

2nd BATTALION, 4th MARINES ASSOCIATION, INC.

OPERATING POLICIES

8 May 2018

Whereas the bylaws of this Association are considered its' operational document, these operating policies will reflect day-to-day subjects not normally included within the bylaws.

CONTENTS

<u>SUBJECT</u>	<u>PAGE</u>
Advertising For Members	1
Annual Billing	1
Association Awards	1
Wild Bill Weise Magnificent Bastard Award	1
Association Awards to The Battalion	2
LtCol Joseph R. "Bull" Fisher Award	2
SgtMaj Joseph J. Ellis Leadership Award	2
SgtMaj "Big John" Malnar Award	2
HMCS Walter S. "Doc" Gorsage Leadership Award	3
Foster, Paul and Barker Award	3
Book List	3
Corporate Notes	4
Dues & Fees	4
Elections	5
Expenditures of Funds	5
Funerals	6
Membership Processing	6
Posting Meeting Minutes	8
PX	8
Reunions	8
Hosting a reunion	9
Getting started	10
List of things to do	11
Sea Horse Newsletter Fee For Hard Copies	16
Website	16

Advertising For Members

The Association will not put advertisements or notices out via electronic means or hard mail on behalf of a member having a business and desiring /requesting that we do so.

Annual Billing

The annual membership cycle runs 1 July - June 30. Dues for the following year are considered delinquent on July 1 of each year.

The following steps will be observed to alleviate delinquencies as much as possible:

- No later than 20 April each year, the Membership Chairman will generate a list of annual dues members for collection for the Secretary with a copy to the Newsletter Editor.
- The Secretary, upon receipt of this notification, will prepare and mail a letter of notification to all annual members via the U.S. Postal Service and electronic communications. This will allow sufficient time for all to focus on dues to be collected between May and July.
- The Secretary will provide the Newsletter Editor a brief reminder of notification to be published concerning delinquent membership.
- The Newsletter Editor will ensure this notification is published in the next Sea Horse requesting the payment of dues by 30 June of the current year.
- On 1 August the Membership Chairman will notify the Secretary of those members whose dues have expired.
- The Secretary will generate a reminder notice and distribute it in the same manner as the original notice.
- All monies required will be provided to the Treasurer.

Association Awards

Wild Bill Weise Magnificent Bastard Award

This award, established in honor of former Battalion Commander, BGen William "Wild Bill" Weise, USMC (Ret), is to be awarded annually to an association member having contributed significantly to the Association during the past year. Candidates for this award are to be voted on by the Board one month prior to the Annual Reunion.

Individual award given: USMC pin with wreath and ruby. The Secretary will keep a supply of these handy.

Association Awards to The Battalion

All the award recipients below are chosen by the Battalion on an annual basis. The Association pays for these awards and has representation at the awards ceremonies to help make the presentations. Awards given are generally plaques, NCO swords or knives as mentioned under each award. Navy Commendation Medals and certificates may also be presented by the Battalion, as the Battalion Commander desires.

LtCol Joseph R. "Bull" Fisher Award

Presented to a 2/4 commissioned officer best displaying superior leadership and motivation.

LtCol Fisher was the Battalion Commander during the several battles in Vietnam including Operation Starlite and Operation Harvest Moon. The moniker, "Magnificent Bastards," was first used by LtCol Fisher the day he assumed command 4 June 1964. On 24 September 1966, Battalion Order 5600.1B was signed to reflect the addition of the lower pennant on the battalion crest saying, "Magnificent Bastards."

Individual award given: Wall plaque to mount officer's sword

SgtMaj Joseph J. Ellis Leadership Award

Presented to the Staff Non-Commissioned Officer best demonstrating the leadership qualities of SgtMaj Ellis.

SgtMaj Ellis was the 2/4 Sergeant Major when KIA in Anbar Province, Iraq, on 7 February 2007.

Individual award given: NCO sword with wall plaque to mount sword

SgtMaj "Big John" Malnar Award

Presented to the Non-Commissioned Officer best demonstrating the leadership qualities of SgtMaj Malnar.

SgtMaj Malnar served in the Marine Corps from 1943 until his death during the Battle of Dai Do, Vietnam, on 2 May 1968. "Big John" received two Silver Stars, two Bronze Stars w/ Combat "V" and four Purple Hearts from his service in Korea and Vietnam prior to his death.

Individual award given: NCO sword with wall plaque to mount sword

HMCS Walter S. "Doc" Gorsage Leadership Award

Presented to the 2/4 corpsman best demonstrating the leadership qualities and capabilities of HMCS Gorsage, and in honor of all Navy corpsmen killed in action while serving with the 2nd Battalion, 4th Marines.

Doc Gorsage spent more time serving with Marines than sailors. He had tours of duty in all three active duty divisions and many of their regiments. He served 2/4 during some of the heaviest fighting of the Vietnam War 1967-68. His coolness and competence under fire inspired confidence in sailors and Marines of all ranks.

Individual award given: K-Bar fighting knife with plaque to mount knife

Foster, Paul and Barker Award

Presented to the junior enlisted Marine from the ranks of Pvt, PFC and LCpl best exemplifying the future of the Marine Corps by upholding and demonstrating Corps values of honor, courage and commitment.

Sgt Paul Foster, LCpl Joe Paul and LCpl Jedh Barker all received Medals of Honor posthumously for their actions in Vietnam while serving with 2/4.

Individual award given: K-Bar fighting knife with plaque to mount knife

NOTE 1: All individual awards will be inscribed with the name of the award, the recipient's rank and name.

NOTE 2: The recipients' names will be engraved on their respective, permanent plaques displayed in the battalion headquarters building.

Book List

The association web site shall contain a recommended Book List for members. Books will not be promoted for the purposes of advertising a particular author, but will reflect those books written in the best interests of the 2/4 Association and Marine Corps. It is intended that these books be viewed as an educational tool for members.

Book topics written by 2/4 Association members or others should address, in whole or in part, the history of the 2nd Battalion, 4th Marines, iconic books that are of interest to Marines, and Marine related books whose purpose is to raise money for Marine based charities.

This Book List is not intended to replace the annual Commandant's Reading List. Rather, the goal is to provide information to association members with respect to books of which they might not otherwise be aware.

The books presented on the Book List will, at a minimum, be listed by title and author, a brief synopsis of the content, number of pages and the expected price [hard back, soft cover and electronic book], if available.

The President shall appoint one Director and two other association members to serve as a standing committee for the Book List. This Director shall serve during the length of his or her elected term; the two members shall serve at the pleasure of the selected Director. Books recommended for inclusion on the Book List shall be reviewed and voted upon by the standing committee. The committee shall vote for the inclusion of the book within one month of receiving the recommendation. If the book receives a majority of two [2] votes, the book shall be added to the web site Book List.

Corporate Notes

The Association is incorporated in the State of Maryland. As such, all financial reporting required must go through our "Resident Manager" who lives in or near the State of Maryland. This person may be a member or otherwise designated by the Board. For example, if the Treasurer needs to request an extension for the preparation of the association's tax return, the Resident Manager will accomplish this on the Treasurer's behalf.

Dues and Fees

Annual Memberships For Non-Active Duty Personnel - \$50.00

Life Memberships For Non-Active Duty Personnel:

- Age 54 and under: \$200.00 (Lump sum or two [2] payments of \$66.67 each and one payment of \$66.66)
- Age 55-64: \$150.00 (Lump sum or three [3] payments of \$50.00 each)
- Age 65 & over: \$100.00 (Lump sum or two [2] payments of \$33.34 each and one payment of \$33.32)

Life membership may be paid in three [3] installments over a period not to exceed nine [9] consecutive months. It is the responsibility of the applicant to schedule their multiple payments. The Association will not send reminders or invoices. If the applicant fails to pay the full life membership amount defined above, amounts paid and received towards life membership will be converted and credited as annual membership dues.

Annual Memberships For Active Duty Personnel:

- E-1 through E-5: \$5.00 per year
- SNCO and Officer: \$10.00 per year

Life Memberships For Active Duty Personnel:

All personnel: \$175.00 (Lump sum or two [2] payments of \$58.34 each and one payment of \$58.32.

Fees for active duty life memberships may be paid in three [3] installments, but must be completed within nine [9] consecutive months. It is the responsibility of the applicant to schedule their multiple payments. The Association will not send reminders or invoices. If the applicant fails to pay the full life membership amount defined above, amounts paid and received towards life membership will be converted and credited as annual membership dues.

Deceased Members:

If a life member passes on, his spouse is considered to have inherited his life membership until his/her death. If the deceased member is an annual member, his/her spouse may continue a membership on that basis.

Elections

In order to maximize the participation of members during elections, nominations for elective offices as cited in the bylaws will be conducted during the second half of the Association's fiscal year [January - June]. The election for officers will be conducted utilizing electronic communications and the U.S. Postal Service as applicable. A suggested schedule of events are as follow:

Selection of Nominating Committee Chairman - 1 February
Solicitation of Membership of Election Committee - February/March
Completion of Nominees - 30 March
Nominees submitted to Secretary - 15 April
Announcement of candidates in Seahorse - 1 May
Election Begins through electronic notification to membership/hard copy mailed - NLT 7 May
Election closed - NLT 7 June

The installation of these officers will be during the first reunion to be held after said election. Results of elections will be made public in both the Sea Horse newsletter and on the web site.

Expenditures of Funds

Members of the Board may spend or be reimbursed up to \$500 without vote by the Board. Any amount over \$500 must be approved by a majority vote of the Board. Receipts in either case will be required to be presented to the Treasurer as soon as possible after the expenditure.

Funerals

The sending of flowers for funerals or other similar events is not feasible from a fiscal standpoint. The Association will only send a condolence card to the surviving family. The Association may, however, ask members to consider a donation as they personally deem appropriate.

Membership Processing

Dues Cycle:

- Annual billing. The membership cycle runs from 30 June to 30 June each year for annual memberships. The billing of annual dues will occur during the early part of April of each year. A copy of the roster will be sent to the Secretary for his use.
- Billing reminder. A billing reminder will also be sent to late and lapsed members by the Secretary in August. Talk to him the month before these months to see when he will be ready to bill in April and August. It is important to use the association logo at the top of all correspondence, online and/or snail mail. This helps to verify to prospective members the Association is a valid entity.
- Verification of roster: The Membership Chairman or his/her agent will do this, but if an agent is used, that person must be contacted first to check to see about their availability. This is a very time consuming job to call each member on the roster verifying all their information. Many people do not let us know when they have changes of their contact information. This is sometimes done twice a year, but at least once during the month of March before billing to prevent errors in mailing dues notices and to keep the roster current.
- Looking up missing members: Try using www.zabasearch.com (premium) in looking for members. A big key in research is the middle initial or middle name. In some cases if one is looking for a Jose Gonzalez in LA or Chicago and the other larger cities it is basically hopeless for the most part, but with the middle initial or name there is a greater possibility of success. Also try www.whitepages.com and Google as well. Obituaries may also be researched.

- Receiving membership applications online [3 step process]. If an application is submitted via the internet, the Membership Chairman, Secretary and Treasurer will get a copy. A confirmation e-mail will then be sent to the applicant by the system. On that confirmation e-mail will be a place to pay dues via PayPal or similar online payment system. The applicant will complete the three step process by entering his/her payment information and submitting it.
- Receiving membership applications via snail mail. If the application was submitted via snail mail, only the Treasurer receives it along with a check. In this case, the Treasurer is to send the Membership Chairman a copy of the application as soon as possible for processing.
- Processing membership applications. Membership cards will be pre-printed with the member's name and date issued left blank. They will be printed with the Membership Chairman's signature. The Membership Chairman will prepare a membership card for the new member and update the roster.
- Awards identified on membership applications. Notify the Web Sergeant of any new member having indicated they have the following awards: Medal of Honor, Navy Cross, Silver Star, Bronze Star and/or Purple Heart. These are entered on the web site Wall of Honor.
- Membership card colors. These are for identifying number of life, paid annual, not paid annual, and members who didn't actually serve.

Aqua - life members [Note: These cards should be laminated, if possible]
 Green - paid annual
 White - unpaid annual [Note: this helps if you need to call to remind them of their dues, verify information, etc.]
 Yellow - members who didn't serve with 2/4 [Note: these can't exceed 25% of the total membership per IRS regulations for our non profit status]

Note: Using the different colors on the roster are helpful when making a report or a count of each is requested.

- Upgrading memberships. Any member desiring to upgrade from an annual to life membership should so indicate to the Membership Chairman. A new membership card will be sent accordingly. The Secretary, Treasurer, Newsletter Editor and Web Sergeant should be notified in order that they may update their roster.
- Passing of a member. When a member passes away, notify the Web Sergeant. He will move his/her name to the In Memoriam list on the web site. If a life member was married, the Membership Chairman will contact the spouse and ask if she would like to inherit her husbands life membership. If yes, the roster is updated accordingly and a life membership card is sent to her.
- Reimbursement for expenses. Keep receipts and send to the Treasurer for reimbursement as desired. Expenses may include paper, envelopes, stamps, laminate sheets, and ink cartridges.

Posting Meeting Minutes

To allow members to be more aware of what occurs at the annual meetings, the Secretary will post via the Web Sergeant the minutes of both the board and general meetings, to include the fiscal report from the Treasurer. This will occur after each reunion.

PX

At the 2013 Board meeting during the Philadelphia reunion, the Board voted to suspend PX operations due to high cost and low participation. Hosts of annual reunions, however, may elect to purchase t-shirts, favors, etc. to be sold at their reunions with the concurrence of the Board of Directors.

Reunions

In order to maximize reunion attendance, a list of registered attendees will be posted and updated as time allows on the web site for others to view. During the reunion, the latest list of attendees will be posted in the hospitality suite. Additionally, after each reunion, a final list of attendees will be posted on the web site and in the Sea Horse for all to see. This information will come from the Treasurer and be posted respectively by the Sea Horse Editor and Web Sergeant.

During the annual reunion memorial service, the names of those association members having passed away for any reason during the past year will be read by the Chaplain or other designated person to commemorate them appropriately.

Hosting A Reunion

So, you are thinking about hosting a reunion? How do you get started? Here are some tips to assist you in making that decision and how to go about it.

First and foremost, it is essential that you have the time to do all the things that are required to host a successful reunion. If you are committed to other clubs and organizations which may take more time than you anticipated, it might be wise not to take on an additional task of a reunion. It all depends upon how organized you are.

Second, when is the best time to hold a reunion? Generally, this would be some time between late June and early August. This is due to some members having children or grandchildren in school and, to some extent, work schedules.

Third, what would the reunion have in the way of events? Typically, we have:

- Tours of interesting places; i.e, historic battle sites, historical military museums, museums in general, etc.
- A picnic or an evening social such as a dinner with no host cocktails. Picnics could be held in conjunction with a tour. Evening socials could be held at the headquarters hotel or, better yet, at some restaurant.
- A memorial service, again usually tied in with a tour.
- An annual meeting scheduled for at least an hour. It can be held in conjunction with a tour or on a morning not having something else scheduled.
- A banquet which would consist of a cocktail period followed by dinner, remarks from a guest of honor and raffle.

Lastly, time lines on which to make your plans is essential to getting everything done in time.

Getting Started

Contracts. Making contracts with the hotel, banquet facility and transportation company, as necessary, is essential to be completed no later than 31 January in order that the registration form is ready for publishing in the association newsletter, on the web site and any special mailings required.

Publicizing. It is also necessary to get the word out to the various veteran organizations as early as possible, but no later than 31 December. They need long lead times for their respective publications which are monthly and quarterly. All you need for them to publish is: name of reunion, dates of reunion, location of reunion and the name of point of contact with phone number and e-mail address.

Hotel. This should be negotiated as early as possible. Contractual items should include: number and type of rooms; i.e., kings, queens, doubles, smoking and non-smoking, and handicapped; the Saturday night banquet room and meal plus no host bar; hospitality suite or room [preferably a complimentary setup] with the right to have snacks and beverages of all types in that room; and, meeting rooms for both board and general meetings. The 2/4 Association Board of Directors should have the opportunity to review the proposed contract before you sign it. There may be something that you miss that they will see, which protects you, the Association and the hotel.

Saturday night banquet. If the banquet is to be held in a place other than the hotel, this must be negotiated. Remember to include a no-host bar, podium and microphone. It is also important to come up with a guest of honor early on. The Association usually picks up the cost of their room and meals, so this must be incorporated in your budget planning.

Transportation contract. This should be negotiated for any transportation required for tours and trips to/from the hotel.

Reunion shirts. Our Treasurer generally takes care of contracting for reunion shirts, but it is important to coordinate with him in order that the types and prices of shirts are available to put on the registration form.

Registration packets. Once the items above have been taken care of, it is important to set up a spread sheet for keeping track of attendees and what they have paid for in the way of meals, shirts, transportation, etc. It is recommended that you keep a file folder on each person in which you can put a schedule of events, their tickets, information of the area, an area map(s), things to do during free time, etc. When they check in, these folders can be handed to them.

Getting the word out. Connect with the most recent reunion host to get their information on how best to put the word out to the veteran community.

Signage. If the hotel is willing, ask them for permission to put a welcome on their marquee outside, and also banners or posters inside the hotel telling attendees where to go for various events. A registration desk in the lobby would be helpful.

Miscellaneous. You can tailor make a check list of things you need to do from the list provided below. You can never be too organized. Do not take anything for granted. Double check things so that you won't be surprised at the last minute. Remember the 7 "P's." Proper Prior Planning Prevents Piss Poor Performance. Also, have a good time and don't let things overwhelm you. Others can help when you need them. Don't be afraid to ask.

Once you commit to the process you will, of course, want to make it a memorable one. It is best if you form a committee to assist you. This committee may consist of other association members you know, family members and/or friends living in your area. While it is possible to do everything yourself, it is easier to have help so that you can focus on the overall task. A check list is presented below to offer ideas on what needs to be accomplished.

List of Things To Do

Time Lines:

- December - Complete contractual process with hotel for room block and banquet.
- December - Complete planning for reunion shirts; i.e. design, supplier, types of shirts and prices.
- January - Complete registration form, and submit to the Sea Horse Editor and Web Sergeant for putting out to membership.
- April - Complete ordering for shirt order.
- June - Sign ups completed.

Hotel Accommodations:

- Decide upon hotel to use
- Reserve block of rooms [king, queens, doubles, handicapped, smoking, non-smoking] and make a contract with the hotel keeping cost in mind
- May need to reserve a room for the guest of honor [paid by Association]
- Ask for complimentary hospitality suite
- Ask for permission to have snacks and beverages in hospitality suite
- Suggested snacks and beverages for hospitality suite [not locked in stone]:
 - Beer & non-alcohol beer
 - Wine - cabernet & chardonnay
 - Ice - hotel
 - Water - hotel
 - Sodas - Coke, Diet Coke, Pepsi, Diet Pepsi, 7-Up, Diet 7-up, tonic
 - Platters of cold cuts, rolls, paper & plastic, and condiments [if desired for one day only - maybe Wednesday evening]
 - Chips & dips - Ruffles, Saltitas, salsa, southwestern, ranch
 - Nuts - almonds, cashews
 - Pretzels
 - Wine opener
 - Plastic cups
 - Napkins
 - Liquor - Jack Daniels bourbon, Famous Grouse scotch
- Ask hotel for a room to hold a board and general meeting
- Speaker/microphone system for meetings

Banquet:

- Work with the hotel or restaurant to come up with a banquet for Saturday evening
- Ask hotel/restaurant to set up small table with setting for one to remember those not here [Sgt-at-Arms will assist in setting the table]
- Ask hotel/restaurant for extra tables as desired for raffle prizes, etc.

- Ensure there is a host or no-host bar, as desired, for social and banquet
- Speaker/microphone system for banquet
- Table decorations for banquet
- Procure a guest of honor/speaker [CO, 2/4 or a Marine of interest generally]
- Gift basket for guest speaker [if desired]
- Obtain a biography & picture from the guest speaker
- If possible, obtain a color guard [preferably Marine]
- American flag and stand for annual meeting, memorial service and banquet
- Program for the banquet:
 - Lineage, coat-of-arms of 2nd Bn, 4th Mar, histories
 - Opening ceremony - present the colors
 - Biography & picture of the guest speaker
 - Play / sing national anthem
 - Play / sing The Navy Hymn [include at back of program] - optional
 - Play / sing the Marines Hymn [include at back of program] - optional
 - Welcome by President
 - Chaplain gives grace
 - Dinner
 - Introduction of guest speaker [include biography and a picture in program]
 - Presentation of "Wild Bill Weise Magnificent Bastard Award"
 - Introduce new president - pass gavel
 - Raffle - optional
 - Closing
- Raffle [This has been done most reunions, but is not required. It is a way to make a little money for the Association]
- Plaques for special association members and guests as President desires [discuss with him first]

Social Event / Picnic:

- Decide on whether or not to have an evening social and / or picnic and where [this would generally be on a Thursday or Friday]
- A tour of an historic site or a military related museum / venue is appropriate

Memorial Service:

- Pick a memorial service site, if not at the hotel
- If possible, obtain a color guard [preferably Marine]
- Speaker/microphone system for memorial service
- Program for memorial service:
 - Coat-of-arms of 2nd Battalion, 4th Marines
 - Title of reunion - location
 - Sound Attention
 - Sound Church Call
 - Present the colors with color guard
 - God Bless America [all sing]
 - Retire the Colors
 - Reading [“We Remember Them”]
 - Marines Hymn [1st verse]
 - Remarks by Guest [as desired] - optional
 - Guest of Honor - optional
 - Marines Hymn [2nd verse]
 - Scripture [as desired]
 - Read list of those lost to us during the past year - Chaplain
 - Taps played
 - Time to Hug
 - Marines Hymn [3rd verse]
 - Closing prayer
 - Sing “Eternal Father, Strong To Save” [all]

Transportation:

- Arrange / contract for a coach(es) to transport reunion participants to those venues requiring same
- Have the driver’s phone number available when on the trip

T-Shirts:

- T-shirts in the past have been the Port Authority brand which seems to be of good quality.
- Consider polo shirts which have pockets and shirts for the ladies as well.
- Once ordered, the shirts should be shipped to the reunion headquarters hotel. Shipping / receiving / contact instructions to hotel should be arranged before the reunion with someone who can hold them for us

Get The Word Out:

- Put ads in veterans magazines
- Make signs for hotel lobby
- Ask hotel/restaurant to put a "Welcome 2/4 Association" on front marquee
- Send reunion information, schedule of events and registration form to Web Sergeant for inclusion on the association web site and to the Sea Horse Newsletter Editor for inclusion in the newsletter

Registration:

- Registration packets
 - Table in lobby - hotel will provide
 - Name tags & holders
 - Schedule of events
 - Points of contact
 - Maps
 - List of restaurants and services nearby
 - Public transportation schedule
- Have extra registration forms on hand for late people
- Have extra schedules of events
- Have membership applications and membership cards on hand
- Need \$100 in change
- 2 Ice chests

Feel free to talk to the hosts of previous reunions about any issue about which you are not sure. There are lists of veterans organizations, battalion logos, old programs, etc. available from previous hosts which can assist you in your planning.

Sea Horse Newsletter Fee For Hard Copies

The Sea Horse is sent free electronically to those members having internet access. Those members not having internet access; i.e., they have no computer; will get their Sea Horse free via the U.S. Postal Service in hard copy. Members having internet access, but desiring a hard copy in lieu of the electronic issue, will be required to pay \$10 per year in addition to normal dues or as a life member.

The Membership Chairman will submit a list of those having internet access, but desiring a hard copy of the Sea Horse, to the Secretary by April each year. The Secretary will then mail each of those individuals a notice due for the \$10 fee. These monies will be sent to the Treasurer. The Treasurer, upon receipt of monies, will notify the Sea Horse Editor of those persons desiring hard copies of the Sea Horse as paid up for that fiscal year [1 July - 30 June].

Website

The Association website is considered the property of the Association, but the domain name and server services are under the purview of Redemer Concepts, the website manager for the Association. All web site services are managed through the Association Web Sergeant and Redemer Concepts for the purposes of continuity and control by a third, dis-interested party. Redemer Concepts will bill the Association for such services as necessary to maintain the web site.