



COA Local Branch Leadership End-of-Year Checklist

Recommended Start Date: May 2025

Date Officers Can Renew COA Dues for 2025-2026: June 4, 2025

Recommended Completion Date: July 29, 2025

- If the branch does not have one already, create a free Google email account (Gmail) for the local branch

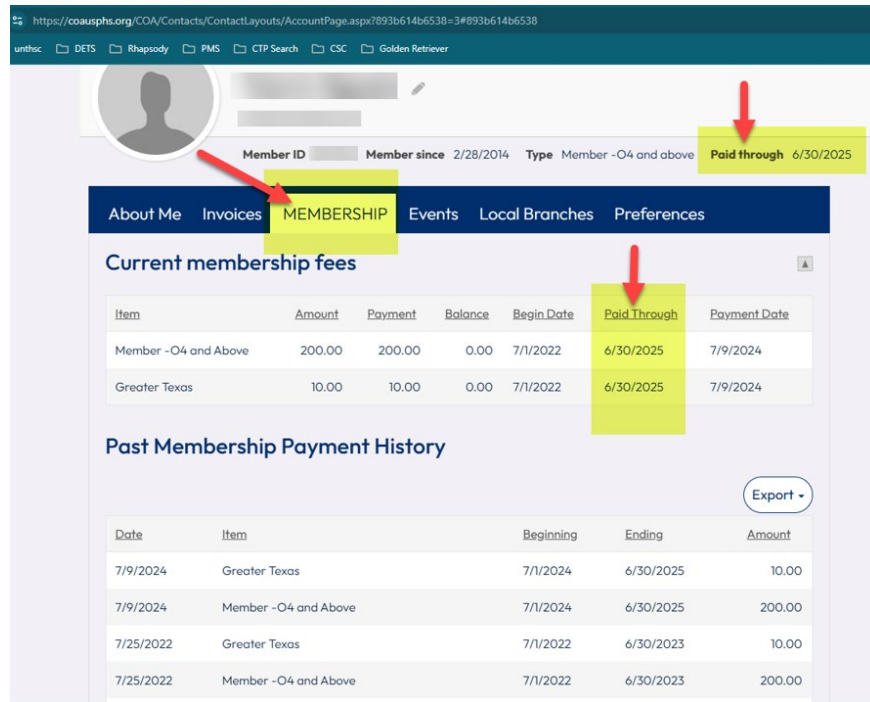
- Organize all branch files, such as bylaws, meeting notes, rosters, newsletters, merchandise information, logos, photos, etc. into a folder to provide to the incoming Executive Committee

- Recommended: Write and issue Certificates or Letters of Appreciation for your Executive Committee, Committee Chairs, and branch volunteers. *Note: Outgoing Branch Presidents will receive LOAs from National COA.*

- Hold elections for the Executive Committee positions (Pres, VP, Secretary, Treasurer, and Other if applicable for your branch - e.g., President-Elect)
 - Remind officers that Exec Committee members will be required to be dues-paying members of COA to serve
 - Recommend using an online survey to maximize participation; include officer bios highlighting their relevant experience
 - The election can include Committee Chairs, or this can be done later once the Operational Year starts

- Newly elected Executive Committee members (Pres, VP, Sec, Treas, & Other [Immediate Past President, President-Elect]) must pay for their 2025-2026 dues starting June 4, 2025 (this is the date the system will open for next year)
 - The outgoing Executive Committee must confirm that the newly elected Exec Committee have paid their 2025-2026 National & Local Branch dues prior to submitting their names to National COA in the Annual Branch Updates Form.
 - There are two ways to verify membership status:

- The outgoing Exec Committee can email Donna Sparrow (dsparrow@coausphs.org) to confirm that all incoming Exec Committee members have paid through 06/30/2026
- The outgoing Exec Committee can request that the incoming Exec Committee send them screenshots of their COA portal indicating their membership expiration date (must say 06/30/2026)



Note: this is a screenshot from May 2025 prior to dues renewal in June; once an officer renews their dues in June, the "Paid Through" column should show 06/30/2026

- If a nominated officer does not want to become a dues-paying member of COA, another officer should be appointed to serve in that leadership role for the 2025-2026 operational year. Confirm this individual's dues-paying status.
- AFTER confirming dues status for all nominated Executive Committee members, the outgoing Branch President needs to fill out the **Annual Branch Updates Form** (starting June 4, 2025): [SURVEY MONKEY LINK](#)
 - This is required – due Tuesday, July 15, 2025**
 - If the outgoing President does not complete this, the branch will be considered "Inactive" for the 2025-2026 operational year
 - Outgoing presidents will not receive a Letter of Appreciation from National COA until this form is completed for their branch

Hold a handoff meeting with the incoming Executive Committee and provide them with the following:

- Organized folder of all branch files (bylaws, meeting notes, rosters, newsletters, merchandise information, logos, photos, etc.)
- Gmail log-in information.
 - Ensure the POC listed on the gmail is one of the new exec committee members (with their phone number and personal email as recovery contacts)
- Social media or website log-in information (e.g., Facebook, Instagram, websites)
 - Ensure the recovery email belongs to one of the new exec committee members
- Physical branch merchandise (e.g., t-shirts, cups, etc.)
- Conduct a bank hand-off if applicable (some banks required in-person POC transfer)
- An overview of successes and challenges from the past operational year; answer any questions the incoming leadership has
- Share the National COA Local Branch Committee's email address (nationalcoallocalbranch@gmail.com) and inform them of the monthly National COA Local Branch Leadership Meetings (dates/times TBD)
- Inform them how to locate the Local Branch Resources tab on the [National COA website](#) (select "Local Branches" at the top - must be logged in to access)

All COA Branch Members: Renew dues for 2025-2026 starting June 4, 2025 (for period of July 1, 2025 – June 30, 2026)

- Visit <https://www.coausphs.org/> and select the "Join or Renew" tab