



U. S. Coast Guard Chief Petty Officers Association

Chapter Officer Guide

Congratulations on becoming a Chapter Officer! Things may be a bit overwhelming at first, so we've compiled some information that will help guide you in your new role.

1) Purpose:

- The purpose of a Chapter is to take care of Coast Guard Members and their dependents who may be in urgent need of assistance, financial or otherwise; to assist in recruiting for the United States Coast Guard; support the aims and goals of the Chief Petty Officers Academy; to assemble for social functions; become involved in community affairs; promote social programs for those in need; and keep informed on United States Coast Guard matters; whereby we may continue to serve in loyalty to the Nation and the United States Coast Guard. Our motto is *"In respect for those who have gone before us and as a guide for those who follow."*

2) National Contacts:

- Your [Regional Advisor](#) is the go-to person when you need assistance or guidance.
- The [Executive Director](#) (Randy Reid) is responsible for the day-to-day operations of the Association. He is also the editor of *The Chief*.
- National has a Membership Coordinator (Julie Behre) that can assist you with such things as obtaining a Chapter roster, checking the status of members, and enrolling new members. If you have any membership issues, send her an [email](#) or call her at (703) 941-0395.
- Our [webmaster](#) is responsible for all things regarding our website. Contact him if you wish to develop a Chapter page, hosted on National's main site. Ensure that you notify him of any changes to your Chapter President's contact info.

3) Conducting Chapter meetings:

- Meetings should be conducted according to Parliamentary Procedures as outlined in [Robert's Rules of Order](#).

4) Membership:

- a) CCTI is a great time to recruit new members. We have compiled a *Guide to Recruiting, Retaining, and Rewarding CPOA Members* that can be found on our [website](#). Also, the National office now has membership booklets that can be handed out. Please contact [Julie](#) and she'll send you as many as you need.

5) Taxes and Reporting responsibilities:

- The CPOA is a not for profit organization ("war veterans"- designated 501(c)(19)) and can receive tax deductible contributions.
- If a vendor you're working with requests documentation, please contact the Executive Director who can provide what is needed. Many times, all a vendor needs is for you to provide them a [W-9](#) with your Chapter Name, physical address, and Employee Identification Number ([EIN](#)). In filling out the form, ensure to choose "Other" on line 3 and type "501(c)19". Sometimes, they may request [National's non-profit designation letter](#).
- The Executive Director manages all aspects of each Chapter's Tax ID number, or EIN. At the beginning of each year, he will reach out to Chapter leadership via your Regional Advisor, requesting your Gross Receipt Report stating whether your Chapter made more or less than \$50K in the previous calendar year. If you made more than \$50K, your Chapter will be required to file taxes using your EIN. If not, your EIN will fall under our Group Exemption and the Executive Director will submit your annual 990-N (e-postcard) to the IRS. If you have any questions concerning your EIN, or proper reporting requirements, please don't hesitate to contact the National Office at (703) 941-0395, or send him an [e-mail](#).
- Guidance on how long to keep Chapter financial records can be found here: <https://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/How-long-should-I-keep-records>

6) Articles for *The Chief*:

- There are 4 yearly editions of *The Chief* (01 January, 01 April, 01 July, and 01 October). To ensure your Chapter's article or photos are included, please send them to National **at least** 30 days prior to the edition date. The sooner you send your submissions in, the greater chance they will be included.

7) Newsletter submissions:

- National's monthly e-newsletter reaches over 9,500 email addresses. If you have a large event that you wish to drive traffic to, please submit it to the [Executive Director](#).

8) Annual Convention

- The Annual Convention of the CPOA is where all Association Business is completed. Our current format is a Membership Meeting where every member in good standing has privilege of the floor and voting rights on all issues brought before the assembly.

- Although not mandatory, it is a responsibility of each Chapter to provide representation of their membership to the Annual Convention. It is recommended the Chapter President or other Chapter Officer attend all Annual Conventions for the purpose of becoming fully informed and aware of the inner workings of our Association. Attendance is supported by the Coast Guard with the issuance of Permissive Orders.
- Albeit cost is a consideration, a simple fundraising effort should provide sufficient funding for the Chapter to be properly represented.

9) Other:

- a. More specific information on the structure of the CPOA can be found in our [Operations Manual](#) and/or [By-Laws](#).