

# MARINE CORPS LEAGUE PROGRAM FOR PROFESSIONAL DEVELOPMENT

## Lesson Plan 1



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# **WELCOME**

The Training staff would like to thank all of you for your interest in improving the efficiency of the Marine Corps League. We understand that your time is valuable and we appreciate the effort you have put forth to read the material the Professional Development Program.

We will strive to make this as informative as possible and to make you feel that this was time well spent.

## **Purpose of the Professional Development Program**

- a. To expose new members to the scope of the League, to make them knowledgeable and productive members.
- b. For the old Salts to bring them up to date on changes in the League, and remind them of the details of the league to help them to be better prepared to advance to Leadership in the Departments and above.

# TEN PRINCIPLES OF LEADERSHIP

1. Have a vision and develop a strong sense of where you want to take the Detachment. Develop goals along the way so you can measure progress and share the achievements with the membership.
2. Build a consensus. You must invest time in articulating the vision for the Detachment. It must be a Detachment vision because if it's your vision and you leave office, the vision leaves with you. This is the important part of building consensus. You must continue talking about the vision from many different aspects until everyone understands it in their own way.
3. Be confident in your Leadership skills and have a strong belief in your chartered direction. There is no need to develop an opposition. If your vision is shared, it should motivate everyone so you don't have to make enemies in order to motivate the membership. Achieve the vision because it is the right thing to do.
4. Allow time to achieve your goals. It will not come about overnight or all at once. Be satisfied with measurable progress toward the goal. If your vision is right and if your message is received, the means will present themselves in time.
5. You will not achieve all of the goals that are set on your watch, that's OK. After all, it's not about you, but about us!
6. Your membership is trying to do the right thing. Assume this is true for all of your members, regardless of standing within the Detachment. If they seem misguided, discover whether or not they understand the mission. Often, they just need a bit more guidance. That's what leaders are for...
7. Allow for human failure. In everything that we do there will be setbacks associated with human error. The majority of these errors will be errors of omission rather than errors of commission. Giving someone a second chance will never hurt you, and will often help.
8. It's our Detachment, yours and mine, and everyone should be held accountable to meet the expected expectations. Meeting expectations is a two-way contract. This is the only way an all volunteer organization such as the Marine Corps League will work over the long term.
9. Empower your members, give clear guidance and intent and let your people do what they do best! Write good policy, and then drive execution to the lowest levels practicable. You will be amazed at the results.

10. Embrace change, but protect your culture as a Marine and the ethos that makes us what we are. Change is how we grow, how we stay sharp, how we deliver what the membership needs. Don't fight it, but control its direction by articulating your vision. Remember you don't have to do it all at once. In embracing change however, do not abandon things that truly make us who and what we are.

A. Be technically and tactically proficient: Before you can lead, you must be able to do the job. As a Marine Corps League Officer, you must be able to demonstrate ability to accomplish your mission; to do this you must be able to answer questions and demonstrate competence in your position.

B. Respect is the reward of the Marine Corps League Officer who shows competence. Tactical and Technical competence can be learned by attending Leadership Classes reading and becoming acquainted with the Bylaws, enclosures and Administrative Procedures and from on the job training. To develop this leadership principle of being technically and tactically proficient, you should:

- Seek a well-rounded education by attending all of the Leadership Classes that are provided by the Detachment, Department or Division. You can also do independent reading and researching through the different manuals that are provided; Roberts Rules of Order, The Uniform Manual, Public Relations and most especially, the Bylaws, Enclosures and the Administrative Procedures. Seek out and associate with capable leaders, observe and study their actions.
- Seek opportunities to apply knowledge through exercise of command. Good leadership is acquired only through practice.
- Prepare yourself for the job of leader at the next higher office.
- Know yourself and seek self improvement, this principle of leadership should be developed by the use of leadership traits. Do self-evaluations to determine your strengths and weaknesses. You should work hard to strengthen your weaknesses and use your strengths to their fullest capabilities.
- With knowledge of yourself and your knowledge of group behavior, you can determine the best way to deal with any given situation. In dealing with membership in certain situations, you may have to be firm, however in many scenarios you may have to use the Big Brother approach. But you must keep one thing in mind . . . you are dealing with VOLUNTEERS.
- In your capacity as a Detachment officer, do not hesitate to ask for advice from those that have been there and done that . . . It will show that you have not put yourself above them.

- Make an honest evaluation of yourself to determine your strong qualities and your weak points.
- Strive to overcome any deficiencies that you may have.
- Seek the honest opinions of your friends and superiors to show you how to improve your leadership abilities.
- Learn by studying the cause for failure or success of other leaders.
- Develop a genuine interest in people and acquire the human touch.
- Master the art of effective writing and speech.
- Have a definite goal for the Detachment and a plan to attain it.
- Know your members and look out for their welfare. This is extremely important. Know your members' capabilities. You do not want to assign someone to a committee chair if he/she is nervous and cannot work without supervision
- Remember, all members are to be treated the same whether they are the most active or only come around once in a while. If you show the same concern for all of your members, you will over time earn their respect and loyalty.
- Be approachable; let the members see you in action.
- Put your member's welfare before your own.
- Encourage individual development.
- Keep your members informed. Marines by nature are inquisitive.
- By keeping members informed, you are promoting efficiency and morale.
- You should promote initiative, enthusiasm, loyalty and convictions.
- Be alert to stop the spread of misinformation.
- Set the example: All too often as a Marine Corps Leaguer progresses through the ranks, he/she develops an attitude of "Do as I say, not as I do".
- Show your members that you are willing to do the same things that you ask them to do. Be out front!
- Be well groomed and in the proper uniform. Insist that your members are too. Be the Shining Example.
- Maintain an optimistic outlook.
- Always conduct yourself so that your personal habits are not open to criticism.
- By your performance, develop the thought within your membership that you are the best Officer for the position that you hold.
- Delegate authority and avoid over supervision in order to develop leadership among subordinates.

C. TO BE SUCCESSFUL:

You must be tolerant and be able to accept different personalities. You must respect the opinion of your members and never lose sight of the fact that these members are VOLUNTEERS!!!

You must also accept being in the minority at times. You must try to envision the perception of others.

D. WHAT YOU SAY TO THEM AND HOW YOU SAY IT, IS IMPORTANT! What may seem innocent and harmless to you may be perceived by others as Hurtful and Calculating.

E. LISTEN, LISTEN, LISTEN!

Understand the true meaning of “argue” and offer reasons to DISPUTE and DISCUSS. Always accept the MAJORITY RULE. You don’t have to like it, but you do have to accept it. A MAJORITY VOTE usually reflects what is best for the Detachment.

Keep your meetings moving and keep the idle chatter to a minimum. You should follow an agenda and stay on course. You should also have a monthly Staff Meeting and make them open to the membership.

The Bar is CLOSED and the Smoking Lamp is OUT! There is nothing in the Bylaws to cover this except, COMMON SENSE.

If your intention is to become part of the Leadership, you must read, and develop a working knowledge of the Bylaws and the Administrative Procedures.

F. ONCE ELECTED:

- Lead within the scope of your authority.
- Understand your limits.
- Make only the decisions that you are permitted to make.
- Accept the tasks that are assigned and exercise self-initiative tasks.
- Understand the Chain of Command and know where you stand within the Chain.
- Keep everyone in the chain informed.

# **COMMUNICATION IS THE KEY TO SUCCESS**

- U** Understand your role within the Chain of Command.
- S** Stay within your scope of leadership and Delegate Tasks.  
Stay out of the way and Let them do their job.
- M** Manage your time efficiently so you can be effective.
- C** Communication is the key to your success or failure.

## **DO NOT HESITATE TO DISSEMINATE**

### **REGULATIONS GOVERNING LEAGUE**

As a 501 c (4) we are a charity much like the concept of United Way, Red Cross or other major mainstream charities, but volunteers, not paid staffers, man our local offices. Our charity has a stated purpose.

“The League is classified as a Veterans military service organization and was formed for the purposes of promoting the interests of the U. S. Marine Corps, to provide camaraderie and assistance to Marines, as well as to their widows and orphans and to preserve the traditions of the U. S. Marine Corps. It is a not for profit organization within the provisions of Internal Revenue Service Code 501 (c) (4), with a special group exemption letter which allows for contributions to the Marine Corps League, its Auxiliary and subsidiary units to be tax deductible by the donor.”

## **WITH THIS, THERE ARE CERTAIN RULES OF CONDUCT.**

### **MISSION STATEMENT**

Members of the Marine Corps League join together in camaraderie and fellowship for the purpose of preserving the traditions and promoting the interests of the United States Marine Corps. This is accomplished by banding together those who are now serving in the United States Marine Corps and those who have been honorably discharged from that service; voluntarily aiding and rendering assistance to all Marines, Marine Veterans and to their widows and orphans, and by perpetuating the history of the United States Marine Corps through fitting acts to observe the anniversaries of historical occasions of particular interest to Marines.

# **PURPOSES OF THE MARINE CORPS LEAGUE**

- To preserve the traditions, promote the interest and perpetuate the history of the United States Marine Corps and by fitting acts to observe the anniversaries of the historical occasions of particular interest to Marines.
- To band those who are now serving the United States Marine Corps and those who have been honorably discharged from the U.S. Marine Corps together in fellowship from that service; that they may effectively promote the ideals of American freedom and democracy.
- To fit its members for the duties of citizenship and to encourage them to serve ably as citizens as they have served our Nation under arms.
- To hold sacred the memory and history of the men and women who have given their lives to the Nation.
- To foster a love for the Principles which they have supported by blood and valor since the founding of the Republic.
- To maintain true allegiance to American institutions.

## **FORMING A NEW DETACHMENT**

A temporary Commandant, Adjutant and Paymaster are selected by the members of the Detachment to act as their respective officers, with the cooperation of all the members to secure new members before the date set for the closing of the charter application when the permanent staff of Detachment Officers will be elected. Subsequent elections may be held in accordance with the National Bylaws and Administrative procedures.

A general comment can be made regarding all Detachment offices. Ability and willingness to serve is a major factor for consideration of any office. Second, every office is important and will require time and commitment to minimally meet the needs of the Detachment. Members should consider the time and commitment required when deciding whether to accept an officer's position; factors of work, family life and other outside pressures have to be accounted for before a commitment can really be made. Qualified officer candidates will not generally possess all of the characteristics, traits and skills that are useful to a particular office.

The listing that follows describes attributes that may be desirable. Each candidate and each Detachment should decide those talents that are of importance to the genre of the Detachment and which characteristics can be acquired through training/education. Provide additional visibility to the Detachment and its programs.

## **DETACHMENT**

To aid voluntarily and to render assistance to all Marines, uniformed and civilian, as well as their widows and orphans.

It is the duty and responsibility of the Commandant to promulgate the concept of the League. While every Detachment is concerned and interested in developing its membership and programs, and wanting to take honors for being the best and most uniquely qualified Detachment in the League, there is a larger responsibility to all Marines and all Leaguers.

Every Commandant needs to be aware of areas where Marines live, where meeting locations are not conducive to participation by these Marines, and/or where there are enough Marines to generate interest in the Marine Corps League organization.

The Commandant and Detachment members have an obligation to fellow Marines to assist in developing a Detachment to benefit these Marines. Information in a later section describes the steps for starting a new Detachment, but every new Detachment needs the help and support of existing Detachments. The important issue is bringing Marines, new members to the League.

## **DETACHMENT OFFICER DUTIES**

The following information is provided to assist Detachments in the selection of officers, assisting members in determining their interest and capability in an office, and to provide an outline of possible job functions that can be carried out by each officer – what the Board of Trustees and members should expect from the incumbents of each office.

There are some duties that are specifically required for each Officer. However, there are also some functions that may be optional or delegated based on individual capabilities. Keeping in mind the section on Functions and Objectives of the Detachment, some leadership requirements are to be determined by the Detachment in consideration of plans and capabilities.

## **APPOINTED DETACHMENT OFFICERS DUTIES OF OFFICERS**

### **SGT-AT- ARMS (SA)**

The Sgt at Arms is the first contact with members and guests at the hatch. By allowing those out of uniform to proceed without correction or guest not immediately assigned an escort and is reporting “all present are qualified to remain” has failed in their responsibility to the Detachment. Shall preserve order at all meetings and perform such other duties as are required by the Detachment Commandant. Also will fulfill all duties prescribed in the Marine Corps League Ritual.

The Sgt at Arms will insure that members adhere to the following:

- Uniforms (Enclosure 3 National Bylaws)
- Membership Cards, and check expiration date.
- Setting the meeting facility and securing the accouterments of detachments
- Maintains order at Meetings

#### **A. Maintain Order At Meetings:**

The Sergeant-at-Arms (SA) is required to maintain order at meetings in conjunction with the presiding officer. The SA should assure that there is no extraneous talking or activity, which is disruptive to the meeting or subjects being discussed. By initiative or direction, the SA may be required to caution and/or remove any disruptive persons or other factors during the course of a meeting. The SA needs to be assertive, yet courteous, in maintaining order. In most instances, a simple and quiet reminder to those who may be disruptive is sufficient.

## **B. Clean Up of Meeting Area**

It is the Sergeant-at-Arms' responsibility to make sure that any necessary clean up and policing following a meeting is done properly. If such clean up is required, the SA may designate members to the task and take responsibility for leaving the facilities in the proper manner.

## **C. Respond To Instruction From The Commandant:**

(Abide By The Ritual of Office)

The Sergeant-at-Arms has a participation role in meetings, as prescribed by the Ritual, and other defined job descriptions. The SA should be familiar with all elements of the opening and closing ceremony that require his/her participation and/or leadership.

Other duties of the Sergeant-at-Arms may include: Providing storage of physical items between meetings that include, but are not limited to, flags, Bible, lectern, audio/visual equipment and other, as may be directed by the Commandant.

- Participation on the Detachment membership committee
- Advisor to Commandant and/or Board of Trustees on potential problems
- Assistance to Commandant and Judge Advocate on problem issues
- Providing sign in sheets for guests and members attending meeting
- Assistance to Paymaster as needed, particularly where cash transactions are involved
- May be designated as the "Color Guard Commander" for parades and ceremonies
- May be assigned to coordinate ceremonial honor guards, rifle squads and joint Color Guard activities

## **D. Summary:**

The Sergeant-at-Arms plays a key role in the orderly conduct of meetings beginning with the physical set-up, assuring that items required for the meeting are on hand and assisting with maintaining order during the meeting. The SA also can help set the "tone" of the meeting by making sure guests and new members are properly introduced and made to feel comfortable before, during and after the meeting. The SA also assists with membership by providing applications to prospects (and selling them on the Detachment and the League) and providing sign-in sheets (to include name, email address, mailing address and phone #) so that guests and prospects can be contacted in the future.

# MARINE CORPS LEAGUE VETERANS AFFAIRS VOLUNTARY SERVICE OFFICER

What is the Veterans Affairs Volunteer Service (VAVS)? It is best answered that it is a program administrated by the VA in which individuals, organizations such as Marine Corps League, Veteran Foreign Wars, American Legion, etc. and corporations are encouraged to participate. The Marine Corps League's program is to be a participant in the VA program under their management, procedures and guidelines.

- The program, reduced to its lowest denominator, is simply Veterans and Friends of Veterans helping Veterans.
- Volunteers are needed at the VA Hospitals and Clinics throughout the state. A wide variety of volunteers are required. A few, but not all-inclusive by any means are escorts, information, drivers, administrative, history, recreation, receptionist, telephone operator, and dementia unit.

## **Volunteers are categorized into three basic groups:**

(1) Regular Service, (2) Occasional and (3) Youth

1. The Regular Service group is by far the largest and receives training, screening and indoctrination. It sounds complicated. It isn't. It only takes about 2 hours.
2. Occasional volunteers are those volunteers who are not regular service but volunteer occasionally for special events such as bingo, Christmas, Veterans Day, special events, etc.
3. Youth volunteers are ages from 13 to 19 and receive the same training as Regular Service. Youth volunteers are eligible for the James H. Parke Memorial Youth Scholarship, which goes up to \$10,000.

**Note:** It is emphasized that Marine Corps League volunteers do not have to be members of the Marine Corps League, Marines or family members. They only have to be recruited by the Marine Corps League or request that their hours be credited to the Marine Corps League.

Naturally, a large National volunteer program requires organization and procedures.

## **Here is how the V.A.V.S Program works in the Marine Corps League:**

1. Each VA Hospital is authorized one VAVS Representative and three Deputy VAVS Representatives.
2. All VAVS and Deputy VAVS Representatives are appointed by the National MCL VAVS Representative.
3. Detachment Commandants submit certification/recertification Request form for MCL Members' to the National Marine Corps League VAVS Representative requesting that a person be appointed to a vacancy or to replace a current representative.

4. The National MCL Representative makes the appointment and notifies the individual appointed and the respective VA Hospital.
5. The VAVS and Deputy VAVS Representatives attend 4 meetings a year at their respective VA Hospitals and keep their Detachment Commandants informed about VA Hospital activities and volunteer procedures. Like everything else, it starts at the Detachment level. Once started, like all other programs it must be maintained, supported and promoted. The key to success is always Detachment participation.

## **PUBLIC RELATIONS OFFICER**

It appears that the Marine Corps League is one of the best kept secrets in the Marine Community. One of the important aspects for recruiting members is getting publicity about the League published. Perhaps the most cost effective way is by using news releases about Detachment activities, meetings, and events. Contact with newspapers and other media can draw attention to the Marine Corps League, and create positive visibility in the Community. This is important for attracting members, and for attracting funds and donations for Detachment programs.

The Public Relations/Information Officer can be a major factor in advertising the Detachment by maintaining a continuing stream of information flowing to the newspapers for articles, events calendars, and accessing radio and TV with public service announcements (PSA).

NOTE: In lesson plan 7 the subject of Public Relations is covered in more detail. This will provide you with many insights on how to improve the effectiveness of the PR Officer.

## **CHAPLAIN**

The Chaplain plays an important roll in tending to the needs of the members and members families, particularly during periods of distress, illness, and/or death. It is every member's responsibility to keep the Chaplain informed of situations and issues of need within the Detachment. In addition, the Chaplain is called upon to offer invocations and prayer for meetings, initiations, installations, and for ceremonies. The Chaplain may be called upon to participate in funeral services, and make visitation to members/families that are sick, or who have lost a loved one. In addition, the Chaplain may be required to assist in funeral arrangements (to include contacts for the Marine Corps Honor Guard) and/or publicize needs of the sick (to include blood donations, etc.)

The Chaplain's job, as a primary representative of the Detachment, is to provide comfort and special service to members and families in time of need. This support should go beyond members and family, it should include the entire Marine Corps community (current or veteran Marines) within the Detachments' geographic area. This may necessitate reviewing obituaries, or having hospitals

make contact when a Marine is admitted. He/she should inform other members of the Detachment, of situations where support is needed. Officers and Detachment members should support each other during these times of distress; it's part of the old adage "Marine's take care of their own."

**A. Performs Duties of a Spiritual Nature:**

The term Chaplain implies the providing of support to individuals and groups for spiritual or religious guidance and in every aspect of League objectives, purposes, initiations, ritual, and references to God. It is not expected that a Detachment Chaplain be schooled in theology, but it is expected that the Chaplain will provide support to those in need, and provide prayer for meetings and ceremonies, (either as provided for in the MCL ritual or as developed to meet the situational needs). The "Bottom Line" to providing service, as a Chaplain is the "Golden Rule" - "Do unto others as you would have them do unto you." Simply stated, it's how you would want to be treated if you were in a distressed situation.

The Chaplain needs to respond to needs and wishes, offer comfort, and provide advice and counsel where needed.

**B. Visit Sick Members or Families/Correspond Appropriately:**

Make every effort to visit members, or members' families, who are incapacitated.

He/she should make the Detachment Officers and members aware of the situation, and solicit participation. A card of well wishes should be sent to the individual on behalf of the Detachment. The primary purpose of visitation and correspondence is to let the individual know that they are being thought of, that they are missed, that they are important, and that they are a part of the Marine Corps family. Advice, counsel, warm wishes, words of comfort, and appropriate kidding are all part of support.

**C. Abide By the Ritual of Office:** The Marine Corps League RITUAL is comprehensive in addressing the situations in which the Chaplain may be asked to participate. Again, he/she may be innovative in developing prayers or statements that suit the purpose of any given situation. For situations not covered, the Chaplain should improvise and treat each situation with respect for the office. The RITUAL of the Marine Corps League provides for services honoring members, and they should be offered. If accepted, the Chaplain should take charge of coordinating such services with the family, funeral director, and Detachment members. The Chaplain may need to assist with finding a DD 214 for a casket flag, and for a Marine Corps Honor Guard.

The same assistance and support should be offered to Marines or Marine families who are not members of the League. Our purpose is to support Marines, and membership is not a requirement for assistance in time of need. The Chaplain

fulfills a role of assisting and supporting a family in any way possible, and should be able to call on Detachment members for assistance when necessary.

**D. Provide Notification to Department and National on Deceased Members:**

The "Death Notice" form will be in four parts: Detach and retain the bottom copy. Forward the balance to the Department Chaplain. The Dept Chaplain will retain the bottom copy and forward balance to National HQ "Attn: Membership" National HQ will forward to the National Chaplain. This form should be completed and transmitted immediately upon notification of a member who is deceased. In addition to other administrative reasons, deceased members are honored with a memorial service at Department, Division, and National meetings and their names are listed in the Marine Corps League magazine.

**E. Provide Invocations and Services as Required:**

As a part of the opening and closing ceremonies at business meetings, the RITUAL provides for the opening and closing of the Bible, and for an invocation and benediction. The Chaplain may use the words of the RITUAL, or offer other appropriate prayers at the meeting. The Chaplain may also be called on to render a prayer at ceremonies, joint Veterans observances, and/or special events (such as the Marine Corps Birthday Ball). As indicated above, the Chaplain may also need to prepare and coordinate services for a deceased Marine.

**F. Perform Duties as Requested by the Commandant:**

While most of the duties of the Chaplain have been described above, the Commandant may request the Chaplain to attend, participate, and/or coordinate an event not listed. This might include community ceremonies, dedications, or other special events.

**G. Summary:**

A major focus of the Chaplain should be on contingency planning for events that may arise. It is better to be prepared for an eventuality than have to scramble at the last-minute when the event is about to occur. The Chaplain plays a key role in meetings, ceremonies, and other events, reminding each of us about our reliance on Divine Providence. And the Chaplain is the "Point Man" for providing assistance and support, aid and comfort, to Marines and Marine families in need.

He/she requires the support of every member in effectively carrying out his or her responsibilities, especially in times of distress.

## **DETACHMENT ADJUTANT**

The Detachment Adjutant is the corporate/recording secretary for Detachment meetings and affairs. In addition, the Adjutant provides support to Detachment Officers and project leaders through correspondence, documentation, written communication, media releases, and other staff assistance. The Adjutant, by direction of the Presiding Officer:

- May prepare agendas for meetings.
- Record member participation and attendance, prepare and monitor the calendar of events for the Detachment.
- The Adjutant is also responsible for official notifications to the members.

### **A. Installation Report:**

The Adjutant shall prepare the report and makes sure the installing officer signs it.

The installing officer is responsible for making sure the report is made out, but it is the adjutant that should prepare the form.

Once the Installation of Officers has taken place, the Adjutant mails three copies of the report within 15 days following the installation to the Department Adjutant.

**Note:** Election of Officers must be held between **September 1 and May 15** of each election cycle. Installation of Officers must be conducted no later than the last day of the month subsequent to the election the report of the installation (ROI) must be forwarded within fifteen (15) days of the installation to the Department Adjutant.

### **B. Keep Accurate Minutes Of Meetings:**

The purpose of recording minutes at meetings is to keep accurate records, for review and audit, of activities and decisions made on behalf of the Detachment. Members and officers memories are best served with a written commentary on meeting events, reasons for decisions and actual actions taken. For some decisions, the record is required for legal reasons both state corporate requirements and for League audit purposes. The presence of minutes and records is indicative of organization and providing information for future use within the Detachment.

Minutes may be kept in writing, shorthand, or by use of recording device. It is not important to write every detail, but salient points of discussion and actions taken are necessary.

Minutes should be transcribed to permanent records immediately after a meeting as taken place. Information or other factors appropriate for recording will still be in the Adjutant's memory when done immediately following the meeting.

Minutes and records should be transcribed into a book or binder that passes to each succeeding Adjutant for the Detachment.

Periodically, the Adjutant may want to include an index of topics

(i.e. annually), for easy reference in the future. The records should be maintained in chronological or reverse order and include meeting date, location, type of meeting, officers present, and members present if appropriate.

### **C. Assure That Resolutions Are Maintained As Corporate Records:**

The minutes of meetings, particularly resolutions (decisions made that affect how business is to be conducted, amendments/changes to by-laws and other decisions regarding finances and programs), must be maintained as a permanent record of the Detachment's activities and according to Detachment procedures. Incorporate and establish their own written by-laws, policies and procedures within that framework.

### **D. Characteristics and Traits**

- Ability to accurately record resolutions and carried motions of the Detachment.
- Ability to accurately record minutes of meetings
- Ability to organize information and maintain and file records/archives.
- Attention to details and capability for recall of information.
- Ability to print/write legibly, type and/or utilize computer for permanent Detachment records.
- Capability for assembling information and providing officers and members data regarding Detachment actions, programs and listings.
- While not mandatory, a computer and computer skills (particularly word processing) are extremely helpful for this job.

## **DETACHMENT PAYMASTER**

### **A. Maintains Detachment Financial Records:**

The Paymaster is responsible for maintaining and providing for review upon request from the Detachment Board of Trustees, Audit Committee, and/or Department/National offices, all financial records and reports for the Detachment. Such records normally include records of revenue receipts, expenditure records, checking and financial account statements and summary reports of financial condition (balance sheet, profit and loss, cash flow, etc.). As a matter of practice, reports of financial condition should be made and reviewed by Detachment officers and/or membership on a scheduled periodic basis.

### **B. Acts As Controller Of Detachment Funds:**

Shall keep a true record of all monies received and expended by the Detachment and, in close operation with the Adjutant, prepares up-to-date record of dues paid by the membership and forwards notices to members of their dues who have lapsed and also such other duties as may be assigned to him or her by the Detachment Commandant. On the Detachment banking accounts, the Paymaster should always be the primary signer.

The Paymaster is responsible for paying authorized bills, assures the legitimacy of payment requests, budget and/or board of trustee's approvals, prior to releasing funds for disbursement. He/she is also responsible for assuring that proper documentation accompanies requests for payments in the form of invoicing/billing, receipts and approval. This office acts as the policeman for outflows and expenditures on behalf of the Detachment's membership. He/she, therefore, has the right to question expenditures, if necessary, not clearly understood by budget or board of trustees. The Paymaster should always present a question to the Board of Trustees if there is any doubt about disbursement.

### **C. Makes Fiscal And Financial Reports At Meetings:**

Keeping officers and members informed as to financial status is important to establishing and maintaining credibility within the organization. The presiding officer should call on the Paymaster for a report at each business meeting. This report should summarize financial transactions since the last meeting and provide a balance of accounts. It is suggested that at least quarterly the Paymaster report to the Board of Trustees in more detail on account status, and provide balance sheet, profit and loss and cash flow data in writing. By doing so, the officers are aware of status and trends in determining requirements for revenue and/or changes in expenditures.

### **D. Receives Dues And Forwards Transmittals:**

This job can be shared by the Adjutant, or handled by the Paymaster in its entirety, based on practicality and Detachment practices and procedures. It is extremely important to handle dues and membership transmittals in an expeditious manner this will be the first impression a new member has of the Marine Corps League to assure timely receipt of the member's card and lapel pin. Dues should be transmitted no less than once per month, preferably following a membership meeting, or other such time each month in which the preponderance of members normally join.

It is equally important that the transmittal forms are done accurately and the money is forwarded in compliance with Department and National procedures. It is important to review the transmittal instructions, as well as any procedures and policies, distributed by Department and National. This will help assure the goal of timely response for membership cards and pins.

### **E. Handles Tax And Licensing Functions:**

Because each Detachment should be incorporated within the state, there will normally be annual forms to be completed from State and/or Federal tax agencies. These forms will request financial data regarding revenues and disbursements and their primary purpose is to assure that the organization is conforming to the articles of incorporation for a Veterans non-profit organization. The Paymaster is responsible for completing and filing the required information accurately and timely.

## **DETACHMENT ADJUTANT/PAYMASTER**

Some Detachments may choose to combine the officer jobs of the Adjutant and Paymaster. This does not diminish the requirements for either job. The characteristics, accountabilities, and responsibilities are all combined into one. Therefore, the combined descriptions from above apply.

END OF LESSON PLAN 1

