

COMMISSIONED OFFICERS ASSOCIATION
District of Columbia Branch

General Standard Operating Procedures



Document Approvals

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Revision No.: The numeric designation identifying the version of a controlled document. New documents are assigned “Rev. 00”. Subsequent approved revisions of the same document are assigned sequential numbers, “Rev. 01”, “Rev. 02”, etc.

Revision Date: The date that the DC COA President accepts the document into the Document Control System by applying the final approval signature.

References

[DC COA Home Page](#)

[DC COA Governing Documents](#)

- DC COA General Standard Operating Procedures
- DC COA Bylaws

[Committee Standard Operating Procedures](#)

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SECTION 1

PURPOSE

The purpose of this District of Columbia Branch of the Commissioned Officers Association (DC COA) General Standard Operating Procedures (SOP) is to provide internal guidance for the operations and procedures of all DC COA committees. This SOP provides guidance on matters not addressed by the DC COA Bylaws.

The broadest possible committee guidelines are established in the [DCCOA Bylaws](#).

Each Committee SOP establishes the operational and procedural guidance for the respective committee.

SECTION 2

FORMAL RECOGNITION

2.1 Minimum Requirements for Formal Recognition

2.1.1 Officers shall have current DC COA membership.

2.1.2 Officers shall participate in the committee event(s) as active participants as determined by the Committee Chair.

2.2 Types of Formal Recognition and Procedures

2.2.1 Event-Specific Certificate of Appreciation (COA)

A. After receiving the Attendance Sheet (see Section 5.3 of this document) from the DC COA Google Drive Team on the first of the month, the event lead after confirming the accuracy and completeness of the Attendance Sheet shall email the following information to the Awards Committee Chair(s) requesting issuance of COAs.

- i. The Attendance Sheet that includes date and name of the event, and a list of names, ranks, role, and email addresses of members and civilian participants who have successfully completed a DC COA sponsored event; and
- ii. Exact language of recognition on the certificate outlining specific characteristics or achievements of the award recipient for the specific event.

- B. The Awards Committee will verify the officer participants' current DC COA membership before developing and issuing the COAs.
- C. The COAs shall be issued within 30 calendar days from the date of the submission request. The COAs are distributed to the requestor for verification and distribution to individual recipients.
- D. Only one COA per officer will be awarded for each event.
- E. Officers may choose to volunteer for an activity/event without being a current member of the DC COA Branch; however, such officers will not be officially recognized by the DC COA for their participation.

2.2.2 End-of-year Certificate of Appreciation (COA)

- A. In May of every operational year, each committee chair will review and update the list of committee members who have actively participated in the committee and ensure that the rank, name, and position title of each committee member on record is accurate.
- B. The committee chair will submit the updated list of committee members to the Awards Committee Chair(s) via email with the name of the committee in the subject heading of the email (e.g., Subject: *DC COA Finance Committee*) by May 31.
- C. The Awards Committee will verify each officer's current DC COA membership before developing and issuing the COAs.
- D. Only one end-of-year COA per officer per committee will be awarded.
- E. Officers may choose to volunteer to be involved with a committee without being a current member of the DC COA Branch; however, such officers will not be officially recognized by the DC COA for their participation.

2.2.3 End-of-year Letters of Appreciation (LOA)

- A. A committee member who has made a significant contribution to DC COA as determined by DC COA President (or delegate) shall be recognized and issued an LOA instead of a COA at the end of the operational year.
- B. In May of each operational year, committee chairs and other DC COA leadership shall identify officers deserving of an LOA instead of COAs and email the following information to the DC COA President (or delegate) and the Awards Committee chairs:
 - i. Names and ranks of members; and
 - ii. Exact language of recognition on the letter outlining specific characteristics or achievements of the award recipient for the operational year.

- C. The DC COA Awards Committee shall verify committee members' current DC COA membership before developing and issuing the LOAs to the DC COA President for final verification and distribution. Only one annual LOA per officer per committee will be awarded. Other types of recognition may be warranted in addition or instead of an LOA as determined by the DC COA Board of Directors (Board).

SECTION 3 TERMINATION

3.1 Inactive Participants

- 3.1.1 Any committee member who frequently misses meetings or fails to perform a task assigned by committee chair or other DC COA leadership without just cause can at the discretion of the DC COA President, in consultation with the Board and applicable DC COA leadership, will be asked to voluntarily resign or be terminated from their position in the DC COA. Such inactive participants will also be considered ineligible for the committee's end-of-year COA or LOA.
- 3.1.2 See Article VI, Section 5 of the Bylaws for additional information on Termination of Board members.
- 3.1.3 See Article VII, Section 3 of the Bylaws for additional information on Termination of Committee Chair/Co-Chair.

3.2 Termination Procedure of Inactive Participants

- 3.2.1 Committee Chair, after consultation with their respective Board member, will email the DC COA President requesting termination of the inactive officer.
- 3.2.2 DC COA President will officially notify the officer by email informing of their inactive status and asking if they would like to continue to participate in the respective committee(s).
- 3.2.3 Those officers wishing to remain an active part of a committee should provide a timely reply within 30 calendar days of notification stating continued interest and desire to still be considered as an active participant. Lack of reply within 30 days of notification shall terminate the officer from their position in the DC COA.
- 3.2.4 After expressing continued interest and desire to still be considered as an active participant, the officer shall then maintain active participation in the respective

committee(s) for the remaining term of their position. If the officer does not maintain active participation for the remaining term, Committee Chair may again request DC COA President to terminate the inactive officer from their position in the DC COA. The DC COA President, after receiving majority concurrence from the Board, may terminate the inactive officer from their position in the DC COA.

3.3 Special Considerations

3.3.1 These guidelines are intended to encourage active participation in the committees; however, it is recognized that there may be individual cases that warrant special considerations (e.g., weekly scheduling conflict, extended deployment, officer in a clinical billet, etc.) where an officer is not able to make enough meetings, but substantially contributes to the committee. Therefore, the Committee Chair reserves the right to utilize discretion in determining whether an individual has met the standard of participation.

SECTION 4

COMMITTEE LEADERSHIP DUTIES AND TRANSITION PROCEDURES

4.1 Duties and Responsibilities

4.1.1 Board Liaison:

- A. Shall provide high level oversight and guidance to their assigned Committee Co-Chairs
- B. Shall establish deliverables/goals for the operational year with assigned Committee Co-Chairs
- C. Shall establish check-in intervals and methods (e.g., in-person, phone, email, or web meeting) at the beginning of each operational year with assigned Committee Co-Chairs
- D. Shall set up and meet with Committee Co-chairs on a regular interval (e.g., monthly) for “check-in” on committee updates.
- E. Shall serve as the point-of-contact (POC) for new affairs/inquiries from other DC COA committees and outside chartered groups
- F. Shall assist Committee Co-Chairs with their duties (e.g., drafting/editing documents, sending out emails, attending meeting) when co-chairs are unable to do so
- G. Shall serve as liaison between the assigned Committee and the Board to assist in any procedural dialogues and communicate any concerns/questions that arise during the operational year

- H. Shall review draft operational year budget and submit to the Treasurer for review and approval by the Board
- I. Shall review funding request forms and associated reimbursement documentation and submit to Finance Chair
- J. Shall participate in committee meetings
- K. Shall attend, or ensure their alternate is present at, each DC COA leadership or Board meeting, ensures written committee updates are provided to the Executive Secretary at least a week prior to the meetings, and coordinate verbal committee updates are provided at the meetings
- L. Shall coordinate with the assigned Committee Co-Chairs and other DC COA committees to ensure efficient use of resources

4.1.2 Committee Chair:

- A. Shall propose and discuss activities/deliverables/goals for upcoming operational year with the assigned Board Liaison
- B. Shall draft operational year budget for Board Liaison review
- C. Shall facilitate funding request and reimbursement process by soliciting/completing funding request forms and submitting them with the associated reimbursement documentation to Board Liaison
- D. Shall review ad hoc committee activity proposals, and discuss and come to agreement on whether to approve/disapprove the activity with Board Liaison
- E. Shall recruit, provide trainings/resources, and retain committee members
- F. Shall maintain committee and subcommittee membership roster, including records of committee activities needed to issue Certificates/Letters of Appreciation (COA/LOA)
- G. Shall establish and maintain standard operating procedures (SOPs) for the committee
- H. Shall provide management and oversight of committee members' work to ensure timely progress of activities
- I. Shall set up and lead committee meetings, and provide meeting notes afterward
- J. Shall review and approve advertisement, announcements, surveys, and communications, including upcoming events, before sending them to the Communications Committee
- K. Shall serve as the POC and communicate with standing subcommittees for upcoming events
- L. Shall conduct post-event follow up including mediating the awards (COA/LOA) request
- M. Shall attend DC COA leadership/Board meetings and provide written/verbal committee updates

- N. Shall ensure effective knowledge management/transfer by updating committee documents (e.g., SOPs and templates) in the DC COA “Google Drive” official archival system.
- O. Shall ensure that the information in the DC COA website for the committee is accurate and up to date

4.2 Transition Procedures

- 4.2.1 Incoming Committee Leadership Orientation – Incoming committee leadership orientation guidelines and practices shall be established for each committee and shall include the review of following topics between the outgoing and incoming committee leadership:
 - A. Discussion of all duties and responsibilities for the position
 - B. Review of the governing policy, practice, and procedures including DC COA Bylaws, DC COA General SOP, and committee-specific SOP
 - C. Review of past accomplishments and current work of the committee
 - D. Review of committee member assignments
 - E. Recommendations for future Subcommittee Leads
 - F. Review of standards used for accepting new committee members
 - G. Identification of available resources
- 4.2.2 Outgoing Committee Leadership Responsibilities – After providing orientation to the new committee leadership, the outgoing Board Liaison/Committee Chair shall:
 - A. Remain available to answer questions from the new committee leadership when needed
 - B. Provide historical perspective for decisions that were made by the committee in the past

SECTION 5 GENERAL OPERATIONS

5.1 Funding Requests and Reimbursement

- 5.1.1 When additional funding beyond the approved annual budget for an event or item is identified that needs additional funding, the event leads and/or subcommittee chair should contact the current finance chair in order to obtain an internal or external funding request form to fill out in its entirety.
- 5.1.2 Once the form is completed, the finance committee chair initiates a vote from the Executive Committee (EC) for funding requests under \$100, or the Board for funding requests \$100 and above (typically a 1–2-week process). During that

time, the finance committee chair coordinates communications between requestor and the Board if the Board members have any additional questions about the request.

- 5.1.3 Once the voting has ended, the finance committee chair informs the requestor and Treasurer of the status (e.g., approved or disapproved).
- 5.1.4 If approved, the requestor should proceed with the purchase/event and maintain all receipts.
- 5.1.5 Invoices and receipts for all DC COA financial transactions and disbursements shall be immediately sent to the Treasurer in a timely manner. The requestor should work with the treasurer to ensure the correct recipient receives reimbursement.
- 5.1.6 A request for funding should be approved by the EC or Board prior to committing personal funds. Failure to attain approval may result in non-reimbursement.
- 5.1.7 If disapproved, the requestor may resubmit an amended request for consideration.

5.2 ListServ Announcements

- 5.2.1 To request that a Commissioned Corps related announcement distribution be distributed via the DC COA ListServ, please send an email to DCCOAemail@gmail.com. Requests received by each Friday by 1700 (5 PM EST) will be posted to the Listserv the following week Friday at 1700 (5 PM EST) weekly. Any announcement submissions requests received after the deadline will be included in the following week's announcements. Requests follow these guidelines: Please use the following submission guidelines when submitting:
 - A. Provide a title for your announcement (e.g., Job Vacancy, Award Information, Volunteer Opportunity).
 - B. Provide a brief description of your announcement that includes all pertinent information as applicable to the event stating WHO, WHAT, WHEN, WHERE, DETAILS, ATTIRE (as applicable), ACTIVITIES (as applicable), POC (as applicable and contact information), and ACTIVITY LEAD (as applicable).
 - C. Indicate an end date for the announcement. Otherwise, announcements are reposted until the date of the activity.
 - D. For urgent requests, type "URGENT" in the subject line to request an immediate announcement and state whether to include it in the weekly email announcement.
 - E. Include pertinent informational website links and/or attachments as necessary.

NOTE: Any member can request to be added to the DCCOA listserv or DCCOA Facebook page to receive the Branch's updates and announcements by contacting the DCCOA Email Subcommittee or Facebook Subcommittee Chair, or by sending an email to dccoaemail@gmail.com.

5.3 DC COA Event/Activity Attendance Sheet and After-Action Report

5.3.1 DC COA Attendance Sheet

- A. At the event, have participants individually scan the QR Code in Appendix 2 or use this link: [Attendance Sheet](#)
- B. Follow the directions presented on the screen
- C. If you have any technical issues, please contact DCCOAUSPHS@gmail.com
- D. The DC COA Google Drive Team will send the attendance sheet to the event leads on the first of every month.

5.3.2 DC COA After-Action Report

- A. Within 2 weeks after the event, have the lead scan the QR Code in Appendix 3 or use this link: [After Action Report](#)
- B. Follow the directions presented on the screen
- C. If you have any technical issues, please contact DCCOAUSPHS@gmail.com

5.4 Archives

- 5.4.1 The DC COA official "Google Drive" is the official archival system to store documents and collaborate on committee documents. Each committee will be responsible for its own folder.
- 5.4.2 If a committee chair requires access to the respective committee's Google drive folder, please send an email requesting access to dccoausphs@gmail.com and copy the Policy and Procedures Committee leads.
- 5.4.3 Committee leads can provide access to their Google drive to their committee volunteers by using the "share" feature. More details are provided on the official work instructions.
- 5.4.4 Support will be provided by a Policy and Procedures Committee volunteer on a case-by-case basis.

SECTION 6

GENERAL SOP REVIEW AND AMENDMENTS

6.1 Updates to the DC COA General SOP

6.1.1 The Policy & Procedures Committee shall be responsible for maintaining and updating the DC COA General SOP in consultation with the EC.

6.1.2 Any DC COA leadership may request a review of the General SOP and suggest a change to the General SOP through correspondence with the Policy & Procedures Committee. If deemed worthy of further review, such a review shall occur with drafting of new proposed language. The proposed language will then be reviewed and approved by both the EC and the Board.

6.2 DC COA General SOP Review

With facilitation of the Policy & Procedures Committee, the EC and the Board shall review the General SOP every other year to ensure the SOP is up-to-date and adequate to meet the needs of DC COA.

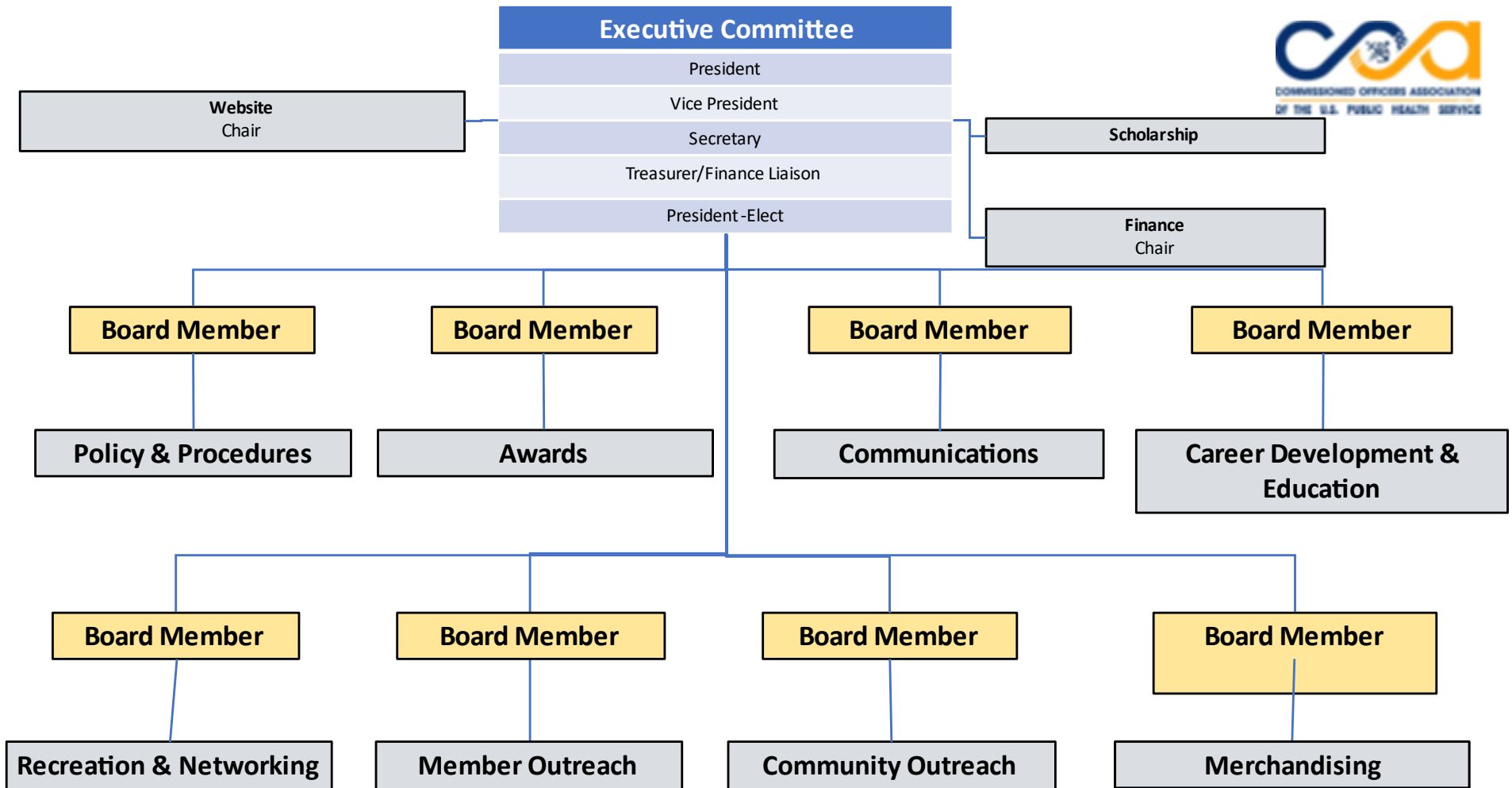
6.3 Approval

Any changes, other than minor changes described in Section 9.4, requires a simple majority vote of the EC and Board.

6.4 Minor Changes

Minor editorial changes to the General SOP (i.e., to correct spelling or grammar or to clarify unclear wording) may be made without requiring a vote.

APPENDIX 1: DC COA Organizational Chart



APPENDIX 2: DC COA ATTENDANCE SHEET



<https://forms.gle/rKzQ9QA5U2yezLYi8>

APPENDIX 3: DC COA EVENT AFTER ACTION REPORT:



<https://forms.gle/naXPdMnpkeSoHjsP8>