The Navy League of the United States is a civilian organization dedicated to informing the American people and their government that the United States of America is a maritime nation and that its national defense and economic well-being are dependent upon strong sea services — the U.S. Navy, U.S. Marine Corps, U.S. Coast Guard and U.S.-flag Merchant Marine.*

Navy League Goals – Advocate – Educate – Support

1. Educate national leaders and the nation
2. Support the men and women of the sea services
3. Provide assistance to the sea service families
4. Support youth programs

This Handbook, together with the Operations Manual, will help begin the process of council president turnover. Council officers are encouraged to focus their events and activities on meeting the Navy League's Goals.

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# Overview

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Welcome to your new role as Council President and thank you for serving. You have probably served on the Board of your council and are familiar with the board members. As the new Council President, you have the opportunity to make a first impression, so you will want to formulate your game plan...be realistic about your goals/priorities for the council...and understanding your agenda probably won't move forward without the support of your board members. As you learned from the [Council Leadership Webinars](#) , you will want to have a means for setting goals with your board, i.e. an offsite workshop for brainstorming.

Depending on your style you will be drawn to either the tasks or the people. Both are part of the job and you must assess where to begin and how to mix the two so that the outcome is programs that are useful to our mission and goals.

There are administrative responsibilities, however, getting to know your board, your council members, your community affiliates and sponsors is crucial to your council and to you as a successful president. Seek to achieve a balance between administrative tasks and the programs and activities that result in meaningful involvement of the members. Remember, your primary task of getting to know the people will be achieved by advancing the mission of the Council. Balance is the key even though you have your personal preferences.

Remember, you are not alone. Other Council Presidents are especially helpful. They either have or are facing the same challenges you are facing. Attend area, regional and national meetings and participate in the conference calls to take full advantage of the help that's available. Our headquarters team is available to support you in your role. At every level of our organization there is information and support.

# Council President Duties & Responsibilities

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## Priorities for the New Council President

The new Council President should complete the following priority action items as soon as possible:

1. Change the signature card for your council's bank account(s) so that you and other designated officers can sign checks. Note: Most financial institutions will require a copy of the Board resolution that identifies the officers who are authorized to sign checks for your council.
2. Determine duties and responsibilities of newly elected Officers and members of the Council Board of Directors. Recruit members (including Community Affiliate members) to fill critical officer vacancies on your Board of Directors.
3. Submit a council change report identifying new officers - requested from and submitted to Membership Services at [membership@navyleague.org](mailto:membership@navyleague.org).
4. Register on the [member dashboard](#). Registration allows you to access council membership and training tools.
5. Review the most recent version of the Operations Manual (Section III) on the member dashboard. The [Council Support Materials](#) page is valuable as well.
6. Meet with your Area and Region Presidents.
7. Appoint an Audit Committee (if required).
8. Formulate an Annual Plan; establish Strategic Objectives and Annual Goals.
9. Introduce yourself (phone call or email) to the Area President and Region President for your council. Determine the date/time/place of the next Area and/or Region Meeting and plan to attend.
10. Introduce yourself to the Commanding Officer/Leader of all sea service units adopted and youth groups sponsored by the council.
11. Update the masthead for your Council Newsletter and Website; announce/post election results on your Facebook page. Update your council's Home Page in the [council locator](#) on the NL website.
12. Order business cards and encourage all council officers to do the same.
13. Update key contacts email listing in your council communications plan.

14. Appoint Legislative Affairs VP. Schedule a visit with members of congress assigned to your council under the NLUS Grassroots Legislative Initiative. Contact Legislative Affairs team at HQ for assistance.

# What Are My Resources?

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There are designated Navy Leaguers ready to provide support if you just ask. Navy Leaguers who have history with the Navy League in some capacity, especially within your council, may be the most immediate resource. You know them, and those relationships will strengthen the work you are striving to do. As relationships change within the councils, facilitate that by taking the authority you have been given to perform your new leadership functions.

One of the most difficult things for many is to delegate responsibilities, but your job will be impossible unless you do. Consult with your leadership, but clearly appoint them to the tasks that are to be done. After that, providing direction is the most helpful part of delegating responsibility. You should develop a vision, using lessons learned from your many levels of involvement in Navy League, that you must convey through your leadership skills. Your meetings, conversations, and emails will convey your familiarity with our national issues and topics as well as inspiration from the spirit of our leadership and our mission. You will want to pass these on to the other directors who don't have the benefits of that involvement. They will respond with the same kind of enthusiasm and passion that you convey to them.

Ask for feedback or reports on their activities to let them know of your interest in what they are doing. Most of all be friendly. Sometimes make a personal call without a particular agenda.

Together, with your council teammates, you will shape and steer the life of your council. It will reflect your collective efforts. Craft your vision with brainstorming board retreats where your priorities are determined, and strategies are developed. It is optimal to meet with the directors apart from your regular business or board meetings, to provide a different setting for the planning you do.

After your council teammates, your next best friend will be the Area President, or Region President. They also most likely will be familiar with your challenges as

they too have likely held your job. That makes this person an understanding ally of your unique position and needs. Reach out to get acquainted and discover how they do their job and how they see yours. The bridge you build with this person may be your best source of understanding and support.

The Area President is assisted by a Region President who is a little more distant and covers a larger geographic area but can be a close ally. Usually, you will be in closer communication with the Area President, but occasionally the Region President will reach out to you as well. There may be meetings at either or both levels which will be beneficial for you to attend.

Area Presidents have their own job to do and only part of it is relating to councils. Reach out and take advantage of the experience and knowledge that resides in that person. There may be an area counterpart for your council members working with the AP in the same tasks as your council. It is worth checking out and contacting that person. Some Area Presidents organize their team in a way that resembles councils. Remember, you share the same Navy League goals, and their tasks are similar to yours. You may be able to connect your council working on a specific task with an area volunteer working on the same task. There may be someone assigned to collaborate with your specific council. If there is, they could attend one of your council meetings and make themselves available as a resource.

Another group available to you is our national staff. Find out who they are and how to use them as a resource. They are ready and willing and have many different skills. They work with many councils and have a broad knowledge and experience and will guide you to the many resources available. National Directors are often the ones in these positions and are happy to help.

Most importantly, many resources and best practices are available online at [NavyLeague.org/council-best-practices](http://NavyLeague.org/council-best-practices). Attend the monthly webinars, as you will find other councils with similar questions. This is one way the Navy League strengthens itself. By building on the successes of others and by creating camaraderie across the many geographies that the Navy League covers.

# Getting to Know Your Team

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Getting to know your team is really building your team and requires knowing each one. It is worth spending time one on one with each of the directors, so you understand what drives them. Then you can appeal to that person and enable a volunteer to feel the joy of doing something they really like. It also requires they spend time with each other in frank, open, informal discussion. That is how you become a team.

In the section on “Am I Alone” there is a discussion about how board retreats or strategic planning sessions enable goals to be set, priorities developed, and responsibilities assigned. All that occurs as the directors become a team through participation in the process. There is simply no other way. It takes time and there are no short cuts. You can’t do it for them and hand it to them, but you can lead them to the desired outcome. If they make the journey together they will own the outcome and be invested in it in a way they wouldn’t/couldn’t if it were handed to them on a piece of paper. Some call it “group process” others just call it “team building”. It is how the work of the council is done and the goals are achieved.

You won’t be a professional facilitator, but you can encourage honest, frank sharing by modeling that behavior yourself. As they see you doing it, being it, they will mimic or follow in your footsteps with that same kind of transparent honesty as they share what really matters to them and your council agenda becomes clear to everyone. When you begin to share a vision or develop a consensus, energy is developed, and you are on your way to becoming a team.

# Telling Your Council Story

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Every council has something that makes them special, and it's important to be able to tell that story. Understanding how to tell that story will help you gain members, community affiliates, and sponsors in your community. What does your council do well? Conversely, what are your areas for opportunity? Being able to identify strengths and weaknesses will make you aware of the areas you can work on.

It might be helpful to come up with an “elevator speech” for your council - a concise list of reasons why someone would want to join your council that is easy for current members to remember and use to recruit.

To help tell the Navy League story, councils can request printed materials from HQ to help recruit and retain members. This includes applications, regular & active-duty brochures, giveaways, and more. Examples of materials are available on the [Member Toolkit](#).

# Administrative Requirements: A Bibliography of Documents

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## 1. These Are Mandatory Records That Should Be Available in your Council Files

Certain council records must be retained for the life of the NLUS council. Permanent records consist of legal and IRS documents. Other records have shorter retention times and are *noted below in italics*. Records not marked with a retention time change periodically, so the current record should be retained. Out of date records should be destroyed so that there is no confusion as to the effective edition of a record. The list below should be located and reviewed by the incoming Council President:

- Original Council Bylaws and all subsequent amendments.
- Original Council Articles of Incorporation and all subsequent amendments.
- Council Charter.
- IRS determination letter for Non-profit Tax Exemption, issued by the IRS or an equivalent letter from the NLUS Senior Director of Finance certifying that the council is a member of the NLUS Group IRS Exemption.
- Original Application for Tax Exemption for IRS (IRS Form 1023 or package sent to the finance team at NLUS HQ).
- IRS Tax Returns (Form 990 series and required Schedules) – *all tax-exempt councils must file a return.*
- State letter confirming council registration as a non-profit organization with the original application.
- State letter confirming that the council is exempt from state sales tax with the original application.
- Other state requirements for non-profits (e.g., fundraising registration).
- Personal property tax filings for state and local taxing authorities.
- Correspondence with IRS and state/local tax officials.
- Copies of Donor Acknowledgement Letters for all donations to council of \$250 (cumulative) or more – cash or in-kind (*hold for at least three years*).

- Copies of receipts issued by the council for all donations – cash or in-kind (hold for at least three years).
- Council Financial Reports/Records for *at least three years*.
- Council Financial Audit/Review (including scholarship funds and Naval Sea Cadet Corps unit audits) held in conjunction with assumption of the Council President position plus previous audits/reviews for *at least three years*.
- Employment tax records (Form 941 and copies of Form 1099-MISC issued) for paid personnel who work for the council (hold *at least four years*).
- Minutes of Council Annual Meeting and Council Board Meetings for *at least three years (supporting documentation for council financial audit/review)*.
- Copies of Approved Board Policies (*retain until superseded or cancelled*).
- Previous year Council Annual Report (completed by outgoing president – needed to continue to receive rebates).
- Navy League Operations Manual.
- Trust documents for all council trusts and records of all distributions from trust.
- Records of owned asset - retained for *life of the asset plus at least three years*.
- US Postal Service Bulk Mail indicia letter.

## **2. Useful Records and Materials Available on Our Website**

There are additional useful documents/materials that can help the Council President be effective in leading the council. The HQ Staff Directory can be found on the [Contact Us](#) page. They can be found in [Council Support Materials](#) on the dashboard. It includes:

- Council Best Practices.
- Council Organization Chart and Position Descriptions.
- Presiding Officer Duties (Parliamentary Procedures).
- National, Region and Area Organization Charts with incumbents identified.
- Council approved budget with all subsequent amendments.
- Compilation of Best Practices
- NSCC HQ Staff Directory and Directory for your NSCC Region.
- Council Guide for the Support of Naval Sea Cadet Corps Units.

## 1. Assess the Need to Obtain Missing Documents

- Recover or replace missing records ... The following guidance fix and cut words!
- Records that cannot be replaced include the original Council Charter, Articles of Incorporation with amendments and Bylaws with amendments. Therefore, a search among the belongings of previous council officers is the action recommended. Council participating in the NLUS Groups Tax Exemption can request a copy from HQ of the Bylaws submitted with their group exemption application to the Senior Director of Finance at NLUS Headquarters.
- IRS records can usually be replaced by ordering copies from the Internal Revenue Service; *a fee is generally required for all copies requested.* Therefore, the decision to replace missing IRS records may be conditioned on the need to replace them – e.g. a council that has filed tax returns may decide to order replacement records because an IRS audit is anticipated.
- A copy of the IRS Group Determination letter and the tax exemption application package for your council can be ordered from the Finance team at NLUS Headquarters.
- Copies of state records can possibly be obtained from the originating office; a fee may be required to obtain copies.
- Copies of recent Council Annual Reports can be obtained from the Membership team at NLUS Headquarters.
- The NLUS Operations Manual is available on the dashboard.

# Leadership Development

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Council leadership is a multi-faceted topic. Leadership development should occur not only at the Council President level but within the Board of Directors and the council. The Navy League National website membership dashboard has past webinar trainings that you and your council should find interesting. Additionally, there is a section on the membership dashboard labeled [Council Best Practices](#). These best practices are great for generating new ideas for your council involvement in the community as well as tactics for membership growth. As the Council President, your familiarity with the National website will go a long way to helping you lead your council.

The main local resources you have are your Board of Directors and your council membership. Leadership of a volunteer organization is challenging and extremely rewarding. Typically, volunteers join for a specific reason and want to be engaged and involved. Training for your Board will go a long way towards helping you meet your council goals. The great thing about volunteers is that they bring new ideas and new ways of doing things. Help them understand what needs to be done and let them run with it.

Your directors need to understand your focus and priorities for the future. A recommendation would be to have a binder prepared for each board member that contains a calendar of events, bylaws, mission and goals, a list of your priorities for the year, and contact information for committees. Have a special meeting to discuss the contents of the binder and to update goals, committees, etc.

You are not in this alone! Not only do you have your board but numerous other resources, to include: your Region/Area Presidents, past presidents, and direct contacts at National. Don't be afraid to ask questions. The RP and AP have been in your shoes before.

While a lot of leadership development is what you do for yourself, much of it comes from you training your Council leaders. Although much of the training described in this Handbook is for CPs, it will guide you to training for your

officers and directors. Webinars and PowerPoints provide ample opportunity for regular training within the council. Training can not only end confusion and create focus, the clarity it provides will also generate enthusiasm as your team grows together. The strength of relationships gives power to a council. Check the Membership Dashboard Calendar for important dates and webinars.

Delegation is important for you to practice. That is another form of leadership development. Your frustration will diminish as you delegate more. Learning that skill of simply stopping yourself from doing everything for everybody is a key to a successful president and having an outstanding council. Even though it may seem easier to do “it” yourself, frustration or failure is an inherent outcome.

Another tool for you to use is attendance at the Annual National Convention. The National Convention has a training track for Council Leadership. It provides not only information but connections through relationships. Your confidence grows with your knowledge. It also grows with your relationships. Nothing is more helpful than a conversation with an experienced peer. Attending the National Convention should be a priority for the leaders in your council.

# Leading Council Meetings and Activities

Whether your council is formal or casual you will want to be organized and prepared with a plan to take charge. Depending on your own style it will be more or less structured, but there must be a beginning and ending with a worthwhile agenda in between.

A predictable order of events will create a sense of direction and accomplish the necessary moments with a sense of purpose so establish an agenda that will normally be followed and keep it. Keep the call to order brief but welcoming as the meeting begins.

Some councils start with a prayer, all standing and remaining standing for the Pledge of Allegiance to the American Flag. The prayer should be inclusive of all who are present with a sensitivity to differences. Avoid being divisive by finding common ground that is shared by people of faith. Express a sense of gratitude for the blessings of the day, including heritage and history, commitment and loyalty. Include specific needs of the moment that are in the council's collective awareness through the media as well as those more specific to your community. Never fail to mention those we serve who are wearing the uniform of our country. Conclude with our common purpose and intention. If there is a Chaplain in your council officers, it will require less of you to ensure that the prayer is truly beneficial to all present and not simply a ritual that is followed.

Most councils have collected logos or insignia that are part of the heraldry of our organization. Typically, this includes flags of the various services including the American flag. Be sure they are in place, properly displayed, before the meeting begins. Be sure that the American flag is in a place of precedence. Begin the Pledge immediately following the prayer.

Introductions are important in establishing a sense of community in the beginning and bringing people together. Normally uniformed personnel that are present are welcomed and introduced or given the opportunity to introduce

themselves first. Next recognize visitors and guests beginning with those who are guests of members. Always ask for others who may have not received a personal invitation or are not hosted to be sure no one is overlooked. Upon completion of the introductions, again welcome all to the meeting.

Next are the announcements. Be careful to prevent them from taking too much time because they are not the purpose of the meeting, but merely are a means of sharing information needed by all. Careful, precise wording avoids rambling into exhaustive detail. Boredom sits in quickly so make sure announcements are energetically presented and full of excitement about the news presented. If these are made at a meeting which includes a meal, time may be saved if the waiters are presenting the food. Discussion with the wait staff will insure an understanding of smooth way to save time without disruption of the announcements.

As soon as the announcements are completed, mention that the speaker will be introduced after the meal. Be alert to see that the speaker is served early and ask whether he/she wants to begin speaking before dessert is finished. After the speaker concludes, if there has been time reserved for questions you may facilitate but usually the speaker will do that. About the time to adjourn, you're rising from your seat, if you haven't earlier, or your moving toward the speaker if you are standing, will signal to all the conclusion of the time for questions.

Presenting a Council Challenge Coin to the speaker is an appropriate and acceptable way to express appreciation. This takes forethought and planning to have one available and a quickness of mind on your part to find the right moment for the presentation. If done well your meeting will end on a positive note with a sense of satisfaction for all.

A couple of important things might be said about meetings before ending this section of the Handbook. Consensus is a good thing to have and should be the goal of a leader to create harmony and unity. Some decisions must be made by majority vote to achieve legal standing and that should be done in those cases where it is required. Agreement is always a good thing to foster cooperation and common effort so seek mutual consent whenever you can.

That being said, a word about parliamentary procedure must be said. Roberts Rules is the standard we follow. Few of us know it all, but we should learn the basic procedures and actions required for conducting a meeting. So, do a quick read of the Rules. Better yet find out on your council has a proclivity to order and task them for assistance. They might be known as the parliamentarian, but whether or not, it is helpful to you and your leadership for you to have an able assistant when detail is needed.

Wherever you go, whatever you do, you are the President and you will set the tone and style of behavior. Stay positive and keep your energy up because others will draw from you and follow your modeling. It is the reality of your mentoring in the council. Attitude is as important as knowledge and can make up for a lack of knowledge if used to motivate learning and achievement. What an opportunity you have to make a difference by motivating and inspiring others. Some of it is your office as the President and some of it is you, the one the others have chosen to follow.

# Recognition and Awards

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Recognition is a very potent motivator for volunteers! And, we all are volunteers. Recognition is the *reward!*

There are many ways to do it. A few samples are:

1. Personal notes – Hand-written or by e-mail... Thank you, great job, well done, good newsletter, excellent meeting, welcome aboard etc., are the most effective. Comment on Facebook postings!
2. Personal Telephone calls - very quick and easy.
3. Emails are a very efficient way to contact and recognize one or more individuals.
4. Everyone likes to see their name in print – make sure you honor the work of council members by naming them in newsletter articles about their projects.
5. Present internal awards for outstanding work or achievement to council members at meetings. Submit names of outstanding members for National recognition.
6. Encourage your council to work toward the National standards for recognition as an outstanding or Meritorious Council, by having awarding-winning programs. Check the Awards section of the Operations Manual for criteria.

# When It's Time for Turnover

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Council President turnover is an event that can occur as frequently as every year, yet most councils have no procedure for this process. Lack of a procedure is not a serious problem for councils that have an effective succession plan, such as rotating officers through various responsibilities as they advance toward the Council President position. However, many councils find they must elect a relatively new board member to the Council President position when no-one else is willing to take the job. This guide will help the new council president ensure he/she has the necessary information and records for a successful tenure

When your term is finished, and a new Council President is installed, their job begins and yours will come to an end. Remember how hard it was to start. You didn't know all the "ins and outs" of the position, but now you have kept records and will pass them on to the new area president. You will be a valuable resource as Immediate Past President.

Things to have in your turn-over records should include:

- Council President's Handbook
- Council Membership Roster with contact information
- Contact information for other Council Presidents and National Directors along with National Staff, including a description of their job titles. Download from [member dashboard](#).
- List of key dates and events of the Area, Region and National
- Current Operations Manual
- Council Files, Annual Reports, Newsletters
- Copies of key correspondence
- List of council sponsored NROTC/NJROTC and Sea Cadet units with contact information
- List of all area military commands, points of contact and types of involvement