



Department of North Carolina

Dennis Mathias
 5323 Courtfield Drive
 Indian Trail, NC 28079-5124
 DCMathias@aol.com – 704-451-1397



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To: Marine Corps League National COO Bob Borke
 From: Dennis Mathias, MCL Member, Life#: 39636

Subj: **Proposed Amendment to the National Administrative Procedures, Chapter Seven, Section 7055.**

In accordance with the Administrative Procedures Chapter Ten, Section 10020, the following is submitted for consideration by the body assembled at the 2023 National Convention.

CURRENT SECTION 7055

Section 7055. Certification of Life Members. Each Detachment will annually audit its participating Life Members as shown on the Quarterly Member Listing of 30 June each year. Following the audit, the Detachment will annotate a copy of the Quarterly Member Listing with appropriate remarks to show additions, deletions and other adjustments. Each adjustment will include the reason, and whenever possible, will cite supporting documentation (i.e., Dues Transmittals, Transfer Forms, etc.) to assist in correcting the records in National Headquarters. The annotated Listing will be certified to be correct as annotated by the Detachment Commandant and the Detachment Adjutant/Paymaster (or Paymaster) and will be returned to the National Adjutant/Paymaster at National Headquarters through the Department no later than 31 December following its receipt. No funds from the interest on the Life Member Fund will be distributed to a detachment until the certified listing is received at National Headquarters. Should a Detachment fail to submit the annual Eligible Life Member Audit by 31 December of a given year that Detachment's quota of the interest distribution shall remain in the blocked fund.

HIGHLIGHTED SEGMENTS TO BE CHANGED

Section 7055. Certification of Life Members. Each Detachment will annually audit its participating Life Members as shown on the **Quarterly Member Listing of 30 June** each year. Following the audit, the Detachment will **annotate a copy of the Quarterly Member Listing** with appropriate remarks to show additions, deletions and other adjustments. Each adjustment will include the reason, and whenever possible, will cite supporting documentation (i.e., Dues Transmittals, Transfer Forms, etc.) to assist in correcting the records in National Headquarters. The annotated Listing will be certified to be correct as annotated by the Detachment Commandant and the Detachment Adjutant/Paymaster (or Paymaster) and will be **returned to the National Adjutant/Paymaster at National Headquarters through the Department** no later than 31 December following its receipt. No funds from the interest on the Life Member Fund will be distributed to a detachment until the certified listing is received at National Headquarters. Should a Detachment fail to submit the annual Eligible Life Member Audit by 31 December of a given year that Detachment's quota of the interest distribution shall remain in the blocked fund.

PROPOSED SECTION 7055

Section 7055. Certification of Life Members.

- a. If a procedural change improves auditing of Life Members (PLM Audit), the National Office is authorized to revise and disseminate the changed procedures to the departments and detachments. The National COO is then to propose an amendment to this section that documents the procedure and submit it for review and approval at the next National Convention.
- b. If no procedural changes are made:
 - (1) The National Office shall prepare a Life Interest Check Edit List for each detachment before September 1 each year. This list will be grouped by department and emailed to each respective department. The department will forward the detachments' list to the respective detachment before September 15 of that year.
 - (2) The Detachment will make the necessary corrections to their list, following the instructions provided by the National Office. Any corrections to their list will include the reason, and whenever possible, will provide supporting documentation (i.e., Dues Transmittals, Transfer Forms, etc.) to assist in correcting the records in National Headquarters.
 - (3) The corrected Audited Listing list will be certified to be correct when signed by the Detachment Commandant and Detachment Adjutant/Paymaster (or Paymaster).
 - (4) The Detachment, having signed their Audited Listing, will follow the instructions and send (mailed or emailed) the Listing together with all referenced documents including any Notice of Death forms to the designated office(s) by the deadline noted in the instructions.
 - (5) The Department Paymaster will follow the instructions from the National Office to get all Detachment Audit Listings and attachments to the National Membership Manager by the defined deadline.
- c. No funds from the interest on the Life Member Fund will be distributed to a detachment unless the certified listing is received at National Headquarters by the deadline. If a Detachment fails to submit the annual Eligible Life Member Audit by the deadline, that Detachment's share of the interest distribution shall remain in the Life Member Blocked Fund.

CHANGE RATIONALE:

1. This change breaks up the procedure into steps that can be easily followed.
2. There is no National Adjutant/Paymaster.
3. The FY end report is not always dated June 30 and it is no longer used for the PLM Audit.
4. If the detachment sends their audited PLM List to the department in adequate time and the department misses the December 31 deadline, the detachment will not receive any PLM distribution. Same result if the detachment sends their listing to the department on December 30 and the list is not forwarded in time.
5. From one year to the next, the procedures might change as more functionality is added to the National Database system. The procedures might be improved mid-year, but the NAP's procedures proscribed in this section would not enable any change until the NAP is amended at the Convention. This amendment allows the National Office to implement changes in the PLM Audit procedures as soon as the National Office is ready to implement them and propose amendments to the NAP at the next National Convention.

6. The changes in use were implemented in 2021 and since then the PLM Audit has not strictly followed the NAP. Detachments now are allowed and encouraged to email their list to the Department AND the National Office.

Respectfully Submitted,



Dennis Mathias

Department of North Carolina District Vice Commandant

Charlotte Detachment 750 Life Member