Process and Guide for Filling out Branch Visit Form.

- Please note the Branch Visit form may change at any time based on the needs of the organization.

1. The Form
    a. The purpose of the form is to collect the most pertinent information so that our Zone and District Commanders can provide the best support to branches.
    b. It was designed to be flexible to the needs of the organization. By making the information more relevant, but without making it cumbersome to fill out.
    c. The information collected will change from time to time and will be based on our current needs as well as based on what branches are looking for in terms of guidance and leadership.
    d. It is just as important for branches to share and ask for information as it is for the Command to provide information. This must work both ways.

2. How to Complete

    First Page

    a. The top portion is straight forward. Put a Y or a N for the yes and no questions, and an answer for the ones that need a number.
    b. Succession Plan – what is the branch doing to stay relevant, to bring on new members, develop the next executive and leaders.
    c. Sports – Many members participate in sports. It is a great way to build camaraderie. Use this to identify potential players or even new sports.
    d. Since last visit – This is to encourage branches to try new things. See what other branches are doing. Stay active and engage with their community. We often get the question - how do we bring in more members? The answer is – Engagement.
    e. Training – we do not want to guess what branches want to learn about. The seminars at conventions are a great way to learn, but it does not work if the subject matter is not relevant to the branches.
    f. Legion Week – Some branches do an exceptional job with this. We want to know what is happening so we can help those that struggle with it.

    Second Page

    a. Poppy Funds – List all Poppy expenditures. This lets us know what branches are doing within their community to support Veterans. It helps us tailor our programs and it also lets branches know what is important and relevant for Veteran support.
    b. For community involvement we want details on how they interact within the community. Even if it is just volunteering at a ticket booth for the local fair or school event. These are important facts to know. We say we are the cornerstone of our communities, so then let

us actually be a cornerstone. Be as detailed as possible.

c. The last piece is the opportunity to provide feedback on other issues or areas of concern within the branch. It is also a spot to provide positive feedback. These visits are to be productive, and the best way to get that is to be positive. Let us give them praise for the good things they are doing and be constructive on the things on which they can work.

3) The Process
   a. Take good notes during your visit and refer to them as you fill out this form. If you are missing anything, you can always call them back and ask.
   b. From the information you collected during the visit, fill out the form accordingly.
   c. From the information you collected, provide feedback on the After-Action report form. This is designed to provide a clean, easy-to-read feedback form on important items that need to be addressed. Putting into writing makes it clear to the branch what they can work on and allows follow up. It also provides the next set of leaders to know what has been done in the past.
   d. Once you have completed the Branch Visit and After-Action report form, remit a copy along with your expense form to your District Commander.
   e. Your District Commander will review the form and provide feedback and guidance for you to take back to the branch. This also allows time to make any changes to the content of the forms.
   f. Once you receive the form and the feedback from your District Commander, you will then provide a copy of the completed form to the branch and review it with them. This is an important step. You want to ensure that they understand and receive the information properly. Branches are not used to getting these back, so this is a big step for them.
   g. A copy of the completed forms along with your travel expense form will be sent to Command from the District Commander.