

WASHINGTON DC CHAPTER  
USCG CHIEF PETTY OFFICERS ASSOCIATION  
OFFICERS' NOTEBOOK

Tab A - Yearly Planning Schedule

Tab B - Officer and Committee Duties

Tab C - Meeting Agenda Format

Tab D - National Chapter Directory Listing

Tab E - Installation Ceremony Script

Tab F - Chapter Standing Rules

Tab G - National Constitution and By-Laws

WASHINGTON DC CHAPTER CPOA PLANNING SCHEDULE FOR  
**CHAPTER PRESIDENT**

Recruit committee chairs at beginning of term

- Membership
- Marketing
- Newsletter
- Coastie of the Quarter program
- Southwest Community House liaison
- Morale Committee representative
- Sunshine
- Special Functions

Decide how you want to handle chapter mail and change routing symbol with the National Office (e.g., if you want the vice-president or secretary to receive the mail, have that person's routing symbol put on our mailing labels); also advise the mail room. [A pick-up box has now been established in the mail room.]

Planning for chapter meetings -- reserve room, if necessary; prepare agenda; put out notice a couple days ahead on e-mail

Check with the HSC secretary to reserve room B732 on a regular basis the 3rd Thursday of each month; the key to the room is in her top desk drawer

ONGOING PROJECTS (should be handled by committee chairs)

Coastie of the Quarter program -- presentation of a certificate and savings bond to the quarterly winner (the PERSRU will call when the quarterly winner is selected)

Marketing: chargebooks and hatboxes -- advertise, take orders, process orders, keep records

Chapter newsletter -- produce and mail issue at least quarterly

Recruit new members! -- membership chairman should keep list of new members added

"THE CHIEF" magazine -- submit articles on chapter activities

MAY	Officer installation ceremony & breakfast
	Submit new officer roster to national office
	Plan picnic for children from SWCH
JUNE	Plan for Coast Guard day picnic <ul style="list-style-type: none"> <li>- cooking or serving shifts</li> <li>- sales booth</li> </ul>
	Submit Outstanding Chapter Award application
JULY	Hold picnic for children from SWCH
	Select delegate to National Convention
	Plan "welcome aboard" event for September, such as a CPO picnic at Ft. McNair
AUGUST	Chapter delegate attends National Convention
SEPTEMBER	Report results of National Convention
	Hold "welcome aboard" event
OCTOBER	Begin planning CGHQ children's Christmas party
NOVEMBER	Organize flags event at Arlington for Veterans Day
	Support Thanksgiving at SWCH (turkeys or other donation)
	Plan children's Christmas party for SWCH
	Plan food/clothing/gift drive for Coast Guard and community families
	Participate in adopt-a-family program for holidays
DECEMBER	Hold CGHQ children's Christmas party
	Hold SWCH children's Christmas party
	Hold food/clothing/gift drive
JANUARY	Choose nominating committee for officer elections
FEBRUARY	Open nominations

Hold "Valentines for  
Veterans" event

MARCH

APRIL

Close nominations; mail out ballots

Arrange for committee to audit treasurer's books

## **SECRETARY**

Prepare and copy minutes of monthly meetings.

Arrange for chapter meeting room each month (if attendance is exceeding B732).

Watch for D.C. corporation renewal in the mail. This renewal is currently due annually in April.

Ensure delegate accreditation paperwork for National Convention is submitted in time.

Prepare any necessary correspondence, such as thank-you letters, cover letters for donations, etc. (a chapter stationery template is available for SWIII).

Keep a folder of OUTSTANDING CHAPTER items and update President periodically on status; submit the application to the National Office at the end of June (the application year is 1 July - 30 June); the following records should be kept [check revised requirements]:

Communication with National Office -- one call or mailing at least monthly (good idea is to fax or mail the agenda or minutes from monthly chapter meetings); keep a copy marked with the date sent

Chapter newsletters -- needs to be published at least quarterly with a copy to the CA

Donations of at least \$15 to the following national funds; keep a copy of the check --  
CCCAF  
Building Maintenance Fund  
Disaster Relief Fund  
Enlisted Person of the Year Program Fund

"THE CHIEF" magazine -- submit at least 4 articles per year on chapter activities; keep a copy marked with the date submitted (anybody can write these -- keep them short and include a picture with caption, if possible)

Return any item marked "THIS IS AN OUTSTANDING CHAPTER AWARD ITEM" promptly to the National Office; keep photocopies

Get from membership chairman --

- list of new members (transfers do not count) added during the year
- number of prior and new silver lifetime members
- percentage of members paying by allotment

All this information can be taken from the monthly membership print-outs we get from National.

Service projects -- keep file of thank-you letters, news clippings, photographs or whatever can be used to document each project

Financial donations (other than CPOA funds listed above) -- keep copy of transmittal

letter and check

Copy of convention delegate accreditation form

## **TREASURER**

Bank account is in the Coast Guard Federal Credit Union

Account number: 4972006  
Share account suffix: 00  
Checking account suffix: 71

Cue phone: 7-4040  
Security code: 0063

Obtain new signature cards from the Credit Union; have all 4 new chapter officers sign them so that if the treasurer is out of town, someone else will be able to write checks.

Ask the Credit Union to change the mailing address for statements to your home or office address.

Write checks as needed; keep a photocopy of any checks needed for chapter records, as the Credit Union does not return them.

Prepare a treasurer's report monthly shortly before the chapter meeting showing previous balances in each account, income and expense items during that month, and current balances.

## **MEMBERSHIP**

Review monthly membership reports from National to ensure new members are added; contact any members who are dropped for nonpayment of dues to ensure they get their renewal in.

Get "welcome aboard" letters to Chiefs arriving at DC commands. Extend personal invitation for them to attend the next chapter meeting.

Ensure memberships for newly initiated chiefs are sent to National. A CPO does not have to be initiated in order to join the CPOA; however, CCTI is a good time to collect the dues money or set up the allotment and get the application processed. In the past we have usually used some of the cash from the initiation for the dues. This works fine to get the membership started, but sometimes the new member fails to renew the next year. If you can convince new chiefs to sign up for an allotment (\$1.50 per month), this is the best arrangement for the association, as once it is started, people tend to keep it.

Keep tally of new members added during the year.

Encourage members to pay by allotment.

Submit changes of address to the National Office. These can be mailed, faxed to (703) 941-0397, or e-mailed to [cgcpoa@aol.com](mailto:cgcpoa@aol.com).

Report status of membership at monthly meeting.

## **MARKETING**

Manage chapter income-producing projects. The projects currently approved by the National Office are: CPO charge book, hatboxes and business cards.

Ensure mail orders are promptly filled.

Keep track of inventory.

Track income and expenses of each project so that the chapter can determine profitability. Provide periodic reports to the membership at chapter meetings.

## **NEWSLETTER**

The chapter newsletter should be published at least quarterly. A format with logos is available on SWIII. Articles should be short and feature activities the chapter has participated in recently as well as upcoming events.

Mailing labels for all chapter members, as well as the National officers and all the other chapters, are sent from the National Office in the monthly mailing. A list of members who work in the CGHQ building should be maintained by the newsletter chairman -- it saves postage if these newsletters can be hand-delivered rather than mailed. Because of the number of retirees and chapter members who no longer live in the area, a single mailing costs at least \$40 in postage.

## **COASTIE OF THE QUARTER PROGRAM**

The PERSRU will call when the Coast Guardsman of the Quarter is selected. Each candidate should be presented with a \$100 savings bond, a certificate of recognition and a one-year membership in the CGEA.

Series EE savings bonds must be purchased at a full-service bank. Get the money from the chapter treasurer (\$50 for a \$100 bond). Information needed to fill out the application includes: name, SSN, mailing address and name of co-owner or beneficiary (usually the spouse). The candidate should indicate if he/she wants a co-owner or a beneficiary.

Get a check from the chapter treasurer for \$18 for the CGEA membership and get it along with the member's name, address and birthdate to the National Office. If this is done far enough in advance, the new member package can be mailed to the chapter for presentation at the ceremony.

Certificates can be made in-house by someone with graphics capability (check with MCPO Lackey or MSTCM Peters).

The chapter president should make the presentation at the ceremony.

## **SOUTHWEST COMMUNITY HOUSE LIAISON**

Address: 156 Q Street, S.W.  
Washington, DC 20024

Phone: (202) 488-7210

Director:

Assistants: Roberta Patrick  
Delores Mack

The Southwest Community House is the primary social service agency for neighborhoods in Southwest D.C. This non-profit organization provides emergency food and clothing for families, employment services, and programs for youth in the area. The SWCH has been the Washington DC Chapter's official adopted charity for many years.

In past years, the Washington DC Chapter has provided the following support to the SWCH:

- An annual Christmas party for kids from the community
- An annual Christmas food and clothing drive
- Purchase of several turkeys at Thanksgiving for food baskets
- A "Christmas in August" canned food drive
- A summer picnic at Ft. McNair for kids
- Advertising and recruiting coaches for the student summer job coach program
- Donation and repair of several computers
- Support on construction projects
- Support on the "D.C. Cares" spring clean-up

In addition, the chapter has helped support the spring awards ceremony and fundraiser by purchasing a \$125 ad in the ceremony program and by sending a representative to the awards dinner.

Mr. Tom Fisher, Deputy Director of Personnel Management, is on the board of directors. Tom was made an "honorary chief" by the chapter a few years ago for his work with the house and the chapter. The SWCH liaison should invite Tom to any functions involving the SWCH.

The SWCH Liaison should be someone who can be contacted on a regular basis by the Director for arranging support of special events.

## **MORALE COMMITTEE REPRESENTATIVE**

Attend Morale Committee meetings in order to have a voice in any events or decisions affecting CPOA activities.

The Morale Committee provides funding for the HQ Children's Christmas Party. This amount has been cut every year for the past few years; the CPOA should be present during the budget negotiations.

## **SUNSHINE**

Provide cards or flowers for special occasions affecting chapter members or other chiefs: marriage, birth of a baby, illness, death in the family.

## **SPECIAL FUNCTIONS**

The special functions that the Washington DC Chapter has traditionally participated in are:

**HQ CHILDREN'S CHRISTMAS PARTY:** For children of HQ employees; held on a Saturday in the cafeteria; funded by Morale Committee (file with details available in CPOA file cabinet)

**SWCH CHILDREN'S CHRISTMAS PARTY:** For children from SWCH; held on a weekday afternoon (file with details available in CPOA file cabinet)

**HOLIDAY FOOD AND CLOTHING DRIVE:** Coordinated with the HQ CEA during the Thanksgiving and Christmas season; supports needy Coast Guard families as well as SWCH

**THANKSGIVING FOR SWCH:** The chapter has traditionally bought turkeys for the SWCH Thanksgiving baskets

**VALENTINES FOR VETERANS:** Make a giant Valentine for during a lunch hour in the cafeteria; deliver to USO for a VA hospital; simple to do and good PR

**CHRISTMAS IN AUGUST:** A canned food drive for the SWCH held in the summer; has been moderately successful

**COAST GUARD DAY PICNIC:** Assist with one of the major functions, such as food service; set up and run a merchandise sales booth

**SWCH CHILDREN'S PICNIC:** A picnic for kids from the Southwest Community House; held on a weekday at Ft. McNair or Haines Point

**CPO PICNIC:** Can be held at Ft. McNair as a summer social occasion or a fall "welcome aboard" event

**BAKE SALES:** These are an easy-to-do and profitable fundraiser

**USED BOOK SALE:** Fundraiser; can be done about once a year

**MEDAL OF HONOR DINNER:** The chapter has pulled this off twice; nice event, lots of work. Medal of Honor recipients were invited to attend.

The Special Functions Chairman does not need to run every one of these events, but should ensure that planning for each begins well enough in advance and that chairman for each are appointed.

## **BAKE SALE CHAIRMAN**

Bake sales have been an easy way for the chapter to raise funds. They often net around \$200. Steps for pulling off a successful bake sale are:

1. Reserve a conference room with building management for 0700-1000 on an acceptable date about 3-4 weeks in advance.
2. Publicize the event among the chiefs using the "chief net" distribution list. Give the date, time and place and request people to bring donations of baked goods. It is easiest to manage if people bring things wrapped in individual serving portions, such as 3 cookies in a plastic baggie. Also solicit people to work the bake sale in half-hour or hourly shifts.
3. Submit an article to the HQ Newsletter. Deadline is Tuesday for the following week. Emphasize the chapter's charity projects in the article.
4. Make a flyer to post on restroom bulletin boards. Advertise a start time of 0730 so you have time to set up.
5. Send out reminders to Chiefs to bring in baked goods. Talk to Chiefs you see in person.
6. The day before, gather brown paper bags, paper plates, a knife, post-it notes, markers and change (one dollar bills and quarters).
7. Set up early the morning of the sale. Make signs with names and prices of items on post-it notes. Keep prices in multiples of 25¢.
8. At the end of the sale, reimburse yourself for any change you provided and turn the proceeds in to the chapter treasurer.

## **CHAPTER MEETING AGENDA FORMAT**

Call to Order

Minutes of last meeting (can be printed/passed out or read)

Treasurer's report

Committee reports

Membership

Marketing

Newsletter

Special functions

SWCH

Coastie of the Quarter

Morale committee

Sunshine

Old business

New business

Good of the order

Adjourn

## INSTALLATION CEREMONY FOR CHAPTER OFFICERS

(Installing Officer to Incumbent President)

Mr./Madam President: The term for which you and your subordinate officers were elected has now expired. I am present to install your newly elected officers. Have the officers for the ensuing year been duly elected?

(A: They have)

Have the records and accounts of the Chapter been examined and approved by the Audit Committee?

(A: They have)

Do you have in your possession the Chapter Charter and the gavel of your office?

(A: I have)

You will surrender them to me. Mr./Madam President, you will call the roll of the officers-elect, and as the names are called, the officers will stand.

President:

Vice-President:

Secretary:

Treasurer:

It now becomes my duty and honor to install the officers in accordance with the Constitution and By-Laws of the Chief Petty Officers Association. Will the officers-elect please come forward.

I have the honor of now installing you who have been chosen by your fellow Chiefs in the **Washington DC** Chapter of the Chief Petty Officers Association to administer its affairs for the ensuing year.

Mr./Madam President-elect: place your left hand on the Bible before you. Officers-elect to the rear, place your left hand on the shoulder of the person before you. Now all raise you right hand and answer the following questions in the affirmative in taking the Oath of Office.

Will you conscientiously perform all the duties of your office as prescribed by the Constitution and By-Laws of the Chief Petty Officers Association and the Governing Rules of this Chapter?

(A: I will)

Will you at all times, protect the interests of the Chief Petty Officers Association and its Chapters, its Auxiliary Units and members, to the best of your ability?

(A: I will)

Will you keep an accurate and true account of all funds, books, papers, and other property belonging to the Chapter, entrusted to you; and submit them to audit when required, and at any time you are requested to do so by competent authority; and at the close of the term to which you have been elected, or sooner if so directed by proper authority, deliver such property in your possession or under your control to the person or persons, officer or officers, entitled to receive same?

(A: I will)

Then say after me, using your name as I do mine:

I \_\_\_\_\_, do hereby solemnly promise, that I will faithfully discharge the duties of the office to which I have been elected according to the Constitution and By-Laws of the Chief Petty Officers Association and the governing rules of this Chapter, to the best of my ability. This I freely pledge as a citizen of our United States of America and on my honor as a Chief Petty Officer in the United States Coast Guard.

You may lower your hands.

Officers: You now occupy a position of honor, trust, and responsibility to which your fellow Chiefs have elected you. The Constitution and By-Laws of the Association and the governing rules of the Chapter prescribe your duties. Study them well so that you may intelligently discharge the obligation you have assumed. I congratulate you.

Mr./Madam President: This Chapter is about to be placed in your charge. The harmony and progress of its affairs will depend to a large extent upon your leadership. Your fellow Chiefs have honored you by electing you to the highest office in the Chapter and making you a member of the National Board of Directors. They have placed their faith in you and you owe them a solemn obligation to do your utmost to perform the duties of your high office, as its most obedient servant, never its master.

I place in your hands this gavel. It is the emblem of authority. You are admonished to always use it wisely and impartially.

Study the principles set forth in the Constitution and By-Laws of this Association and the governing rules of this Chapter. Become familiar with parliamentary procedure, for it is your duty to discharge the rules and rituals of the Association and to pass on rules

governing debates. Your duty is in reality a privilege - that of serving your fellow Chiefs.

I now deliver the Charter of this Chapter into your hands. As President, you are personally responsible for its safety. It is your duty to see it is prominently displayed at all Chapter meetings. Upon completion of your term of office, deliver it to your successor in officer.

I now declare the officers of the **Washington DC** Chapter of the Coast Guard Chief Petty Officers Association are duly installed and the Chapter is in working order.

WASHINGTON, D.C. CHAPTER  
CHIEF PETTY OFFICER ASSOCIATION  
STANDING RULES

ADOPTED 18 APRIL 1991

REVISION 1-04/92: SR3  
REVISION 2 -05/93: SR3 & 4

These Standing Rules have been adopted for conducting the business and maintaining the good order of the Chapter. They may be amended at any regular membership meeting, provided the proposed amendment has been published at least 30 days. An exception is a declared emergency that necessitates a change vital to the welfare of the Chapter. All clerical errors may be corrected by the Chapter Secretary without prior approval of the membership.

## WASHINGTON, D.C. CHAPTER CPOA

**STANDING RULE 1:** Regularly scheduled general membership meetings shall be held monthly, at a time and place decided at the previous general membership meeting. Should there be any unforeseeable change, the President will notify the general membership no later than three (3) days prior to the scheduled meeting of any changes. A quorum shall exist when at least two officers are present, one of which must be the President or Vice-President, and at least five other Chapter members. If a quorum is not present at a regular meeting, the next called meeting shall be valid for conducting business, and the call shall so inform the members. Any special general membership meeting may be called by an Elected Officer, with three (3) days notice, to conduct business that is of interest to the whole membership and cannot wait until the next scheduled meeting.

**STANDING RULE 2:** The Board of Directors shall be the Elected Officers and the Committee Chairpersons. The Board of Directors shall meet monthly at a time and place set by the President. The Board of Directors shall be responsible for conducting business and maintaining the well being and good order of the Chapter.

**STANDING RULE 3:** All Chapter funds expenditures shall be ratified by the general membership. **All commitments and obligations on behalf of the Chapter involving funds over the amount of the petty cash fund shall be made in writing and shall be signed by two members of the Board of Directors, one of which must be an elected officer of the Chapter.** No marketing activity shall be conducted solely from any member's residence. Any documentation kept on computer must be compatible and/or transportable to the CG Standard Workstation. The President is authorized an expenditure of up to \$100.00, or ten (10) percent of the Chapter treasury, whichever is less, to be ratified at the next general membership meeting. The other elected Chapter Officers are authorized, in the absence of the President, the expenditure of \$50.00 or five (5) percent of the Chapter treasury, whichever is less, to be ratified at the next general membership meeting.

**STANDING RULE 4: COMMITTEES:** Committee Chairpersons **may** be authorized a petty cash fund, as directed by the general membership, with a full report of such funds given at each meeting. **Reimbursement for petty cash from the Chapter treasury shall not be made until a written report is filed.** *Each Committee shall maintain accurate documents of funds received and expended; including receipts, deposits, invoices, payments, and a running ledger or spreadsheet of funds. These documents shall be audited as part of the annual Chapter audit.*

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<sup>1</sup> Sections written in **Bold** are revision 1.

<sup>2</sup> Sections written in *Italic* are from revision 2.

**STANDING RULE 5:** Associate Member. Associate membership is defined in the Chief Petty Officers Association National Constitution & By-Laws.

- a. An Associate Member may vote in Chapter elections and other Chapter business.
- b. An Associate member may not vote for the National Proceedings.
- c. An Associate member may not hold any elected office.

**STANDING RULE 6:** Affiliate Members may vote in all Chapter business. They shall not be eligible to hold an elected Chapter office. They shall be assessed annual dues of \$18.00 for which they will get a subscription to 'The Chief' magazine.

**STANDING RULE 7:** Elections shall be held annually. The nominations shall be opened at the January general membership meeting and closed at the March general membership meeting. Ballots shall be distributed to all Chapter members within seven (7) days after the March general membership meeting. Ballots shall be returned to the Balloting Committee no later than 30 April. The installation of new officers take place during May. The ceremony shall be at the call of the newly elected officers.

**STANDING RULE 8:** The term of office shall be for one year, from installation to installation, or until a successor is elected. All Chapter Officers shall be limited to two (2) consecutive terms in the same office, or until a successor is elected.

**STANDING RULE 9:** If the office of President becomes vacant, the Vice-President shall take the office for the remainder of the unexpired term. The President shall appoint a Chapter member to fill any vacant elected office for the remainder of the unexpired term.

**STANDING RULE 10:** If the Chapter charter is suspended, all funds, books, records, and properties shall be relinquished to the National Association. The assets of the Chapter shall not be distributed among the members or any individuals connected with the Chapter.