



**National Commissioned Officers Association (COA)
Local Branch Handbook**

CHAPTER ONE: National & Local COA

Section One: National COA

- Functions of the National Office Member Services
- Visits by National Representatives
- COA Logo

Section Two: Local COA

- Terms of Affiliation

CHAPTER TWO: Branch Fundamentals

Section One: Establishing a New Branch

- Getting Started
- Criteria
- Organizing Process
- Mission
- Financial Assistance by National COA

Section Two: Branch Organizing

- Branch Name
- Address
- Area Demographics
- Membership Count

Section Three: Operating Considerations

- Advice of Counsel
- Incorporation
- Income Tax Exemption
- Political Activity
- Stationery
- Membership Directory
- Membership Cards
- Liability Insurance

Section Four: Branch Governance

- Possibilities
- Governing Body
- Elected Officers

Section Five: Officer Positions

- President
- Vice President or President-Elect
- Secretary
- Treasurer

CHAPTER THREE: Meetings & Activities

Section One: Meeting Ideas

- Conforming to Member's Desires
- Frequency of Meetings
- Types of Meetings
 - o Social Meetings
 - o Business Meetings

CHAPTER FOUR: Finance

Section One: Financial Advice

- Financial Independence
- Bank Account
- Operating Costs

- Source of Funds
- Dues

APPENDIX

Appendix A:

Suggested Branch Bylaws

Appendix B:

Branch Officer Update Form

Appendix C:

Guidelines for working with Local Media

Appendix D:

Sample Press Release

Appendix E:

Challenges Branches Might Face and Possible Solutions

COA Local Branch Handbook

Introduction

This handbook provides information and suggestions that will help in the organization and management of local COA Branches.

National COA is proud to introduce this updated Branch Handbook to assist our local branches through different situations that have presented themselves over the years. COA hopes this guide will be beneficial to all branches. The handbook is designed to assist you in the establishment and management of your branch.

Although we have tried to anticipate your questions in this guide, we understand questions may still arise and we encourage you to contact us with any inquiries.

Pursuant to Article Four, Section One of COA's By-laws stipulates that neither national COA nor an affiliated local branch may participate in the governance concerns of the other. Furthermore, any affiliation may be cancelled by the unilateral action of either of the organizations involved. Consequently, COA has no authority to tell any branch how to organize or how to conduct branch business. This handbook simply offers advice, gathered from branch and national COA leaders, on the handling of branch affairs. The ideas advanced herein constitute sound guidance for the organization and management of a typical branch.

Mission Statement

The mission of COA is to protect and enhance the public health and safety of the United States by supporting and advancing the interests of the Commissioned Corps and its officers.

Chapter One: National & Local COA

Section One - National COA

In meeting COA's commitments, the organization's activities include: the provision of comprehensive member services; implementing public representation and advocacy; administering education and training for health professionals; conducting studies and research; and collaborating with related organizations and the broad dissemination of public and professional information.

The COA of the U.S. Public Health Service (USPHS) is a national association of individual members which draws primarily from former, active, retired, and reserve components of the Commissioned Corps of the USPHS. The Board of Directors are elected by the membership and control and direct the overall affairs of the association. A paid professional staff headed by an Executive Director, acts for the board in conducting the routine business of the organization.

While the actual founding date of COA is unclear (certain records show an informal organization dating back to the early 1900's), on October 16, 1951, COA officially commenced operation under the direction of a group of active duty Commissioned Officers.

COA is a non-profit organization incorporated under the laws of the state of Maryland. COA is also a tax-exempt organization under Section 501(c) (6) of the Internal Revenue Code, hereinafter referred to as "the Code." This tax exemption does not extend to COA branches (see the discussion in Section Three of Chapter Two on income tax exemption.)

Functions of the National Office Membership Services

The Membership and Development Coordinator serves as the point of contact at COA headquarters for all branches. The coordinator's responsibilities are to foster communications, generate close cooperation between national COA and local branches, and provide assistance to individual branches. The Membership and Development Coordinator also performs these primary functions:

- Provides guidance and assistance in the formation of new chapters.
- Provides information and suggestions to help in the organization and management of local branches.
- Maintains current active (and expired) membership listings of all local branches, which are available to branch leaders upon request.
- Provides a branch president welcome letter at the beginning of a term.

Interaction with National Representatives

It is essential that leadership of the national COA interact with local branches throughout the country to stay connected with the membership. Virtual interaction as well as planned in-person visits are both valuable to maintaining cohesion between the branches and the national COA.

Occasionally, the Executive Director (ED) or Deputy ED may visit a branch in person, for example, for a special occasion such as a dining out, an important ceremony, or other relevant function. Branches may request a visit or invite the ED via email or formal invitation, but should do so with plenty of lead time, at least two months in advance of the event. In-person visits are subject to understandable limitations on travel funds and the availability of national officials.

If the ED or Deputy ED travels to local branches, an attempt should be made to visit multiple local branches during the same trip. COA requires at least one month, and preferably two months, advance notice to set up such visits. National COA bears such official travel expenses.

Virtual or in-person interaction with the national COA leadership or board members may also be necessary to assist branches which need assistance with membership initiatives. This is especially true for branches at risk of dissolution due to low membership, lack of interest, or disorganization.

COA Logo

The Commissioned Officers Association logo appears below:



Any COA local branch can use the logo on the following items, provided such use is in line with the purposes of the branch and national COA. When in doubt, contact national COA):

- Printed material such as letterheads, newsletters, meeting notices, special bulletins, membership cards, and meeting programs.
- A flag or banner for the branch's use.
- Individualized awards such as plaques, trophies, and certificates.

Under no circumstances can a branch use the national COA logo in connection with the endorsement of a commercial enterprise or a political candidate. However, the logo can be used for local branch fundraising and the selling of esprit de corps items.

An electronic version of the logo can be found on the COA website on the [Local Branch page](#). The national COA logo should not be augmented with other elements (such as adding a local flair), however, a branch can develop its own logo modeled after the National logo. Additionally, the national COA logo can be used in combination with another logo, such as a local logo.

Section Two - Local COA

COA's bylaws provide standards for the creation and structure of local COA branches. Such branches are independent, self-governing, and self-supporting organizations of COA that affiliate with national COA for the purpose of cooperation and mutual support. The COA Local Branch Committee reviews applications for branch recognition and makes a recommendation regarding such applications to the COA Board of Directors for approval/disapproval.

Terms of Affiliation

As prescribed in Article Four of COA's bylaws, the terms of affiliation between a local branch and national COA are as follows:

- An application for affiliation must be submitted by the branch and approved by the national board of directors.
- The affiliation is for the purpose of cooperation in furthering the mission of COA.
- Neither organization is authorized to participate in the organizational or managerial concerns of the other.
- Either organization can cancel affiliation by unilateral action.
- Any member of a local branch must be an active member of the national COA. This clause will be written into the local branches' bylaws.
- No local branch shall hold itself out as an agent of the Association without the express written consent of national COA. Letterhead and other materials referring to the Association that are issued by any of the local branches are subject to review and approval by national COA.

Chapter Two: Branch Fundamentals

Section One - Establishing a New Branch

Getting Started

There are many reasons why a member may want to start a new local branch. If the nearest established local branch is too far, for example, a group of officers stationed within a geographical area may feel underrepresented and may decide to form a local branch of their own.

Regardless of how the local branch originates, COA members who organize the local branch must be stationed or live within that geographical area.

A group of COA members desiring recognition as an affiliated branch of the Commissioned Officers Association may, at any time, apply for branch recognition. (See the "Terms of Affiliation" discussion at the end of Chapter One, Section Two.)

The national COA office will accept the application and forward it to the board chair of the COA Local Branch Committee for review. Upon review of the application, the COA Local Branch Committee Chair will present it to the board of directors for approval at the next regularly scheduled board meeting.

Criteria

When considering an application for local branch recognition, the following criteria shall be applied:

- **National COA bylaws:** An application for membership must include a statement that the applicant(s) have read and familiarized themselves with the national COA bylaws, including article four that addresses local branches.

Members: There is not a minimum number of members required for branch recognition. However, the potential for the branch to remain viable for at least five (5) years and the number of national COA members who have agreed to join the new local branch will be considered. All applications must include a list of officers, who must be **current national COA members**, which intend to affiliate with the new branch and a five (5)-year sustainability plan. There shall be no discrimination in membership or participation by reason of age, disability, race, ethnicity, color, national origin, religion or belief, sex, sexual orientation, or gender identity.

Location: National COA encourages cooperation, not competition, between local branches. While there is no specified geographic distance between branches, the petitioning branch should demonstrate in its application that its central location (locus of most of its members) is not an easy drive to the central location of an existing branch. Applications for branches that are within thirty miles of an existing branch must include a statement that the existing branch president was notified of the potential new branch and the existing branch agrees or objects to the formation of a new branch. The agreement or objection from a nearby existing branch will be a relevant, but not dispositive, factor in consideration. COA is not opposed to virtual branches. However, virtual branches should not attempt to compete with the geographic branches.

Bylaws: An application for branch recognition must also include a proposed set of branch bylaws (See Appendix A) that are unique to the branch. As required by article four, section four of the national COA bylaws, the bylaws of each local branch must incorporate in its bylaws a provision that all members of the local branch maintain membership in national COA. Also included in the bylaws must be a statement that the local branch shall not hold itself out as an agent of the association without the express written consent of the association (see article four, section six of the national COA bylaws.)

Organizing Process

To accomplish the process of organizing a new branch most expeditiously, follow these informal steps:

Phase 1: The Initial Organizing Meeting. From among its own members, the organizing committee should select a chairperson, secretary, and treasurer to serve until the installation of elected officers.

The organizing committee should inform the national COA's membership coordinator of the effort. The committee should provide information on the contemplated branch area and a tentative development plan with a name, address, email address, and telephone number for a point of contact. They should request, from national COA's membership coordinator, a listing of COA members, unaffiliated with a local branch, residing in the geographic area of the proposed branch. This listing can serve as a principal list of potential branch members.

About three (3) weeks before the first organizing meeting, the committee is strongly encouraged to inform, via email, all potential members regarding the proposed branch. This correspondence should suggest and/or advise of avenues that the local branch will use to serve officers (active, ready reserve, and retired) in the area. The correspondence should invite all potential members to the first meeting to discuss the pros and cons of proceeding with the formation of a new branch.

If the organizing committee believes it would be helpful, the chairperson should invite the president of a nearby local branch to attend and participate in this first meeting.

In the initial organizing meeting, the presiding chairperson of the organizing committee should explore the reasons for establishing a local branch. The group should decide whether to proceed. If the decision is yes, take these next steps:

- Reach a tentative agreement on a branch name, the branch's geographical boundaries/catchment area, and the proposed dues for the balance of the COA fiscal year.
- Authorize the organizing committee to draft proposed bylaws (see Appendix A.)
- Form a nominating committee to prepare a proposed slate of prospective officers for the current operational year and submit, in writing, to the secretary of the organizing committee. This slate should conform to the branch organization as prescribed in the proposed bylaws. If the individuals have less than six (6) months to serve in the current year, it is reasonable to have their terms extend through the following year.

Phase 2: Second Organizing Meeting. About three (3) weeks before the second organizing meeting, the organizing committee should send correspondence to all potential members, not just those who attended the first meeting. This letter should attempt to develop interest in the proposed branch and provide a brief status report on the project. Also, enclose a copy of the proposed bylaws and proposed slate of officers and directors. Urge potential members to attend the next meeting for formal branch establishment.

The secretary of the organizing committee should preside at the second organizing meeting. Three (3) important items of business that need to occur:

- Approve the branch's bylaws.
- Elect the proposed officers and directors, who must be current national COA members.
- Authorize submission of an application for affiliation with national COA.

In addition, attendees who are not national COA members should have the opportunity to submit membership applications along with initial dues payments (note that subsequent dues payments will be made directly to the national office in conjunction with the annual dues renewal process). Upon official branch establishment/approval, if local dues are implemented, local dues will be collected at the time of the branch affiliation.

Following the meeting, the organizing committee chairperson should submit a written application for affiliation with national COA. The application should include the following:

- Copy of the proposed branch bylaws.
- List of elected officers and their mailing addresses, email addresses, and telephone numbers.
- List of potential members as of the date of application submission.

Once the Board of Directors of national COA approves the application, the branch can begin holding regular meetings. All potential members must be notified by the branch officers of the branch approval and advised to properly affiliate through national COA. This request to affiliate may be made via email to the membership coordinator by each individual member.

Mission

A branch's bylaw mission should be set forth in its bylaws. The bylaws suggested in appendix A specify, to the extent feasible, these purposes:

- To promote the mission of the COA.
- To foster relations among former, retired, active, and ready reserve Commissioned Corps officers.
- To protect the rights and interests of personnel of the USPHS Commissioned Corps and their family members and survivors.
- To serve the community and the nation.

Financial Assistance from National COA

National COA reimburses a newly established branch for necessary and reasonable organizing expenses of up to \$250.

Typical expenses for reimbursement include the cost of stationery, printing and mailing, and minor incidental expenses such as coffee for organizing meetings. Normally, the treasurer of the organizing committee pays for the expenses and after the branch application receives approval, the treasurer submits one reimbursement claim. (To request, please contact national COA's administrative assistant at coamembership@coausphs.org (Contact Us). Supply the following information: Name, address, amount, and explanation combined with receipts. Except when specifically authorized in advance, other than the branch itself, no person or organization is entitled to reimbursement by national COA for expenditures in connection with the establishment of a new branch.

Section Two - Branch Organizing

Branch Name

Select a branch name; keep it short and simple. Consider keeping the name indicative of the branch's location to assist with identification of potential members. Avoid, by implication, laying claim to an unduly large geographic area (otherwise conflicts might arise with existing or future branches nearby). Finally, make sure the majority of members agree on the branch name.

Address

Each branch should have a permanent mailing address and primary email address (typically, that of the branch president). A permanent mailing address helps prevent any interruption of communications when new branch officers assume their duties.

Area Demographics

The branch area is the geographic territory within which the branch normally draws its members. However, individuals living outside the established branch may still be eligible for membership on a case-by-case basis.

Some factors in considering establishment of a branch are geographical features such as rivers and mountains; urban areas; state, county, and city boundaries; density of the COA member population; traffic; proximity to other branches; and presence or absence of a specific PHS duty-station location. Virtual branches can have a group of members with a common bond (i.e., retired NIH officers, overseas officers, sole duty station officers).

National COA is not authorized to limit the branch geographical area. If two (2) branches are near one another, they should work together to reach an agreement on a definitive line of

demarcation for recruiting purposes. In any event, individuals are free to join any branch of choice.

By providing national COA with one or more zip codes from areas focused on by the branch itself, a computer-generated list of unaffiliated COA members can be prepared for a branch to use in member solicitation. These requested lists are generated and sent electronically to the branch officer making said request, to assist in communication with potential branch members. Requests may be made to national COA's membership coordinator coamembership@coausphs.org.

Membership Count

National COA will impose zero restrictions on the size of branches. Branches vary in size from fewer than twenty members to more than 1,000. It is difficult to generalize about the optimum branch size and practical lower and upper limits. However, experience demonstrates that branches with fewer than twenty members have difficulty maintaining viability and undertaking activities. In addition, small branches often struggle with identifying volunteer leaders, which greatly challenges their ability to remain viable.

Section Three - Operating Considerations

Advice of Counsel

The following suggestions are intended to serve as preliminary guidance only and not as legal advice. In instances involving questions related to taxes, incorporation, and other legal matters, branches are urged to seek proper legal advice.

Incorporation

National COA recommends every branch incorporate as a non-profit organization. This is not a legal requirement and many COA branches that have not incorporated exist without issue. An incorporated branch is recognized as a legal entity – a “person” – empowered to enter into and enforce contracts; to acquire, own, and dispose of property; to make investments; and to sue and be sued. Corporate status provides for the legal continuity of the branch and it generally, though not always, protects individual officers, directors, and members from financial liability for the branch's acts.

In view of the complexity of state laws governing this matter, any branch considering incorporation should obtain legal advice from an attorney licensed to practice law in the state of location. Usually, the incorporating process is not especially difficult or lengthy. Articles of incorporation – sometimes known as certificates of incorporation – must be drafted, signed by the number of incorporators, prescribed by state law, and filed with the designated state official, usually the secretary of state. Certain filings and registrations require fees.

A branch's articles of incorporation are separate from its bylaws, but the two documents should be consistent with one another. The articles of incorporation should provide just enough information on the branch to satisfy the state's legal requirements; the bylaws, which are in effect the branch's "constitution," should prescribe the branch's organization and modus operandi in considerable detail.

Most states require organizations of corporate status to file an annual report, which sometimes entails a small fee. Failure to file could result in the involuntary dissolution of the corporation and/or the imposition of financial penalties. All costs and fees are covered by the local branch.

Income Tax Exemption

Local branches with gross receipts in each taxable year no greater than \$5,000 are not required to file IRS Form 1024 to obtain exempt status. In other words, such branches are tax-exempt without any additional steps. National COA recommends that every branch, even those branches not required to file with the IRS, seek to obtain exemption from federal income tax under Section 501(a) of the Internal Revenue Code. National COA strongly encourages consultation with local and appropriate tax authorities.

[IRS Publication 557](#), Tax-Exempt Status for Your Organization, sets forth procedures for obtaining exemption recognition, annual filing requirements, and other information. IRS Forms Distribution Center supplies free copies by calling (800) 829-1040. Also, these forms and publications are available electronically from the IRS website www.irs.gov. An application on IRS Form 1024 should be filed with the appropriate IRS district director. The branch should seek recognition of exemption under Section 501(c) (6) of the Code "as a professional organization to promote the common business purpose of members."

Although National COA is a tax-exempt organization, because National COA does not control the branches, COA is not eligible for a group exemption letter. Each branch must submit its own application to receive exemption.

More Tax Exemptions

Though not likely, any branch with tax-exempt status but gross receipts of more than \$25,000 is required to file an annual information return on IRS Form 990 on or before the 15th day of the fifth month after the end of the accounting period – May 15 if the return covers a calendar year. A branch with tax-exempt status and normal gross receipts of \$25,000 or less is not required to file an annual federal tax return but may be required to file a one-time information statement to certify its annual income level. There are filing requirements for branches, whether tax-exempt or not, with unrelated business income of \$1,000 or more. Unrelated business income is the gross income derived from any trade or business that is regularly carried on and does not substantially relate to the organization's exempt purpose or function. If your branch sells PHS or Commissioned Corps memorabilia, for instance, revenue from those sales would not relate to the purposes for which the branch was granted tax-exempt status by the

IRS. Income of \$1,000 or more must be reported on Federal Form 990-T, Exempt Organization Business Income Tax Return. However, that interest and dividend income earned by tax-exempt organizations is not subject to tax. National COA strongly encourages consultation with local and appropriate tax authorities.

Political Activity

As a condition of its tax-exempt status, national COA cannot engage in partisan political activity. Any similarly exempt branch must recognize that such activity on its part may jeopardize its tax-exempt status. Lobbying, however, is different from supporting a political candidate or party. Lobbying, a permitted activity, is “communicating with a member (or the member’s staff) of a local, state, or federal legislative body for the purpose of influencing the member’s vote on specific legislation.” “Grass-roots lobbying,” another permitted activity, means communicating with members of the public to influence the votes of members of a legislative body. National COA encourages involvement, as individuals in the political process and to lobby their elected representatives concerning issues of importance. It is important to note that no political activity is allowed while an officer is on duty or working in their official capacity.

When advocating at the state and local levels, it is important to remember the legislative priorities of COA. A local branch’s legislative priorities should align with national COA. If national COA’s legislative priorities are unclear, please reach out to national COA for clarification.

Membership Directory

Following the establishment of a new local branch, national COA’s membership coordinator will send the branch officer information provided within the database to the branch president.

Membership Cards

Issuing branch membership cards is not recommended. They serve no real purpose and impose an unnecessary expense and administrative burden on the branch.

Liability Insurance

Tort liability for non-profit organizations – including COA branches, whether they have incorporated or declared tax-exempt by the IRS – is almost exclusively a matter of state law. The scope of protection offered to uncompensated directors and officers by state laws varies greatly. Many apply only to claims of property damage or personal injury and not to other types of conduct, such as libel or slander. Some provide immunity only for uninsured risks while others do not protect uncompensated directors against claims of gross negligence (as contrasted with simple negligence).

Although it enjoys limited statutory protection, a branch’s board, retains its duty to conserve and protect branch assets. This duty is best approached through the concept of “risk management,” which starts with “risk identification” by asking what the branch does that might

result in a lawsuit. While insurance brokers and attorneys can assist, certain common-sense questions come readily to mind:

- Is alcohol served at branch functions?
- If so, is there a designated-driver policy? If so, is it followed?
- Do members provide transportation for other members as a courtesy if alcoholic beverages are consumed?
- Are there internal controls on handling cash?

Once identified, analyze a risk to determine whether to eliminate or reduce the activity to an acceptable level. If it cannot be eliminated or reduced, obtaining insurance is an attractive option. Any branch wishing to purchase liability coverage should start with a local, independent insurance agent, ideally one who specializes in serving non-profit organizations.

Some branches have questioned the availability of a group policy established by national COA. Due to national COA's lack of control over local branches, such a policy is unavailable.

Finally, the nonprofit Risk Management Center developed a website with multiple suggestions, resources, and advice for nonprofits. The online advice site is found at www.nonprofitrisk.org.

Section Four - Branch Governance

Possibilities

There are several ways to effectively organize a branch. While the suggested bylaws (see Appendix A) contain one successful structure, it is not the only option. The discussion in this section, however, is based on Appendix A's organizational structure.

Governing Body

The President, Vice President (or President-elect), Past-President, Secretary, and Treasurer compose the elected officers of the executive committee for each local branch, which functions as a board of directors. Some branches also include a Past-President on the Executive Committee. Elected annually or biennially by the members at an annual meeting, the elected officers should reflect the composition of the membership by rank, gender, etc. Annual and biennial elections both have their pros and cons. Biennial elections give the executive committee more continuity and simplify the process of conducting branch business. Still other options remain, such as changing one-half of the elected officers each year (rather than the entire slate) which provides for a measure of continuity and eases the nominating committee's task in obtaining suitable and willing nominees.

In directing branch affairs, the branch's executive committee is empowered to act for the membership. For important questions such as determining annual dues and establishing positions, the membership should decide, but the executive committee takes the final action on all routine matters. Thus, most of the branch business is transacted at executive committee meetings, not branch general meetings. However, the executive committee is not authorized to adopt resolutions or establish positions in the name of the branch.

Normally, the executive committee holds monthly meetings, even if the branch meetings are less frequent. The branch president chairs all executive committee meetings. The branch newsletter (if one is published) reports to the membership any proceedings of general interest from the meeting, or the president reports on these proceedings at the next regularly scheduled branch meeting.

Chairpersons of all standing committees should participate at executive committee meetings but are not entitled to vote, unless otherwise qualified.

Elected Officers

The elected officer positions below must be filled by current national COA members:

- President
- Vice President or President-elect
- Secretary
- Treasurer

The membership shall elect officers at a scheduled meeting. The installation of these newly elected officers should take place at the next branch meeting immediately following branch approval and should align with the national COA fiscal year, July 1 to June 30. The branch officer update form is located on the Local Branch webpage of the COA website and must be completed and submitted to the national COA membership coordinator at coamembership@coausphs.org. National COA current members must fill elective officer positions.

Section Five - Officer Positions

President

The President must chart a course for the branch, stimulate new programs and projects, and appoint effective committees for all activities. The branch president's selection is, therefore, critical. The president's principal duties are as follows:

- Serve as the branch's chief elected officer.

- Preside at meetings of the branch and the executive committee.
- Appoint all standing and special committees.
- Serve as an ex-officio member, with right to vote on all committees except the nominating committee.
- Communicate to the branch or the Executive Committee information or proposals which, in the president's opinion, would help in achieving the goals of the branch.
- Serve as the branch's principal contact with the national COA board of directors.
- Perform other duties necessary.

Terms

The suggested bylaws in appendix A do not limit the number of consecutive terms a branch president may serve, though a branch can certainly include a provision addressing term limitations of a president. Whether it is in the branch's best interest for one individual to serve two (2) or more consecutive terms as president is open to consideration. Certainly, there are former and present branch presidents who have served their organizations with great dedication and energy for several years. As a rule, having an interested and competent individual as president is more important than following a routine that directs elections at specified time periods. However, there are distinct benefits of having regularly scheduled elections and installing new leadership at specified intervals. Branches and their executive committees must decide independently what is best for them.

Vice President or President-Elect

The vice-president or president-elect prepares to assume the duties of president if the president vacates the position temporarily or permanently. The president-elect will assume the office of president when the current president's term expires.

The vice president or president-elect serves as an executive committee member and performs any duties the president assigns. A common and highly recommended practice is for the vice president or chair-elect to serve as chairperson of one of the more important standing committees such as the membership committee.

Some branches follow a policy, of professionally developing selected members for president by advancing them upward through a sequence of offices. For example, one year an individual serves as vice-president and the next year occupies the office of president. In the case of president-elect, this individual will occupy the office of president the next year (or term). The suggested bylaws in appendix A do not provide for this practice but it could be easily included. Under such a practice, by the time the person assumes the presidency, they would be more familiar with the branch's programs and operations.

If the branch follows this policy, the nominating committee (if a branch has one) takes great care in the selection a president-elect (or vice -president), recognizing that the elected candidate will eventually assume the position of branch president.

Secretary

The secretary is a key individual in the operation of a branch. With the position's numerous responsibilities, the workload may be heavy, and the secretary's performance directly affects the branch's success in all activities. The secretary's principal duties are as follows:

- Provide to the membership timely written notification of all annual, regular, and special branch meetings (generally by means of the branch newsletter).
- Maintain a record of all proceedings at branch and executive committee meetings.
- Provide to executive committee members timely written notification of all meetings of the committee.
- Provide updated information on branch officers and advise of a new term of office following elections, to national COA by utilizing the form available at: <http://www.coausphs.org>. Maintain an accurate listing of all branch members.
- Prepare any correspondence required.
- Maintain correspondence files for the branch.
- Prepare any reports and returns that might be required of the branch by law.
- Safeguard all important records, documents, and valuable equipment (such as US and PHS flags) belonging to the branch.
- Perform other duties commensurate with the office or as might be assigned by the executive committee or branch president.

When the secretary's workload is particularly heavy, as in the case of a large branch, the president can consider designating another individual to function as assistant secretary.

Treasurer

The treasurer's principal duties are as follows:

- Maintain a record of all monies received and expended by the branch.
- Make disbursements authorized by the branch or executive committee.
- Deposit all sums received in a financial institution approved by the executive committee (see chapter four: finance).
- Make a financial report at branch meetings.
- Recommend to the executive committee, whenever appropriate, new, or revised financial policies.

- Recommend to the executive committee for approval, a budget for each calendar year.
- Recommend to the executive committee, whenever necessary or appropriate, changes to the approved budget.

The funds, books, and vouchers maintained by the treasurer are subject to inspection and verification by the executive committee which can include a formal audit. Audits should be performed every four (4) years or whenever a new treasurer is elected. The treasurer can be bonded at the discretion of the executive committee, but this precaution is normally not necessary.

Branches shall have the option of including elected positions on the executive committee, in addition to the above-referenced elected positions (i.e., member-at-large to chair various sub-committees).

CHAPTER THREE: Meeting & Activities

Section One - Meeting Ideas

Conforming to Members' Desires

Any plans for branch meetings and other activities should reflect members' preferences. However, no activity or the frequency, type, time, and place of the meetings can please the entire membership. Therefore, the goal should be to please as many members as possible.

In the case of a recently established branch, an easy and effective way to determine members' desires is to conduct a survey. Even after a branch is well-established and its patterns set, occasional use of a questionnaire can give branch officials revealing and helpful information about the possible changing preferences of members.

Frequency of Meetings

There are no clear rules regarding frequency of meetings (unless prescribed in the bylaws). However, please be respectful of agency and /or Commissioned Corps Headquarters wishes to have the meeting outside of official duty hours. Whatever the frequency, a branch should plan them on a certain day, at a certain time (e.g., 4:00 p.m. on the last Thursday of the month, every other month, etc.). A regular schedule enhances attendance because members can rely on a scheduled time and place.

Types of Meetings

- **Social Meetings:** A popular type of branch meeting is a dinner meeting for members, significant others, and guests. A social hour followed by a guest speaker usually precedes dinner. A less common form of branch meeting is a luncheon meeting. This event sometimes involves members, significant others, and guests, though other occasions call just for members. A social hour is customary before the meal and often includes a guest speaker. These types of meetings are social in nature with occasional business matters raised from time to time. A branch, however, must attempt to spice up its program of activities every now and then to encourage attendance.
- **Business Meetings:** Though not required in branch bylaws, branches should consider annual meetings at separate times (the sample bylaws, appendix A, does not include a required annual meeting). This is clearly a business meeting, as opposed to the social meetings discussed above. In addition, branches may need to plan regular or special business meetings from time to time to deal with important issues.

There is nothing wrong with planning an annual or other business meeting in conjunction with a social function, but it would be advisable to first have one, then the other. The best plan may be to schedule the business meeting first with only members present, followed by a social function.

The following is a suggested order of business for an annual or regular business meeting:

- Call to order
- Invocation
- Pledge of allegiance
- Reading, correction, and approval of minutes of previous meeting
- Reports of officers
- Reports of standing committee chairpersons
- Reports of special committee chairpersons
- Unfinished business
- New business, including (for an annual meeting) the election of officers
- Announcements
- Adjournment

The order of business for a special business meeting should consist only of the call to order, consideration of the items of business stated in the notice of the meeting, and adjournment.

The current edition of Robert's Rules of Order Newly Revised, unless they are inconsistent with the branch's bylaws or any special rules of order adopted by the branch, should govern the conduct of business.

CHAPTER FOUR: Finance

Section One - Financial Advice

Financial Independence

Every COA branch is an independent, self-governing, and self-supporting organization. National COA provides no financial assistance.

Bank Account

All branches should have in place a business checking account in the name of the branch and install the treasurer and president (and other officers as desired) with signature authority.

Operating Costs

A branch's operating costs depend on the size of the branch, the nature and extent of its activities, and various other factors. Here is a list of items to consider in estimating operating costs:

- Banking fees for a branch bank account
- Procurement of stationery, forms, and other supplies needed for administration
- Rental of a post office box and postage
- Printing costs (e.g., bylaws, membership directories, membership solicitation materials, newsletters)
- Token gifts for guest speakers
- Special branch activities
- Contributions to the Commissioned Officers Foundation (COF) or other charity of the branch's choice
- Flowers for ill or for families of deceased members
- Gifts for retiring officers
- Initial purchase of memorabilia or other items for fundraising activities

Sources of Funds

To meet operating expenses, branches rely almost entirely on the annual dues paid to them by members, though some branches also may have investment income. However, branches should try to have some type of moneymaking project to augment dues income. In this regard, branches can raise additional funds by doing the following:

- Conducting raffles and/or selling chances (please follow state laws regard these).
- Setting prices for meals to make a small profit.
- Selling advertising space in the newsletter (money received from this activity is unrelated business income under the Internal Revenue Code).
- Selling soft drinks or food items at local community functions.
- Selling local branch COA memorabilia.

Please remember to follow Agency and Commissioned Corps Headquarters ethics rules regarding COA local branch fundraising.

Dues

Each branch sets its own dues. These are entirely separate from the dues paid for membership to national COA and are not deductible under the Internal Revenue Code.

Most branch dues range from no applicable local dues to twenty dollars per year.

National COA, as a service to local branches, collects local dues payments from COA members in conjunction with the annual collection of national dues. This service is designed to alleviate the burden that would be imposed on the local branches if they were required to contact and collect dues from their members. The only compensation received by national COA for this service is the retention, by national COA, of any interest that might accrue during the time the money is held between distributions.

National COA will distribute the full dues collected on behalf of each branch upon request to national COA's administrative assistant at www.coausphs.org, (Contact Us).

Appendix A

Suggested Bylaws –

For the most recent template, visit the COA website, Local Branch webpage.

Appendix B

To submit or update all branch information, please complete the Branch Officer Update (BOU) form found on the COA website, Local Branch page.

Appendix C

Guidelines for working with local media

While the primary reason for local service programs is not publicity, the community efforts do provide an opportunity for the public to learn more about the Commissioned Corps' role in public health.

Read up on the issue and identify which reporters' cover stories that are on related topics. Sometimes newspapers break down reporters' beats by small local areas, sometimes by subject area. Some newspapers also have special sections set aside for individuals involved in community outreach projects.

You can also send the release to local television stations as well as radio stations that do local news reports (see sample form below). Some areas also have cable television news stations that cater to local news. Always follow up with a phone call to make sure the reporter has received the release. Since you will likely reach voice mail, have a 20-second "pitch" ready to leave on the phone highlighting the importance of this activity and why you are doing it.

Write the news for journalists and media, not as articles or stories. Keep the press release short and no more than one page of maximum 350 words. Include details in the press release that would make it interesting to the readers of that paper or audience of that broadcaster. Do not use hype or promotional language. Remember, their audience must care about what you have written. Ask yourself, "is this news-worthy? Does it attract people to read your news?" Include contact information at the end of the release, so that the reporter can call for details or follow-up.

Timing: If you think the activity itself would be interesting enough for the reporter to cover, send or fax the release directly to the reporter five to seven days in advance. Also send a copy to the assignment editor. It never hurts to send the press release to more than one reporter – the editor will make the final decision as to who will cover the event. You can also send the news release after the event, but make sure you deliver it to the newspaper no more than a day or two (2) later. It is good to send the newspaper several high-resolution photos (color or black & white). If the paper is not a daily, find out what the deadline is (i.e., Wednesday at noon for a Friday morning weekly) and have your materials in time for the reporter to make the deadline.

Working with reporters can be frustrating, but also gratifying when you read an article that highlights your activity. Reporters are busy and usually on tight deadlines. While they may sound rude at times, often they are simply trying to get a story filed by the deadline and they do not have time to talk. The best time to call a reporter is between 10 a.m. and noon. Do not hesitate to nag a little – the squeaky wheel often gets the grease.

Remember you are representing the Commissioned Officers Association and not USPHS or the government when speaking to the press. If you are speaking to the media representing USPHS, please follow the USPHS policy. If you have any doubt, reach out to national COA or CCHQ.

Send a copy of the article/news release to COA headquarters once they are published.

Appendix D

Sample Press Release Template

[Your Logo Here]

FOR IMMEDIATE RELEASE: (date)

[Title Here]

(Example: XYZ Inc announces health fair <>)

Description: (optional) This is a very short description about the press release. Some distribution sites will ask for this.

[CITY], [STATE], [Date] – [This is the opening paragraph. It should contain about 3-5 lines and considered most important since this grab's attention of news readers and journalists. Typically questions for questions of who, what, when, where and why answered here. Keep it short and highlight what's whole release is all about.]

[This paragraph goes into little depth. Give more details of product or any events taking place. This should contain about two comments made by spokespersons. For example, Mr. XXX said "xxx."]

[This paragraph focuses on where users can find detailed information about events. Give a contact or website site for more information so that more additional information can be found. This paragraph should be concluded within 3-5 lines]

[The conclusive paragraph is known the "boilerplate" and can contain no more than 2-3 lines. A short "about" section, providing independent background on the issuing organization, or individual. Here you should explain future aspects. In general, what you intend to do achieve.]

Contact Information:

[Branch Name]

[Address]

[Telephone]

[Website]

###

(This mark lets the reader know that it is the end of the article.)

APPENDIX E

Challenges Branches Might Face and Possible Solutions

The ability to attract members to a meeting varies from location to location. While the problem is more acute for smaller branches, simply because of the limited number of people to draw from, it also affects larger branches. Below are some problems experienced by branches, and some suggestions for ways to deal with them:

Challenge: Branch members are spread out, resulting in poor communication.

Possible Solutions: Communication can be easily achieved using email. The branch can prepare a mass email to potential and current members (email addresses are included in lists provided to branches). National COA's website offers a link for branches who have their own website, to include their own branch link. Creating a local branch Facebook page is free and easy. These links are also made available in the branch section of national COA's website. Meetings can also occur on virtual platforms in lieu of in-person. Perform an analysis of where your members are. Think about doing an activity specific to those officers.

Challenge: Poorly attended meetings.

Possible Solutions:

- Email network to provide information and promote contact with members.
- Vary the locations of the branch meetings to where your members are. Virtual gatherings and meetings are becoming more commonplace and can help bridge the gap between occasions held in person.
- Have your members RSVP for the meetings.
 - Explore why members are declining to attend.
- Vary the frequency of the meetings (but follow the minimum as prescribed in the bylaws).
- Organize conference calls or virtual meetings to connect those who cannot make a meeting in-person.
- Appoint representatives responsible for communicating information and updates to officers in their designated area.
- Prepare a newsletter for distribution among branch members.

Challenge: Lack of interest among local branch members.

Possible Solutions:

- Survey local members to find issues of interest and concern (obtain speakers/plan events to address these issues).
- Plan social/community events and include significant others and family members.
- Involve retired officers in meetings, events, and speaking engagements.
- Participate or sponsor community-wide activities.
- Emphasize the importance of COA membership and participation in activities.
- Invite a senior leader of the National COA or USPHS to the meeting to speak. This could include retired and well-recognized former USPHS leaders.

Challenge: High officer turnover rate in a geographic area.

Possible Solutions:

- Prepare materials for newly transferred officers to orient them with the area and the local branch.
- Reach out to newly transferred officers by personally inviting them to meetings and events.

Suggestions for Branch Meeting Topics

As mentioned above, meetings can occur for business or social purposes, or a combination of both. Branches are sometimes looking for ideas for special topics, guest speakers, etc., to enliven a meeting. Below are suggestions:

COA Membership/Benefits Overview

Speakers

- COA Executive Director or Board Member (Contact national COA at www.coausphs.org)
- COF Executive Director or Board Trustee

Hints: (1) Provide COA representatives with a list of topics and points of interest and concern prior to their arrival so they can prepare any specific material;
(2) Arrange insurance presentation (s) in conjunction with a financial planning, retirement, or “new officer” seminar.