

## MONDAY 10 AUGUST 2015

**Opening Ceremonies:** - At 0900, 10 August 2015, Master Of Ceremonies YNCM Forrest Croom (Ret.) welcomed the convention attendees and guests.

**Parading of Colors, National Anthem & Pledge of Allegiance:** Color Guard, consisting of FS2 Zachary Kappler, SK3 J. Marlin Weeks, YN3 Aurelia and SN Blaine Green, paraded the Colors.

**Invocation:** - YNCM Forrest Croom gave the invocation.

**Award:** - National President YNC Kim Lorigan (Ret.) presented Certificates of Appreciation to the Color Guard.

**Preambles:** - National CPOA President read the CPOA Preamble.

National CGEA President YN2 Carly Beer read the CGEA Preamble.

**Memorial Service:** YNCM Croom conducted the Memorial Service fore those members who had "Crossed the Bar" during the past year. CWO2 Mark Tahtinen played Taps.

**Introductions:** YNCM Croom introduced the Past National Presidents, Gold Lifetime Members, the CPOA National Board of Directors, CGEA National Officers, the attendees who have been members of the Association for 25 years or more, LCDR Lisa Garcez Commanding Officer Coast Guard Institute, and LCDR John Bannon.

**Gold Lifetime Member Award:** - MCPO-CG Rick Trent was presented his Gold Lifetime Membership Card and Certificate by GLM Tim Lackey.

CPOA National President read a proclamation from the Mayor of Oklahoma City.

**Convention Dedication:** - CPOA National President dedicated the 47<sup>th</sup> National Convention to the following personnel:

BMCM Ib Andersen, ADCM Victor Bearinger, MKCM Jim Bridges, YNCM Billy Jones, LCDR John Klemm, CWO Matthew "Skip" Martin, ASMCS William Roberts, and QMC Theodore Wood.

**Award Presentations:** - CPOA National President presented the following awards:

Chapter with the largest % of new members:

1<sup>st</sup> Place Cape May

2<sup>nd</sup> Place Low Country

3<sup>rd</sup> Place Hampton Roads

Chapter with the largest increase in members:

- 1<sup>st</sup> Place Cape May
- 2<sup>nd</sup> Place Low Country
- 3<sup>rd</sup> Place Martinsburg West Virginia

Individual recruiting the largest number of new members:

- 1<sup>st</sup> Place OSCS Cory Gunkle
- 2<sup>nd</sup> Place AMTC Robert Holder
- 3<sup>rd</sup> Place BMCS Jack Crowley

CPOA National President announced that 193 Association members received their 25 year pins this year.

CGEA National President presented the following awards:

Branch with the largest % of new members:

- 1<sup>st</sup> Place Elizabeth City
- 2<sup>nd</sup> Place Empire State
- 3<sup>rd</sup> Place Mobile

Branch with the largest increase in numbers:

Rock and Roll

Individual recruiting the largest number of new members:

- 1<sup>st</sup> Place SK2 Jamie Speaks
- 2<sup>nd</sup> Place AMT3 Justin Lawrence
- 3<sup>rd</sup> Place YN2 Casey Lawrence

CPOA National President introduced CGRF-MC Eric L. Johnson as our guest speaker. CPOA National President presented CGRF-MC Johnson with a gift from the CPOA and CGEA following his remarks.

AT 0950, 10 August 2015, the CPOA National President declared the 47<sup>th</sup> National Convention of the United States Coast Guard Chief Petty Officers Association and the 15<sup>th</sup> National Convention to the United States Coast Guard Enlisted Association, convened.

*0955 Recessed*

*1125 Reconvened*

At 1130, the Honorable Mary Fallin, Governor of Oklahoma, presented a Proclamation for the Coast Guard and the CPOA/CGEA, and addressed the Convention delegates and guests. CPOA National President presented Governor Fallin with a gift from the CPOA and CGEA following her remarks.

*1153 Recessed until 1300*

*1315 Reconvened*

Roll call of National Board of Directors:

National President: YNC Kim Lorigan – Present  
National Vice President: YNC Alex Chapman – Present  
National Secretary: YNCS Bruce Garrison – Present  
National Treasurer: CWO2 Mark Tahtinen – Present  
Region 1 Advisor: BMCS Jack Crowley – Present  
Region 2 Advisor: ITCM Al Bumgardner – Present  
Region 3 Advisor: HSCM Tyrone Anderson – Present

Roll call of Chapter:

The following Chapters were present:

Boston, Cape May, Elizabeth City, Hampton Roads, Hawaiian Islands, Los Angeles/Long Beach, Martinsburg West Virginia, Mobile +1, Oklahoma City +3, San Juan, SE Connecticut, Seattle, St Louis, Yorktown +1, Members at Large 2. Total 21

Quorum established as 11.

The following Chapters were not present:

Alexandria, Baltimore, Cape Cod, Crystal Coast, Gold Country, Golden Gate, Golden Triangle, Grand Haven, Greater Detroit, Green Bay, Jersey Shore, Juneau, Ketchikan, Kleckner, Kodiak, Lone Star, Long Island, Lost Coast, Low Country, Lower Columbia River, Marianas Guam, Miami, Mid America, New Orleans, North Bend, North Coast, Northeast Florida, Northern New England, Petaluma, Port Angeles, Prince William Sound, San Diego, Silverdale, SOO, Southernmost, South Texas, St Petersburg, USCG Desert CPO Bahrain, Washington DC, Western Lake Michigan.

Motion by BMCS Womack to only call the Chapter present at the initial roll call.  
Motion seconded by YNC Murphy. Motion carried.

The Convention minutes from Thursday 14 August 2014, were presented. (Encl. 1)

Motion by MCPO Sheffler to accept the minutes as written. Motion seconded by YNC Murphy. Motion carried.

National President YNC Kim Lorigan (Ret.), gave the President's Report on the State of the CPOA. (Encl. 2)

1330 MCPO-CG Trent arrived and was seated.

National Treasurer CWO2 Mark Tahtinen provided the Treasurer's Annual Report. (Encl. 3)

Executive Director Randy Reid provided his Annual Report. (Encl. 4)

National Board of Director's Motion #1 (Member in Good Standing Privileges) was brought to the floor. Motion was discussed and voted on. Motion carried. (Encl. 5)

National Board of Director's Motion #2 (Use of Association Emblems) was brought to the floor. Motion was discussed and voted on. Motion carried. (Encl. 6)

Alexandria Chapter's Motion to (Remove the Pledge of Allegiance for Section VII, Operation Manual "Meetings") was brought to the floor. The motions was discussed and voted on. Motion defeated. (Encl. 7)

Motion by MCPO Sheffler, seconded by YNC Murphy, to note in the minutes that Alexandria Chapter's motion was defeated unanimously by the delegated in attendance at the convention. Motion carried.

North Coast member arrived and was seated.

*1438 Recessed*

*1457 Reconvened*

USAA representative MCPO Greg Pratt (US Navy Ret.) addressed the Convention delegates on USAA's involvement and support of the COPA and CGEA.

*1527 Recessed until 0800, 12 Aug 2015*

## WEDNESDAY 12 AUGUST 2015

*0800 Reconvened*

Roll call of National Board of Directors:

National President:	YNC Kim Lorigan – Present
National Vice President:	YNC Alex Chapman – Present
National Secretary:	YNCS Bruce Garrison – Present
National Treasurer:	CWO2 Mark Tahtinen – Present
Region 1 Advisor:	BMCS Jack Crowley – Present
Region 2 Advisor:	ITCM Al Bumgardner – Present
Region 3 Advisor:	HSCM Tyrone Anderson – Present

Roll call of Chapters:

The following Chapters were present:

Boston, Cape May, Elizabeth City, Hampton Roads, Hawaiian Islands, Lone Star, Los Angeles/Long Beach, Martinsburg West Virginia, Mobile +1, Oklahoma City +2, SE Connecticut, Seattle, St Louis, Yorktown +1, Members at Large 2. Total 21

A quorum was established.

The following Chapters were not present:

Alexandria, Baltimore, Cape Cod, Crystal Coast, Gold Country, Golden Gate, Golden Triangle, Grand Haven, Greater Detroit, Green Bay, Jersey Shore, Juneau, Ketchikan, Kleckner, Kodiak, Long Island, Lost Coast, Low Country, Lower Columbia River, Marianas Guam, Miami, Mid America, New Orleans, North Bend, North Coast, Northeast Florida, Northern New England, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, SOO, Southernmost, South Texas, St Petersburg, USCG Desert CPO Bahrain, Washington DC, Western Lake Michigan.

The minutes from 10 August 2015, were distributed and the following corrections were made:

Page2: a space was added between of and “Oklahoma”.

Page 2: “YNCM Murphy” was changed to read “YNC Murphy”.

Page 2: “convnetion” was change to read “convention”.

Page 2: a space was added between "the Treasurer's" to read "National Treasurer CWO2 Mark Tahtinen gave the Treasurer's Annual report".

Page 3: "YNCM Murphy" was changed to read "YNC Murphy".

Motion by MCPO Sheffler to accept the minutes as amended. Motion was seconded by CWO Hamilton. Motion was voted on and carried.

BMCS Jack Crowley presented the Special Projects Standing Committee Report. (Encl. 8). Report accepted as submitted.

BMCS Jack Crowley presented the Special Projects Convention Committee Report. (Encl. 9). Report adopted.

*0815 Recessed*  
*0824 Reconvened*

MCPO Al Bumgardner presented the CPO Academy Standing Committee Report. (Encl. 10). Report accepted as submitted.

MCPO Al Bumgardner presented the CPO Academy Convention Committee Report. (Encl. 11). Report was amended to add the word "Standing" before Committee in paragraph 4a. Report adopted as amended.

CWO2 Lewis presented the CCCAF Convention Committee Report. (Encl. 12) Report adopted.

BMCS Womack presented the Long Range Planning Convention Committee Report. (Encl. 13) Report adopted.

*0857 Recessed*  
*0909 Reconvened*

0910 CWO Jerry Lewis arrived and was seated.

CPOA National Vice President presented the By-Laws Committee Convention Report. (Encl. 14) Report adopted.

MCPO Al Bumgardner presented the Annual Membership Standing Committee Report. (Encl. 15)

National President YNC Kim Lorigan declared paragraph 4b out of order.

Paragraph 4b was struck from the report and sub paragraphs were re-lettered.

The second paragraph 4 was renumbered paragraph 5 and paragraph 5 renumbered paragraph 6.

Report accepted as amended.

CGEA National CGEA President presented the Membership Convention Committee Report. (Encl. 16)

Paragraph 2 the word “way” was corrected to read “ways”.

Paragraph 2 b, the word “leter” was corrected to read “letter”.

Paragraph 2 e, the word “Directors” were changed to read “Advisors”.

Paragraph 2 f, the work “cooroporation” was change to read “cooperation”.

Paragraph 2 g, the word “advisors” was change to read “Advisor”.

Report was adopted as amended.

Bellevue University representative, Mr. Willie Woodford, was introduced and addressed the Convention delegates.

Mr. Gary Williams, author of “Guardian of Guadalcanal”, addressed the Convention delegates on SM1 Douglas Munro, the Coast Guard’s only Medal of Honor Recipient.

*1047 Recessed*

*1330 Reconvened*

Roll Call of National Board of Directors:

National President:	YNC Kim Lorigan – Present
National Vice President:	YNC Alex Chapman – Present
National Secretary:	YNCS Bruce Garrison – Present
National Treasurer:	CWO2 Mark Tahtinen – Present
Region 1 Advisor:	BMCS Jack Crowley – Present
Region 2 Advisor:	ITCM Al Burgardner – Present
Region 3 Advisor:	HSCM Tyrone Anderson – Present

Roll call of Chapters:

The following Chapters were present:

Boston, Cape May, Elizabeth City, Hampton Roads, Hawaiian Islands, Los Angeles/Long Beach, Martinsburg West Virginia, Mobile +1, Oklahoma City +1, SE Connecticut, Seattle, St Louis, Yorktown, Members at Large 3. Total 19

A quorum was established.

The following Chapters were not present:

Alexandria, Baltimore, Cape Cod, Crystal Coast, Gold Country, Golden Gate, Golden Triangle, Grand Haven, Greater Detroit, Green Bay, Jersey Shore, Juneau, Ketchikan, Kleckner, Kodiak, Lone Star, Long Island, Lost Coast, Low Country, Lower Columbia River, Marianas Guam, Miami, Mid America, New Orleans, North Bend North Coast, Northeast Florida, Northern New England, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, SOO, Southernmost, South Texas, St Petersburg, USCG Desert CPO-Bahrain, Washington DC, Western Lake Michigan.

CGEA President presented the CGEA Convention Committee Report. (Encl. 17). Report adopted.

CPOA National Treasurer presented the Budget Convention Committee Report. (Encl. 18). Report adopted.

*1408 Recessed until 0900, 13 August 2015*



## THURSDAY 13 AUGUST 2015

### *0907 Reconvened*

#### Roll call of National Board of Directors:

National President: YNC Kim Lorigan – Present  
National Vice President: YNC Alex Chapman – Present  
National Secretary: YNCS Bruce Garrison – Present  
National Treasurer: CWO2 Mark Tahtinen – Present  
Region 1 Advisor: BMCS Jack Crowley – Present  
Region 2 Advisor: ITCM Al Bumgardner – Present  
Region 3 Advisor: HSCM Tyrone Anderson – Present

#### Roll call of Chapters:

#### The following Chapters were present:

Boston, Elizabeth City, Hampton Roads, Hawaiian Islands, Lone Star, Los Angeles/Long Beach, Martinsburg West Virginia, Mobile +1, North Coast, Oklahoma City +4, SE Connecticut, Seattle, St Louis, Yorktown, Members at Large 3. Total 22

A quorum was established.

#### The following Chapters were not present:

Alexandria, Baltimore, Cape Cod, Cape May, Crystal Coast, Gold Country, Golden Gate, Golden Triangle, Grand Haven, Greater Detroit, Green Bay, Jersey Shore, Juneau, Ketchikan, Kleckner, Kodiak, Long Island, Lost Coast, Low Country, Lower Columbia River, Marianas Guam, Miami, Mid America, New Orleans, North Bend, Northeast Florida, Northern New England, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, SOO, Southernmost, South Texas, St Petersburg, USCG CPO Desert-Bahrain, Washington DC, Western Lake Michigan.

A motion by MCPO Sheffler, seconded by CPO Segelken to accept the minutes of Wednesday 12 August 2015. Motion carried.

CPO Segelken presented the Convention Convention Committee Report. (Encl. 19)  
Report adopted as corrected.

Motion by BMCS Womack, seconded by MCPO Lackey, MCPO Croom and MCPO Bumgardner, to reconsider the Membership Standing Committee Report. Motion carried.

Motion by MCPO Sheffler seconded by MCPO Dave Isherwood to amend the Membership Standing Committee Report. (Encl.15). Motion carried.

*0930 Recessed*

*0935 Reconvened*

After discussion by the National Board of Directors it was recommended that the Membership Standing Committee Report be sent back to the Standing Committee for clarification on how to implement paragraphs 3b and 4b.

National Board of Directors recommendation to send the Membership Standing Committee Report back to the Standing Committee was discussed and approved by the delegates.

## **GOOD OF THE ORDER**

### **Installation of new National CPOA Board of Directors and new National CGEA Officers:**

The following National CPOA Board of Directors and National CGEA Officers were installed by outgoing National Vice President YNC Alex Chapman:

#### **National CPOA Board of Directors:**

National President:	YNC Kim Lorigan
National Vice President:	HSCM Tyrone Anderson
National Secretary:	YNCS Bruce Garrison
National Treasurer:	CWO2 Mark Tahtinen
Region 1 Advisor:	BMCS Jack Crowley
Region 2 Advisor:	MKCM Dave Isherwood
Region 3 Advisor:	CWO2 Amy Ponce

#### **National CGEA Officers:**

National President:	DC1 Michael Lewis
National Vice President:	SK1 Joel Webber
National Secretary:	YN3 Laurin Malone
National Treasurer:	YN2 Casey Lawrence

*0950 Recessed*

*1007 Reconvened*

CPOA National President announced the President's Outstanding Chapter for 2015 was Cape May Chapter. The award was presented at the Convention Dinner.

CPOA National President announced the President's Outstanding Branch for 2015 was Elizabeth City Branch. The award was presented at the Convention Dinner.

CPOA National President announced that Yorktown Chapter had taken 1<sup>st</sup> Place in the Large Chapter Category and Oklahoma City Chapter had taken 1<sup>st</sup> Place in the Small Chapter Category.

All Gold Lifetime Members in attendance provided remarks on the Convention.

The Walt Gore throw-in for CCCAF netted a total of \$2000.00. (Thank you to all who participated)

All Past National Presidents in attendance provided remarks on the Convention.

CPOA National President asked those in attendance to provide their remarks.

Motion to adjourn by the CPOA National Secretary, seconded by YNC Chapman.  
Motion carried.

1125, 13 August 2015 - the 47<sup>th</sup> National CPOA and 15<sup>th</sup> National CGEA Convention were adjourned.

Respectfully Submitted

YNCS Bruce Garrison, (Ret.)  
National Secretary

Enclosures:

- (1) Convention Minutes from Thursday 14 August 2014
- (2) President's Report on the State of the CPOA
- (3) Treasurer's Annual Report
- (4) Executive Director's Annual Report
- (5) National Board of Director's Motion #1
- (6) National Board of Director's Motion #2
- (7) Alexandria Chapter's Motion
- (8) Special Projects Standing Committee Report
- (9) Special Projects Convention Committee Report
- (10) CPO Academy Standing Committee Report
- (11) CPO Academy Convention Committee Report
- (12) CCCAF Convention Committee Report
- (13) Long Range Planning Convention Committee Report
- (14) By-Laws Convention Committee Report
- (15) Annual Membership Standing Committee Report
- (16) Membership Convention Committee Report
- (17) CGEA Convention Committee Report
- (18) Budget Convention Committee Report

**(19) Convention Convention Committee Report**

## THURSDAY, 14 AUGUST 2014

*0901 reconvened*

Roll call of National Board of Directors:

National President: YNC Kim Lorigan – Present  
National Vice President: YNC Alex Chapman – Present  
National Secretary: YNCS Bruce Garrison – Present  
National Treasurer: SKC Mark Tahtinen – Present  
Region 1 Advisor: BMCS Jack Crowley – Present  
Region 2 Advisor: CMC Al Bumgardner – Present  
Region 3 Advisor: HSCM Tyrone Anderson – Present

Roll call of Chapters: The following Chapters were present: Cape May (2), Elizabeth City (1), Golden Gate (1), Hampton Roads (8), Hawaiian Islands (1), Lost Coast (1), Martinsburg West Virginia (1), Mobile (1), North Coast (2), Oklahoma City (1), Petaluma (1), Seattle (1), Southernmost (1), ST Louis (1), Washington DC (2), Yorktown (4), Members at Large (4). Total present: 32 Quorum established

The following Chapters were not present: Alexandria, Baltimore, Boston, Crystal Coast, Gold Country, Golden Triangle, Grand Haven, Greater Detroit, Green Bay, Jersey Shores, Juneau, Ketchikan, Kleckner, Kodiak, Lone Star, Long Island, Los Angeles/Long Beach, Low Country, Lower Columbia River, Marianas Guam, Miami, Mid America, New Orleans, North Bend, Northeast Florida, Northern New England, Port Angeles, Prince William Sound, San Diego, San Juan, SE Connecticut, Silverdale, SOO, South Texas, ST Petersburg, USCG Desert CPO Bahrain, Western Lake Michigan.

0907 Lone Star Chapter arrived and was seated.

Motion by Cape May, seconded by Mobile to accept the minutes of 13 August 2014 as printed.  
**Carried**

By Laws Convention Committee Report. **NO REPORT.**

Budget Convention Committee Report was presented by SKC Mark Tahtinen.

Committee Chairman advised that paragraph 7(c) be struck from the report and 7(d) be renumbered 7(c). Report **adopted** as amended. Encl: (16)

*0936 recessed*

*1005 reconvened*

The National President YNC Kim Lorigan and Convention Committee Chairman QMC Bill Selgelkin recognized the Hotel Staff for the outstanding support during the convention.

CGEA National President YN2 Carly Beer address the convention delegates.

*ENCLOSURE (1)*

Enclosures

- 1) Minutes from 15 August 2013
- 2) National President's Report
- 3) National Treasurer's Report
- 4) Membership Standing Committee Report
- 5) Executive Director's Annual Report
- 6) SKC Tahtinen's Motion to amend the Operations Manual
- 7) Mobile Chapter's Resolution No. 1
- 8) QMCM D'Elia's Motion to amend the Operations Manual
- 9) Special Project's Convention Committee Report
- 10) Coast Guard's Culture of Respect and Integrated Team
- 11) Membership Convention Committee Report
- 12) Convention Convention Committee Report
- 13) CPO Academy Convention Committee Report
- 14) CCCAF Convention Committee Report
- 15) Long Range Planning Convention Committee Report
- 16) Budget Convention Committee Report
- 17) CGEA Review Convention Committee Report



United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION

5520 Hempstead Way

Springfield, VA 22151-4009

Phone: (703) 941-0395 / Fax: (703) 941-0397

Email: [kimlorigan7@gmail.com](mailto:kimlorigan7@gmail.com) (CPOA National President)

[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)



10 August 2015

From: CPOA National President  
To: All CPOA & CGEA Members

Subj: PRESIDENT'S REPORT ON THE STATE OF THE CPOA

1. As required by the CPOA Operations Manual, this interim report is submitted to the Association's membership.
2. **MEMBERSHIP:** Currently, the CPOA/CGEA membership stands at 9870 (8376 CPOA / 1494 CGEA), with one new Gold Lifetime Member, MCPOCG-7 Rick Trent, and 6 new Silver Lifetime Members. The CPOA mourned 251 members who crossed the bar this year. Our Association welcomed six new Branches since 1 August 2014: Arabian Gulf (Bahrain); Rock N' Roll (Cleveland, OH); Atchafalaya (Morgan City, LA), Main Street Tower (Norfolk, VA); Marianas Island (Guam) and Motor City (Detroit, MI).
3. **CCCAF:** We had three winners for the 2015 CCCAF Scholarships this year: \$5000 First Place to Ms. Danielle Domini, daughter of MKC Frederick Domini (Long Island Chapter); \$2500 Second Place to Mr. Connor Dempsey, son of CWO4 Jack Dempsey (Ret.) (MAL), and \$1000 Third Place to Ms. Jessica Jackson, daughter of AMTC Jeffery Jackson (Hawaiian Islands Chapter). A big "THANK YOU!" also goes out to the CCCAF Chairman, MKCS JD Warren who once again ran a flawless program and to Committee Members OSCS John Hurley, SKC Anthony Lim, MKCS Maria D'Angelo, EMC Kevin Basil, SKC Tamara Heckel, MKC Mark Lavalley, AET1 Jose Colon and YN3 Casey Lawrence who read and judged all 25 essays.
4. **CPO ACADEMY SPIRIT OF THE CHIEF AWARDS PROGRAM:** The CPOA has provided six awards for Active Duty Classes and one Reserve Class Award since last year. The Spaghetti Dinner Program endures due to the hard work of the Petaluma Chapter members and through the generous funding provided by of our other CPOA Chapters.
5. **COMMUNITY SERVICE:** Our CPOA Chapters and CGEA Branches continue to do amazing work in our communities, donating their funds and efforts to various charities in 2014-2015. Some of the charities were (to name a few):

Coast Guard Enlisted Memorial at Cape May, NJ	CG Run to Remember
Flags Across America	Annual Wreaths Across America
Habitat for Humanity	Holiday Food Baskets for CG families
Seniors Holiday Dinner (Juneau's 40 <sup>th</sup> annual event)	Fisher House
HH-6535 Memorial	Food Pantries
6. **FINANCIAL ISSUES:**
  - a. Our Association closed out FY-2014 with a \$7,487 surplus and as of this date, FY-2015 is on course to be solidly in the black. Many thanks to CPOA Treasurer SKC Mark Tahtinen and Randy Reid for their outstanding budgetary efforts!
  - b. Chapter and Branch EIN Reinstatements: Four Chapter/Branch EINs are still awaiting reinstatement by the IRS. Chapters and Branches are reassured that this issue does not preclude them from fundraising.
  - c. The BOD voted to postpone the 2015 financial review as a Review was completed in August 2014 with no discrepancies noted. The next scheduled Financial Review will be in 2018.
7. **WEBSITE / SOCIAL MEDIA INITIATIVES**
  - a. *The Chief* – our Association's quarterly magazine continues to receive positive reviews.
  - b. Monthly Newsletter – the CPOA/CGEA Newsletter provides timely information to over 7400 Association members. Please contact the National Office and provide your (preferably personal) e-mail address if you would like to be added to the e-mail list.
  - c. CPOA Website – While we continue to receive many positive comments regarding our website, our web managers have determined it will cost our Association less and we will be better served by changing web hosts. After careful review of possible hosts, the decision was made to move to WordPress in January 2016. This will be a seamless transition with no interruption in service. Once the transfer is complete, it is anticipated that the Members Only page (with digital magazine capabilities) and Presidents Only page (with best practices, forms, etc) will be available by July 2016. My thanks to the CPOA webmanager, CWO Michael Babischkin, newly advanced BMC Phillip Null, the CGEA webmanager (congratulations, Chief!) and Webmaster Emeritus QMCM Joe D'Elia for all their dedication and hard work.

IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW

ENCLOSURE (2)

Subj: PRESIDENT'S REPORT ON THE STATE OF THE CPOA

d. Facebook / LinkedIn – the CPOA Facebook page currently has over 2275 likes and our LinkedIn page has 1383 members. Both continue to serve as great venues to keep our membership informed about Association events, as well as attracting new and former members.

8. **ONE LEGAL ISSUE OF NOTE:** Chapters and Branches are advised that they may NOT accept donations (money or items of value) when the intent is for said donation to be provided to another organization or entity. We have had two instances this past year where a Chapter was approached about a donation intended for use by a Coast Guard unit. Regulations state that it is illegal for the Coast Guard to accept donations from outside sources. According to Mr. Ed Lippert, the CPOA's attorney, this would be an inappropriate use of the CPOA Chapter's non-profit status and constitutes a violation of IRS regulations, which puts our Association at risk of losing our status as a 501(c)(19).

**GUIDANCE FOR CHAPTERS & BRANCHES:** Chapters/Branches may accept donations and donate them to other organizations or to Coast Guard members as long as these guidelines are observed:

- 1) the Chapter/Branch receives the donation directly from the donor;
- 2) no other organization or entity (Coast Guard or otherwise) is involved in discussion of or subsequent transfer of the donation to the Chapter/Branch; and
- 3) the Chapter/Branch has absolute discretion over the final disposition of a donation, as approved by a majority of members voting at a monthly Chapter/Branch meeting.

For any questions or concerns regarding this issue, please contact the CPOA President or your Regional Advisor.

9. **THE COAST GUARD CHIEF PETTY OFFICERS (CGCPO) FOUNDATION:** The CPOA BOD has authorized the establishment of the **CGCPO Foundation**, a 501(c)(3) entity, to serve as a charitable arm of our Association, separate from but complementing our existing 501(c)(19) Association.

The discussion of the CPOA Foundation began when CWO Fred Mann, a long-time CPOA member, contacted me to discuss leaving the CPOA an annuity to establish the **FRED MANN FAMILY LUCKY BAG (FMFLB) Fund**, a benevolent fund to assist members of our Coast Guard community in need. While we were grateful for CWO Mann's generosity, our Association is not authorized to accept such donations as IRS regulations stipulate that donations of this type can only be gifted to a tax-deductible 501(c)(3).

The CPOA attorney, Mr. Ed. Lippert has completed the Articles of Incorporation and the request for Incorporation has been approved by the Commonwealth of Virginia. The next step will be to request IRS approval of the CGCPO Foundation as a 501(c)(3). Mr. Lippert recommended that the Foundation be governed by a five-person Board of Directors which will be tasked with oversight of the FMFLB Fund. These Board members will be affiliated with the CPOA (though membership is not require), and will be completely separate from the CPOA BOD. The members of the CPOA Foundation Board of Directors who have graciously volunteered to serve are:

Mrs. Janet Cantrell  
SCPO Nia Stemley, USCG

MCPO Forrest Croom, USCGR (Ret.)  
PO2 Carly Beer, USCG

MCPO Jason Wong, USCG

The CPOA President will serve as a sixth but non-voting member on the Foundation Board, and the CPOA Board of Directors will direct the CPOA Executive Director to provide administrative support on an interim basis. The CGCPO Foundation Board of Directors will conduct business via email and conference calls. Work continues regarding the Foundation's By Laws, which will include guidance for the Board of Directors' authority and scope of work, but it is anticipated that the Board will serve in an oversight capacity for the FMFLB Fund and other contributions donated for education and charitable purposes. Association members who serve on the FMFLB Fund Standing Committee will be tasked with reviewing and approving grant requests, and will report such actions to the CGCPO Foundation Board of Directors for ratification. The CGCPO Foundation has been set up to allow the CPOA the latitude to establish other 501(c)(3) funds in the future, with considerably less paperwork.

As to the FMFLB Fund, it will start out small (\$200 block grants) but it is envisioned that the program will grow since, as a 501(c)(3), the Foundation will be eligible to participate in Combined Federal Campaign (CFC) in future years. Furthermore, CWO Mann has directed that all members of the Coast Guard family shall be eligible to request financial assistance, regardless of membership in the CPOA.

This program will further the CPOA's reputation as an Association committed to serving our fellow Coast Guard men and women and their families. Further information regarding the Coast Guard Chief Petty Officers Foundation will be provided as progress is made. Any questions or concerns should be directed to the CPOA National President.

**IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW**



10 August 2015

Subj: PRESIDENT'S REPORT ON THE STATE OF THE CPOA

10. In closing, our Association has made much forward progress over the last few years. Our Chapters and Branches continue to give their best to keep our Association strong and thriving, and our members are second to none. I am honored to serve as your President, and thank you for your continued support of the CPOA and CGEA.

Yours in Service,

//s//  
YNC Kim Lorigan (Ret.)

**IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW**



United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION  
5520 Hempstead Way  
Springfield, VA 22151-4009



Phone: (703) 941-0395 / Fax: (703) 941-0397  
Email: [coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (Exec. Director)  
[cpoamembership@gmail.com](mailto:cpoamembership@gmail.com) (Membership)

5 August 2015

From: National Treasurer

To: Chief Petty Officers Association Membership

Subj: ANNUAL REPORT

1. The following is the financial standing of the CPOA as of August 5, 2015:

2. Current Assets:

TD Bank	Small Bus. M.Market	0.25%	SilverLT	\$64,111	
	High Yield Savings	0.60%		\$182,953	
	Companion Checking	0.05%		\$1,500	
Navy Fed	CD	5/17/2018	3.34%	CCCAF	\$27,673
	CD	5/17/2018	3.34%	CCCAF	\$27,673
	CD	7/17/2016	1.15	SilverLT	\$106,850
	CD	7/17/2016	1.15	SilverLT	\$106,850
PENFED	M.Market	5/27/2015	0.80%		\$107,554
BofA	Checking				\$19,480
	Bus. Interest Maximizer	0.15%	CCCAF	\$24,924	
	Bus. Interest Maximizer	0.30%	Reserve	\$57,022	
Sub Total:					\$726,590
Real Estate assessed value:					\$231,200
Total:					\$957,790

3. The 2016 CPOA Budget was printed in the July 2015 edition of "THE CHIEF" to allow members to review and ask questions prior to Convention.

ENCLOSURE (3)

4. Purchase of the Office copy machine at the end of the contract was approved by the Board of Directors and will be submitted to the Conention Committee for action. This expense will occur in the 2015 budget.

Sincerely yours,



M. T. Tahtinen, CWO2(F&S), USCG

Encl: (1) 2013-2015 Budget

## Coast Guard Chief Petty Officers Association

## Account Listing

Old GL Codes	Account	Budget CY2013	Actual CY2013	Budget CY2014	Actual CY2014	Budget CY2015	Actual CY2015	Budget CY2016
INCOME								
300-010	Membership Dues							
	Active-Duty Allotments	\$70,000.00	\$73,540.24	\$73,000.00	\$78,075.99	\$75,000.00	\$34,323.85	\$77,000.00
	Cash/Checks	\$40,000.00	\$47,126.40	\$43,000.00	\$47,100.31	\$45,600.00	\$20,341.85	\$45,600.00
	Credit Card Payments	\$4,500.00	\$5,993.00	\$5,000.00	\$5,000.00	\$6,000.00	\$2,718.80	\$6,000.00
	Retiree Allotments	\$90,000.00	\$94,731.00	\$95,000.00	\$93,575.50	\$95,000.00	\$38,725.00	\$97,000.00
	Members Dues payments online	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$988.80	
	Silver Lifetime Purchases (Held at TD Bank)	\$3,000.00	\$4,750.00	\$4,500.00	\$2,067.00	\$3,000.00	\$0.00	\$3,000.00
	Sales of Product Income - Café Press	\$0.00	\$714.72	\$300.00	\$102.02	\$350.00	\$102.02	\$350.00
	The CHIEF Advertising Income	\$1,500.00	\$3,600.00	\$2,400.00	\$3,200.00	\$2,000.00	\$1,900.00	\$2,000.00
	USAA - Sponsorship (Affinity Program)		\$13,189.97	\$14,600.00	\$14,402.75	\$15,000.00	\$11,917.27	\$15,000.00
	Interest Earned							
	Companion Checking Interest	\$0.00	\$373.21	\$0.00	\$0.00	\$0.00	\$1,517.80	\$0.00
	High Yield Savings TD Bank Interest	\$0.00	\$371.91	\$468.00	\$575.82	\$0.00	\$95.60	\$0.00
	Reserve Fund Boa Interest	\$0.00	\$102.15	\$132.00	\$52.49	\$0.00	\$23.26	\$0.00
	Silver Lifetime TD Bank CD Interest (deleted)	\$0.00	\$1,784.11	\$3,600.00		\$0.00		\$0.00
	Silver Lifetime TD Bank Interest	\$0.00	\$173.67	\$156.00	\$115.92	\$0.00	\$26.86	\$0.00
	Navy Fed CD #1 Matures 5/17/2018		\$217.91	\$0.00	\$0.00	\$0.00		\$0.00
	Other Ordinary Income	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
	BOA Checking Account	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
	BOA Interest Maximizer Savings	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
	Pentagon Federal CD's when converted into High Yield Savings	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00
	Total INCOME:	\$209,000.00	\$246,668.29	\$242,156.00	\$244,165.78	\$241,950.00	\$112,681.11	\$245,950.00
715-010	CONVENTION EXPENSES							
	Awards	\$0.00	\$2,110.65	\$1,500.00	\$1,056.15	\$2,000.00	\$1,479.89	\$1,000.00
700-010	President's Outstanding Chapter/Branch Incentive	\$1,800.00		\$1,500.00		\$1,000.00		\$1,000.00
705-010	Convention Committee Expenses (Mailing Materials)	\$15,000.00	\$9,022.79	\$8,500.00		\$18,000.00		\$8,750.00
	CPOA National BoD Expenses (includes tvl, per diem, hotel, President		\$1,505.42				\$1,655.38	
	Vice-President							
	Secretary		\$1,411.90					
	Treasurer		\$1,299.19					
	Regional Advisor: Region 1		\$1,782.05					
	Regional Advisor: Region 2		\$1,493.45					
	Regional Advisor: Region 3		\$1,530.78					
707-010	CGEA National Officer Expenses (includes tvl, per diem, hotel, President	\$4,500.00	\$4,674.60	\$4,500.00		\$7,000.00		\$5,000.00
	Vice-President		\$2,145.21					
	Secretary		\$1,340.21					
	Treasurer		\$1,189.18					
710-010	Executive Director	\$2,000.00	\$1,389.99	\$1,300.00	\$1,076.26	\$1,500.00	\$605.20	\$1,500.00
	Total Convention Expenses:	\$23,300.00	\$30,895.42	\$17,300.00	\$16,082.15	\$31,000.00	\$3,740.47	\$18,250.00
550-010	NATIONAL EXPENSES: CPOA BoD TRAVEL							
	National Officers	\$12,000.00		\$7,000.00		\$7,000.00		\$6,500.00
	President		\$3,412.51				\$480.26	
	Vice-President		\$0.00				\$1,005.96	
	Secretary		\$1,163.81				\$1,089.46	
	Treasurer		\$801.04				\$929.53	
	Regional Advisor: Region 1							
	Regional Advisor: Region 2		\$917.01				\$627.21	
	Regional Advisor: Region 3		\$1,535.46				\$916.87	
550-030	NATIONAL EXPENSES: CGEA TRAVEL	\$2,000.00		\$2,000.00		\$4,000.00		\$3,715.00

Coast Guard Chief Petty Officers Association  
Account Listing

Old GL Codes	Account	Budget CY2013	Actual CY 2013	Budget CY2014	Actual CY 2014	Budget CY2015	Actual CY 2015	Budget CY2016
	President		\$587.74		\$869.60		\$1,335.92	
	Vice-President				\$642.06		\$750.11	
	Secretary		\$776.00		\$0.00			
	Treasurer				\$872.50			
	Total CGEA/CPOA Travel:	\$14,000.00	\$9,193.57	\$9,000.00	\$8,967.28	\$11,000.00	\$7,135.32	\$10,215.00
	<b>NATIONAL EXPENSES (OPERATIONS)</b>							
445-010	Building Repair & Maintenance	\$2,000.00	\$3,813.37	\$2,000.00	\$4,681.05	\$2,000.00	\$2,009.59	\$2,000.00
535-010	Computer Equip & Software	\$3,000.00	\$409.70	\$2,000.00	\$39.99	\$2,000.00	\$4,235.77	\$1,500.00
440-010	Condo Association Fees	\$1,500.00	\$2,738.78	\$3,000.00	\$497.96	\$3,000.00	\$506.42	\$3,000.00
515-010	Credit Card Processing Fees	\$0.00	\$269.73	\$300.00	\$876.41	\$300.00	\$563.81	\$500.00
505-010	Membership Processing Expense	\$2,000.00	\$976.30	\$1,000.00	\$405.27	\$1,000.00	\$41.87	\$750.00
	Membership: Electronic Communications (Constant Contact)		\$1,186.00	\$1,500.00	\$1,268.50	\$1,500.00	\$696.27	\$1,500.00
	Memorial Fund	\$1,000.00	\$500.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00
565-010	National CPOA BoD Discretionary	\$300.00		\$500.00	\$300.00	\$1,000.00	\$0.00	\$500.00
595-020	National CGEA Officers Discretionary	\$500.00		\$500.00	\$50.00	\$1,000.00	\$0.00	\$500.00
530-010	Office Equipment & Furnishings	\$1,500.00	\$6,848.74	\$7,000.00	\$6,525.18	\$7,000.00	\$2,910.66	\$1,500.00
510-010	Office Machine Repair (Includes maintenance contracts)	\$7,000.00	\$1,236.40	\$1,500.00	\$1,338.34	\$1,500.00	\$1,873.51	\$1,500.00
525-010	Office Supplies	\$4,000.00	\$383.52	\$1,500.00	\$605.40	\$1,500.00	\$239.70	\$1,000.00
	Online Accounting Service (QuickBooks & Payroll)		\$1,137.00	\$0.00	\$378.00	\$0.00	\$276.00	\$0.00
	Payroll (Inuit) -		\$1,640.06	\$1,800.00	\$1,754.07	\$1,800.00	\$896.12	\$1,800.00
460-010	Phone and Internet Bundle	\$2,500.00	\$8,720.64	\$10,000.00	\$8,778.93	\$12,000.00	\$-3,266.43	\$8,800.00
500-010	Postage (includes equipment rental)	\$11,000.00	\$105.00	\$200.00	\$242.88	\$200.00	\$55.00	\$200.00
540-010	Publications (Off pubs, Roberts Rules, etc)	\$200.00						
	Employee Pay & Benefits		\$52,758.55	\$71,000.00	\$75,599.60	\$73,000.00	\$40,232.45	\$75,000.00
480-010	Salary (Executive Director)	\$68,712.00		\$4,300.00		\$4,400.00	\$2,539.77	\$4,400.00
480-020	Employee Retirement Account	\$4,205.00		\$3,000.00	\$588.76	\$3,000.00	\$935.50	\$3,000.00
480-030	Medical Benefit Re-imbursement Account	\$2,500.00	\$609.61	\$28,000.00	\$27,819.72	\$29,000.00	\$13,740.00	\$29,000.00
485-010	Wages (Admin Assistant)	\$26,000.00	\$20,488.65	\$600.00	\$317.00	\$600.00	\$52.50	\$600.00
545-010	Executive Director Local Travel	\$1,200.00	\$58.25	\$1,000.00		\$1,000.00	\$0.00	\$1,000.00
	Stationery & Printing		\$1,902.32	\$1,200.00	\$1,283.37	\$1,200.00	\$641.22	\$1,200.00
450-010	Utilities (gas & elec)	\$1,700.00	\$847.79	\$1,200.00	\$7,656.82	\$500.00	\$2,141.45	\$2,500.00
460-020	Website/Web Manager	\$13,500.00	\$11,340.00	\$8,000.00	\$8,501.00	\$0.00	\$0.00	
	IRS Penalties & Settlements	\$0.00	\$7,388.32	\$0.00				
	Total National Expenses (Operations):	\$154,317.00	\$125,358.73	\$151,400.00	\$149,508.25	\$150,000.00	\$71,321.18	\$143,250.00
	<b>PAYROLL LIABILITIES</b>							
495-010	Federal Insurance Contribution Tax (FICA/SS&Medicare) / (941/944)	\$7,300.00	\$7,471.71	\$8,000.00	\$8,970.78	\$8,250.00	\$5,462.84	\$8,500.00
497-010	State Unemployment Tax (SUTA)	\$300.00	\$108.80	\$250.00	\$1,059.20	\$2,500.00	\$1,046.40	\$3,200.00
	Total Payroll Liabilities:	\$7,600.00	\$7,580.51	\$8,250.00	\$10,029.98	\$10,750.00	\$6,509.24	\$11,700.00
	<b>NATIONAL EXPENSES (TAXES/INSURANCE/LEGAL)</b>							
	Business Liability Insurance		\$590.98					
410-010	Corporation Costs	\$25.00	\$300.00	\$150.00	\$230.00	\$150.00	\$175.00	\$250.00
405-010	County Personal Property Tax	\$0.00	\$288.96	\$500.00	\$242.30	\$500.00	\$0.00	\$250.00
490-010	Liability Insurance	\$3,500.00	\$0.00	\$4,800.00	\$0.00	\$4,800.00	\$0.00	\$4,800.00
	Professional Accounting Service (Financial Review)		\$0.00	\$3,400.00	\$3,500.00	\$0.00	\$0.00	\$0.00
	Professional Accounting Fee	\$0.00	\$0.00	\$0.00	\$280.00	\$0.00	\$1,525.00	\$0.00
435-010	Federal Tax Return Preparation	\$5,100.00	\$2,002.87	\$1,500.00	\$1,485.00	\$1,500.00	\$15.57	\$1,500.00
420-010	Insurance Property	\$1,500.00	\$1,686.02	\$1,800.00	\$1,750.00	\$1,800.00	\$531.00	\$1,800.00
430-010	Legal Fees	\$1,500.00	\$2,392.00	\$1,000.00	\$528.75	\$2,000.00	\$1,952.50	\$2,000.00
400-010	Real Estate Tax	\$3,000.00	\$2,863.69	\$2,900.00	\$2,738.83	\$2,900.00	\$0.00	\$2,900.00
	Total National Expenses (Taxes/Insurance/Legal):	\$14,625.00	\$10,124.52	\$16,050.00	\$10,754.88	\$13,650.00	\$4,199.07	\$13,500.00

Coast Guard Chief Petty Officers Association  
Account Listing

Old GL Codes	Account	Budget CY2013	Actual CY2013	Budget CY2014	Actual CY2014	Budget CY2015	Actual CY2015	Budget CY2016
<b>NATIONAL EXPENSES (Start Up Expenses):</b>								
	Awards/Engravings	\$0.00	\$0.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00
	Start-up support (Chapter/Branch)							
	Chapter (Start Up)		\$462.05	\$300.00	\$141.10	\$600.00	\$18.15	\$600.00
	Chapter (Reimbursable Expenses)		\$706.28	\$900.00	\$0.00	\$1,500.00	\$500.00	\$1,500.00
	Branches (Start Up)		\$1,209.85	\$300.00	\$0.00	\$600.00	\$651.44	\$600.00
	Branches (Reimbursable Expenses)			\$900.00	\$1,358.34	\$1,500.00	\$577.93	\$1,500.00
	Total National Expenses (National Office):	\$0.00	\$2,378.18	\$2,700.00	\$1,499.44	\$4,200.00	\$1,747.52	\$4,200.00
<b>NATIONAL EXPENSES (Programs):</b>								
580-010	CPO Academy Support (Spirit of the Chief Award)	\$1,100.00	\$1,072.80	\$2,000.00	\$0.00	\$2,000.00	\$0.00	\$2,000.00
	CCCAF Program		\$42.24	\$50.00	\$44.77	\$50.00	\$161.78	\$50.00
605-010	EPOY Program Dinner	\$1,500.00	\$1,773.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00
560-010	Awards (EPOY)	\$300.00	\$0.00	\$300.00	\$568.06	\$800.00	\$440.71	\$800.00
615-010	National Election Support	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$220.45	\$0.00
610-010	25 year pin	\$0.00	\$0.00	\$1,500.00	\$34.75	\$0.00	\$0.00	\$0.00
	25 year pin: Postage	\$0.00	\$430.56	\$1,000.00	\$465.00	\$750.00	\$0.00	\$500.00
	Gold Lifetime Award							\$100.00
	Total National Expenses (Programs):	\$2,900.00	\$3,318.60	\$6,350.00	\$2,612.58	\$5,300.00	\$2,322.94	\$4,950.00
	Walter Gore Scholarship	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00
<b>PUBLICATION EXPENSES (The CHIEF Magazine):</b>								
765-040	Postage/Labels/Distribution	\$11,000.00	\$13,499.57	\$14,000.00	\$16,435.23	\$15,000.00	\$23,334.01	\$15,000.00
769-010	Printing	\$34,000.00	\$31,603.00	\$33,000.00	\$23,765.00	\$33,000.00	\$7,718.00	\$33,000.00
	Total Publications:	\$45,000.00	\$45,102.57	\$47,000.00	\$40,200.23	\$48,000.00	\$31,052.01	\$48,000.00
	Grand Total Expenses:	\$261,742.00	\$233,952.10	\$258,050.00	\$239,654.79	\$273,900.00	\$128,027.75	\$254,065.00
	End of Year Difference Between Project Budget and actual spending		\$27,789.90		\$2,501.21		\$113,922.25	
	Difference in Gross Receipts & Actual Expenses:		\$12,716.19		\$4,510.99		-\$15,346.64	
<b>Line Items Separate from Operating Funds</b>								
	Tampa Tribute			\$0.00	\$1,680.00	\$0.00	\$165.00	\$0.00
	CCCAF Interest			\$0.00	\$13.84		\$6.46	
	CCCAF Donations			\$0.00	\$2,074.00		\$802.00	
	CCCAF Program			\$5,000.00	\$5,000.00	\$8,000.00	\$8,500.00	



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
Email: [coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (Exec. Director)  
[cpoamembership@gmail.com](mailto:cpoamembership@gmail.com) (Membership)



1 August 2015

From: Executive Director  
To: National President

Subj: Annual Report

1. This report is submitted to notify you of the state of our National Office.

**NATIONAL OFFICE**

- a. A new Membership Coordinator (Julie Behre) hired in April.
- b. Concluded our 5 year lease contract for our Xerox copy machine and "bought-out" the existing machine. Contracted with local provider for service, maintenance, and supplies for a monthly fee.
- c. Continue to optimize and update the Executive Director SOP; new MC began writing SOP.

**EIN MANAGEMENT**

- a. EIN update: Of the 54 revoked EIN's, 7 await IRS determination. If they are not reinstated by 1 January, I will cancel those numbers and request new numbers.
- b. Submitted annual 990-N for all Chapters and Branches with active EIN's.

**COMPUTER SYSTEM**

- a. The ED's computer and monitor was replaced in May per the BOD's authorization. Replaced MC's computer with ED's computer. Purchased Adobe Acrobat Suite (Photoshop & InDesign) to allow in-office production of *The Chief*. All computer systems and the membership database are running as required.
- b. Weekly computer backups are conducted to ensure database integrity.

**WEBSITE**

- a. Our new website designer In10Sity has become unresponsive and unmanageable. With the approval from the Board, our webmasters CWO Michael Babischkin and BMC Phillip Null, Webmaster Emeritus QMCM Joe D'Elia and I have been working to develop a new website utilizing Wordpress that would not only cost less, but provide greater content control.

**ACCOUNTING**

- a. Continue to utilize Quickbooks Online Essentials. National Treasurer has access to ensure continued transparency and oversight.
- b. Conducted financial overview with Board during annual Spring BOD meeting.
- c. Yearly taxes submitted on time.
- d. Continue to work closely with the Budget Committee and the BOD to optimize our annual budget based upon actual expenditures.

**CCCAF**

- a. CCCAF information was published in the January edition of "The Chief" and posted on our website and e-newsletter. Received and processed 25 applications; provided to CCCAF Chair

ENCLOSURE (4)

for grading. President sent the congratulatory letter to the winners (3) and the scholarship "Big Checks" were mailed for presentation. Letters of acknowledgement were sent to all individuals who participated in this year's program.

## **COMMUNICATION**

- a. The Chief:
  - Membership Coordinator continues to attend to our transient members in our database. The April issue of The Chief resulted in 9 magazines returned, down from a high of 457 in 2011-2012.
- b. E-Newsletter:
  - Presently sending to over 7,400 contacts.
  - Still receiving above average open rate (25.0%) and click through rate (27.0%). Similar industry rates (non-profit organizations) are 24.5% and 15.4% respectively.
- c. Facebook:
  - CPOA Facebook page remains a valuable communication platform to quickly spread awareness about key issues, mobilize supporters, raise funds, and create online advocacy movements.
  - Page has over 2275 Likes (up from 1800 last year).
  - The CGEA Facebook page managed by CGEA members presently has 607 Likes (up from 388 last year). A lot of potential still remains for this platform.
- d. LinkedIn:
  - Presently has 1383 members.
- e. Twitter:
  - Presently has 326 followers.
- f. Mobile App:
  - Still available to members.

## **THE MILITARY COALITION (TMC)**

- a. Attended meeting with Veterans Affairs Secretary Robert McDonald regarding the status of VA.
- b. Posted all minutes to website and published 2015 legislative victories in the April edition of The Chief and in our e-newsletter.
- c. Posted VSO letter to majority leader Harry Reid and minority leader Mitch McConnell on advance appropriations vote (Putting Veterans Funding First Act) on website.
- d. Posted TMC letter to the Honorable Charles Hagel regarding proposed rule changes to the Military Lending Act on our website.
- e. Posted TMC letter of support for S.602 and H.R. 1141 (GI Bill Fairness Act of 2015) on our website and e-newsletter.
- f. 2015 legislative goals published in our e-newsletter.
- g. Published CPOA letter to SASC concerning MCRMC Report in our e-newsletter.
- h. Published TMC letter to House/Senate concerning not elimination impact aid for schools in our e-newsletter.
- i. Continue to work closely with Coalition to implement a new "communications committee". With over 5.5 million combined members, having a social media strategy could substantially increase our strength and influence.
- j. New TMC website launched 1 May 2015, notice published in magazine.

TMC continues to increase its reputation on the Hill. Substantial gains have been made in fostering a positive relationship with VA Secretary Robert McDonald. Representing more than five million members, the 31-member Coalition is squarely positioned to make considerable gains in the coming years as we fight for members rights and benefits.



## **MEMBERSHIP**

- a. We presently have 8376 CPOA members and 1494 CGEA members (an increase of 58 from last year). HYT and CRSP continued to impacting our membership numbers this year.
- b. Since 1 July 2014, the MC has opened 777 new memberships (396 CPOA & 381 CGEA).
- c. Since 1 July 2014, 251 of our members Crossed the Bar.
- d. The MC will mail 25-year pins to 193 eligible members this year.

## **2015 VOTE**

- e. The balloting committee completed this year's vote on 12 March with 669 votes cast via our online voting module and 412 via mail.

## **STRATEGIC PARTNERSHIPS**

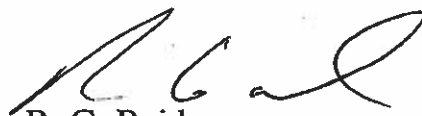
- a. USAA – Continues to provide \$10,000 as part of our annual partnership compensation. They are also sending a quarterly affinity check averaging \$1,200, donated \$1,500 to CCCAF, and sponsored our new membership recruitment contest, providing \$250 to two of our members this year.
- b. New partnership obtained with SELMANCO, a TRICARE Supplement company providing needed services to some of our members not fully covered under TRICARE.
- c. New partnership obtained with Budget and Avis, providing membership rental discounts.
- d. New partnership obtained with Government Vacation Rewards, providing membership wholesale travel discounts.

## **OTHER**

- a. Worked closely with USAA to update our CPOA Credit Card with new graphics.
- b. Commenced working on our 2016 membership directory with Publishing Concepts Inc. (PCI).

2. This has been another great year at National. Budget wise, we closed out FY 2014 in a surplus, received nearly all of our EIN's back from the IRS, continued to increase our communication outreach, and welcomed aboard 6 new Branches. I am honored to be starting my 4<sup>th</sup> year serving as your Executive Director and greatly appreciate your continuing support.

Respectfully submitted,



R. G. Reid

**MOTION TO AMEND THE CPOA OPERATIONS MANUAL**  
**National Board of Directors Motion No. 1**

**TITLE: "MEMBER IN GOOD STANDING" PRIVILEGES**

**WHEREAS:** The CPOA Operations Manual does not specifically state the privileges of a Member in Good Standing;

**WHEREAS:** A Member who is not in Good Standing should be ineligible to receive the rights/benefits accorded to a Member in Good Standing.

**THEREFORE, LET IT BE RESOLVED:**

In Section III, Organization, add a new paragraph 3. **Members. A Member in Good Standing in the CPOA is a member who is paying the established annual dues, is a Silver Lifetime Member or a Gold Lifetime Member. Any CPOA member who does not meet this criteria shall be ineligible to:**

- a. Serve the Association as a Chapter or National Officer.**
- b. Vote for Chapter or National Officers.**
- c. Vote on issues at the Chapter level or at CPOA Conventions.**
- d. Serve as a Sponsor in the CCCAF program.**
- e. Serve as Chairman or as a Member of a National Committee.**

This is to certify that on 15 April 2015, with a quorum present during a meeting of the CPOA National Board of Directors, this Motion was proposed, read, debated, and adopted by unanimous vote.

//s// K. A. Lorigan  
President

//s// A. C. Chapman  
Vice President

//s// B. Garrison  
Secretary

//s// M. T. Tahtinen  
Treasurer

//s// J. C. Crowley  
BOD Member

//s// M. A. Bumgardner  
BOD Member

//s// T. C. Anderson  
BOD Member

**THE CPOA BOARD OF DIRECTORS AND A MAJORITY OF THE CPOA CHAPTER PRESIDENTS  
HAVE VOTED TO RECOMMEND APPROVAL OF THIS MOTION AT THE 2015 CONVENTION.**

ENCLOSURE (5)

**MOTION TO AMEND THE CPOA OPERATIONS MANUAL**  
**National Board of Directors Motion No. 2**

**TITLE:           USE OF ASSOCIATION EMBLEMS**

**WHEREAS:    The CPOA & CGEA Emblems represent our Association;**

**WHEREAS:    Use of Association Emblems should be used only for approved Association activities.**

**THEREFORE, LET IT BE RESOLVED:**

**That Section X, Special Projects, paragraph 1.c.(6) be changed to reflect: (6) The CPOA/CGEA emblems are the exclusive property of the respective entities and use of these emblems require approval from the Special Projects Standing Committee Chairman. Members serving on the National Board of Directors, as a CGEA National Officer, and Chapter/Branch Officers are authorized to use the emblem(s) for Association business during their terms of office, and are not required to request prior approval.**

**This is to certify that on 15 April 2015, with a quorum present during a meeting of the CPOA National Board of Directors, this Motion was proposed, read, debated, and adopted by unanimous vote.**

**//s// K. A. Lorigan**  
**President**

**//s// A. C. Chapman**  
**Vice President**

**//s// B. Garrison**  
**Secretary**

**//s// M. T. Tahtinen**  
**Treasurer**

**//s// J. C. Crowley**  
**BOD Member**

**//s// M. A. Bumgardner**  
**BOD Member**

**//s// T. C. Anderson**  
**BOD Member**

**THE CPOA BOARD OF DIRECTORS AND A MAJORITY OF THE CPOA CHAPTER PRESIDENTS  
HAVE VOTED TO RECOMMEND APPROVAL OF THIS MOTION AT THE 2015 CONVENTION.**

*ENCLOSURE (6)*

This is a Motion to amend the National Chapter to update the United States Coast Guard Chief Petty Officers Association Operations Manual dated 9 August 2012. This is to certify that on 11 March 2015, with a quorum present at a regular scheduled meeting this Motion was proposed, read, debated, adopted and signed by majority vote.

The Alexandria Chapter would like to make a motion to:

Remove the "Pledge of Allegiance" from Section VII Meetings, (paragraph 2 Convention Information subparagraph (d.) Convention Order of Business) and paragraph 3 Other Meetings (subparagraph a) as the United States Code (4 U.S. Code § 4) provides legal direction for military members in uniform to remain silent, face the flag, and render the salute and replace "Pledge of Allegiance" with reciting the CPOA's motto "In respect for those who have gone before us, and as a guide for those who follow."



Digitally signed by DOONAN TRACEYM1016377828

**DOONAN TRACE**

ON: c=US, o=U.S. Government,

**Y M 1016377828**

cn=DOONAN TRACEYM1016377828 Date 2015.03.16 08:00:50

ou=DoD, ou=PIK, ou=CONTRACTOR,

**THE CPOA BOARD OF DIRECTORS AND A MAJORITY OF THE CPOA CHAPTER PRESIDENTS HAVE VOTED TO RECOMMEND DISAPPROVAL OF THIS MOTION AT THE 2015 CONVENTION.**

ENCLOSURE (7)

Sec 4  
Original



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009

Phone: (703) 941-0395 / Fax: (703) 941-0397  
Email: [coastguardcpon@gmail.com](mailto:coastguardcpon@gmail.com) (Exec. Director)  
[cpoamembership@gmail.com](mailto:cpoamembership@gmail.com) (Membership)



August 8, 2015

From: Special Projects Standing Convention Committee Chairman.  
To: CPOA members present at the 47 Annual Convention and the  
15<sup>th</sup> Annual CGEA Convention, August 10<sup>th</sup> 2015.

Subj: Special Projects Committee Report.

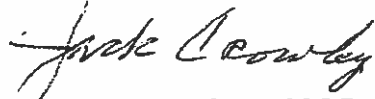
*STANDING*

Ref: CPOA Operations Manual Section II and X, 2,b

In accordance with the CPOA Operations Manual Section II and X, the following report is submitted.

1. This past year the Special Projects Committee recommended approval of several Chapter and Branches Item's to be sold. There were no conflicts with other chapters and all were sent to the BOD recommended approval.
2. In July of this year I sent out a message to all those chapters that had items for sale on our web site, this was to find out if they were up o date and still selling the same items. I did not receive 100% response back but it was better than in the past. I notified Our Web Manager, Executive Director and our National President of the Changes and deletions. E. City, Boston, Mid America and Galveston/Lone Star Chapters are no longer Selling their items.
- 3 As of this date we have 54 chapters and 48 Branches. There are only 13 Chapters and no Branches advertising item on our web site
3. I believe that many of the chapters and Branches have their own Web Sites And they are utilizing those sites to advertise and sell their Items.
4. I plan on sending out a message (and advertise in our newsletter) soon to all Chapters and Branches about the advantages of advertising on our web Site.

ENCLOSURE (8)



BMCS Jack Crowley USCG Retired  
Special Projects Committee Chairman

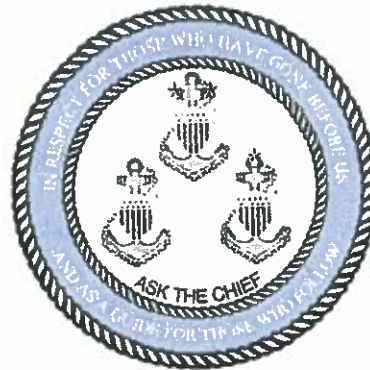
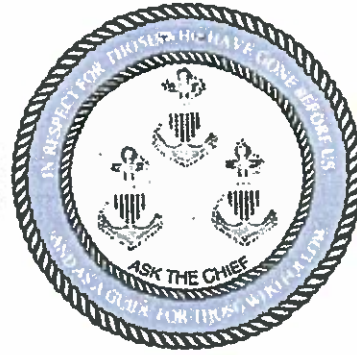
Enclosure 1. Section X Ops Manual

Enclosure 2. Example of LOGOS.

**SECTION X****Special Projects Submission**

1. The procedure for approval of a Special Project and request for advertisement in "The Chief" magazine is as follows:
  - a. Any Chapter, Branch or Unit requesting approval of a Special Project and advertising in "The Chief" magazine must submit their request to the Special Project Committee via the National Office either by e-mail or regular postage.
  - b. The request shall include:
    - (1) a cover letter;
    - (2) a photo or detailed description of the proposed project;
    - (3) a photo-ready layout and design of the advertisement.
  - c. Approval process.
    - (1) The National Office shall forward the proposed project to the Special Projects Committee.
    - (2) The Special Projects Committee will review the proposed project to ensure the request is not in conflict with any other ad currently running in the magazine.
    - (3) The Special Projects Committee will submit its recommendations to the Board of Directors.
    - (4) The Chapter, Branch or Unit will be notified upon approval / disapproval. Disapproval will be accompanied with an explanation of why it was disapproved.
    - (5) Chapters, Branches and Units are entitled to one free ad per year to run in "The Chief". The first ad will run in the edition following the approval.
    - (6) The CPOA / CGEA / CPOAA logos are the exclusive property of the respective entities and use of their logos require their approval.

[Home »](#)



[CPOA.png](#)  
[CGEA.jpg](#)

[CGEA.png](#)  
[CPOA.jpg](#)

[Ask the Chief.png](#)  
[Ask the Chief.jpg](#)  
[CPOA.tiff](#)

In order for your Chapter or Branch to Utilize these LOGO'S you must abide by our CPOA Operations Manual, Section X



See 4.  
pg. 9, 10, 11

1. On August 11, 2015, the Special Projects Committee, comprised of Chairman BMCS Jack Crowley (Ret.) and AETCM Tim Sheffler (Ret.) met to discuss Special Projects Issues.

2. The committee discussed the low percentage of Chapters and Branches advertising on the CPOA Web Site. Chairman Crowley stated that he would write up an article to be entered on our Web Site and Newsletter explaining the advantages of selling Items through the CPOA Web Site and Magazine.

3. It is recommended that the following changes be made to the Operations Manual, Section X.

- a. Paragraph 1. After the word magazine in line two add “ , web site, and social media outlets.”
- b. Paragraph 1.c (2) in line two add in after the word magazine “ , web site, and social media outlets.”
- c. Paragraph 1.c (3) in line one after the word “THE” eliminate the words Board of Directors and replace with “National President for Approval” Reasoning for this change is because sending something to the 7 member BOD for approval takes too long. Many times when a Chapter or Branch is asking for approval of a logo to be used on a T-Shirt or something else they are looking for a quick turn around. We believe that if the Chairman has already verified that it's ok then the President should be able to OK the use. Of the LOGO.
- d. Paragraph 1 c (6) on line two, after the word approval. Add in “Examples of these Logos are on the CPOA Web Site under “Resources” (LOGOS).

4. All tasks and recommendations from the 2013 and 2014 Special Projects Convention Committee reports have been completed with the exception of para. 8 from the 2013 report which reads, “...for the web master to add a link to the bottom of “Chapter Ads” on our web site to connect with Section X of the Operations Manual. This is still pending.

BMCS Jack Crowley (Ret.) Chairman

ENCLOSURE (9)



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

DATE: 11 August 2014

From: Chairman, CPO Academy Committee  
To: National Board of Directors

Subj: Annual CPO Academy Standing Committee Report

1. The Chief Petty Officers Association (CPOA) continues to provide support to the United States Coast Guard CPO Academy (CPOACAD).
2. Since ITCM Michael Allen Bumgardner did not seek reelection to the CPOA Board of Directors (BOD), he was asked to assume the role and responsibility of the CPOACAD Standing Committee Chairman by the CPOA National President during the May 2015 Board of Directors (BOD) meetings, due to the unresponsiveness of the current chairman. He agreed to serve in the role temporarily until properly relieved of duties as Region Two Advisor in August 2015, at which point he would assume the duties as the permanent chair.
3. EMC Wayne Bush serves as the CPOACAD CPOA Liaison. The Liaison and the Committee Chair discussed the status of the partnership between CPOA National and the CPOACAD in June 2015. The relationship is healthy, and the CPOA supports the CPOACAD Spirit of the Chief Award by budgeting \$2,000 each year for obtaining and preparing the award for presentation to the selected CPOACAD student.
4. The CPOACAD Liaison orders and prepares the Spirit of the Chief Award for presentation. The vendor submits the invoice to the CPOA National Office. The Executive Director (ED) verifies with the Liaison that the award was received, and then pays the invoice. This arrangement seems to work well for all concerned and allows for better invoice tracking for the National Office.
5. The CPOA Chapters continue to provide outstanding support for the Spaghetti Dinner event at the CPOACAD. Petaluma Chapter coordinates and provides Chapter attendance at the Spaghetti Dinner.
6. The CPOA Standing Committee Chairman chaired the CPOACAD Convention Committee, and is eager to engage the CPOACAD Liaison and enhance this partnership and hopefully positively affect our presence and reputation among the CPOACAD students moving forward.

Respectfully Submitted,

  
ITCM (retired) Allen Bumgardner  
Chairman

IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW

ENCLOSURE (10)



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

DATE: 11 August 2015

From: 2015 CPO Academy Convention Committee  
To: 47<sup>th</sup> Annual USCG CPOA National Convention

Subj: 2015 CPO Academy Convention Committee Report

1. The CPO Academy Convention Committee met on 11 August 2015. Committee membership was as follows: MCPO (ret) Allen Bumgardner (chair), CPO John Heinzl, CPO Jeff Steen, CWO Amy Ponce, MCPO-CGRF Eric Johnson, CPO Patrick Hodges, MCPO Dave Schacher.
2. There were no representatives from the CPO Academy Staff present.
3. Three recommendations from last year were reviewed. Two of the three recommendations were verified as having been adopted and completed (1 - re-establishing contact with the CPO Academy Liaison and updating status of Chapter support for the spaghetti dinner, and 2 - continuing open communications for ways to support the CPO Academy). It was unclear whether full implementation of one recommendation had occurred or if would occur (item 4.b - expanding Spirit of the Chief page in the magazine to publish top essay each quarter and publishing the top leadership essays from each class to the website). The Executive Director recently confirmed that the Academy Liaison would provide the essays and they would be published into the next issue of The Chief, and for posting to the website.
4. The following recommendations of the 2015 CPO Academy Convention Committee are submitted:
  - a. Reach out to the Academy Liaison (EMC Wayne Bush) and inquire as to whether they wish to <sup>STANDING</sup> enhance/update the Spirit of the Chief Award. If they do, they will submit their idea to the Committee, who will research the costs involved and present the information to the National BOD for consideration for approval and adding to next year's budget.
  - b. Work with Petaluma Chapter to better enhance/promote the CPOA at the Spaghetti Dinner. Ensure that we are properly delivering what the CPOA is, both locally at the Chapter level and nationally, and the benefit of being a member in our organization. Further, ensure that class participants that are interested voluntarily provide their name and current unit information. This information will be provided to the Regional Advisors, who can follow-up with the local/closest Chapter for that Chief and ensure there is contact between the Chapter and that member, both while at the Academy and when they return to their unit.
  - c. Have the CPO Academy Standing Committee Chair establish contact/connect with the MCPO-CG and the MCPO-CGRF to ensure the Chief Petty Officer's Association is familiar with and understands the changes coming to the CPO Academy (blended curriculum, possibility of having all E6 above the cut attend, etc). This allows for providing input and recommendations on how we can better support the Academy.
5. I move this report be adopted.

Respectfully submitted,

  
Allen Bumgardner  
Chairman

ENCLOSURE (11)



**United States Coast Guard  
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5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
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**2015 CCCAF Convention Committee Report**

1. **Captain Caliendo College Assistance Fund (CCCAF) Convention Committee met on August 11, 2015.**
2. **There is \$5,000.00 available for the 2016 CCCAF essay contest. Thank you to all for the many generous donations that make this program possible. Through your continuous support of this worth while scholarship program many students will continue to receive much needed help.**
3. **The committee agrees that additional scholarships for CCCAF should be considered for second and third place winners, given the current financial reserve fund and continuing contributions. The committee recommends awards in the amounts of \$2,500.00 for second place and \$1,000.00 for third place. The total needed to fund these scholarships for this year will be \$8,500.00.**
4. **The \$1,000.00 Walter Gore Memorial Scholarship (WSG) is funded, but not yet implemented. The WSG scholarship will be for CPOA and CGEA members, and is funded by the CPOA general fund.**
5. **The committee presents the following essay topic for 2016: This topic requires critical thinking, problem solving and research by the writer:**

**"Should the federally mandated minimum wage be raised to \$15.00 per hour? Discuss why or why not".**

  
Anthony J. Lim, SKC (ret), Chair

**Committee Members: Chief Anthony Lim (ret), CWO2 Nadine Lewis (ret), Chief Tony Reyes (ret), and Petty Officer Laurin Malone.**

*ENCLOSURE (12)*

**IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW**



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CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

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## 2015 Long Range Planning CONVENTION COMMITTEE REPORT

The Long Range Planning Convention Committee met on 11 August 2015 to discuss two issues applicable to the Chief Petty Officers Association during this session. Those issues are:

### **(1) 50<sup>TH</sup> Celebration of the Chief Petty Officers Association**

The Committee recommends that the 50<sup>th</sup> Celebration begin on or about April 7, 2018 in St. Petersburg, Florida (the place of our first convention) for our 50<sup>th</sup> Convention and conclude on or about April 7, 2019 at our 51<sup>st</sup> convention in Washington, D.C. where the Association was chartered 50 years before.

The Committee further recommends that the Annual Convention be held in April 2017 to facilitate the smooth transition of annual meetings for the 50<sup>th</sup> celebrations and beyond.

Further discussion on reducing costs of attending conventions was held with the recommendation of holding annual conventions in the same location for consecutive multiple years which would allow a reduction in the cost of rooms and associated equipment for conducting a convention.

It is further recommended that a special 50<sup>th</sup> celebration coin be created and in conjunction a contest be held among the members of the association to create a logo appropriate to the occasion.

Recommend that a formal dinner be held during the 50<sup>th</sup> Anniversary/51<sup>st</sup> Convention/ to celebrate this occasion.

Acting on these recommendations at this time will facilitate the Board of Directors in making necessary recommendation for any OPS Manual changes made necessary by these recommendations if implemented.

### **(2) A Joint Convention of United States Military Enlisted Associations**

A question put to our National President by a member of the CPOA working with the Non-Commissioned Officers Association about having a joint convention between a numbers of Enlisted Associations has generated some interest among several associations as well as




members of this Association. This question is in its infancy but potentially could provide some valuable resources in savings for conventions in the future. For example: Room cost could be drastically reduced, equipment needed for convention business would be free based on room commitments. Other amenities as well could be at reduced cost.

The Committee recommends that the National President pass this question to Association Members via whatever communications methods necessary to draw a response from the general membership (Chapter Presidents) as to interest in following up on this issue. Should there be enough interest from the membership to warrant further action on this issue, and then go forward with a plan to investigate the feasibility and implement action to make it so.

In conclusion all members currently serving on the 2015 Long Range Planning Convention Committee have agreed to serve on the Standing Long Range Planning Committee for this Association.

  
Charles Womack,

  
Carly Beer

  
Curtis Leary

  
Jack Murphy

  
Amy Ponce

  
Forrest Croom

**2015 Convention By-Laws Committee Report  
for the 47th Annual CPOA Convention**

**The National Vice-President completed all changes to the Operations Manual for years 2012 through 2014.**

**The National Vice-President developed new procedures and formats for presenting Standing and Convention Committee reports.**

**Section III, Organization, Paragraph 2.c. needs to be renumbered. This is only an administrative correction and does not change the content.**

  
Alex M. Chapman

**National Vice-President**



United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION  
5520 Hempstead Way  
Springfield, VA 22151-4009

Phone: (703) 941-0395 / Fax: (703) 941-0397  
Email: [coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (Exec. Director)  
(Membership) [cpoamembership@gmail.com](mailto:cpoamembership@gmail.com)



**August 10, 2015**

From: Chairman, Membership Committee  
To: National Board of Directors

Subj: Annual Membership Standing Committee Report

1. In August of 2014, "OUR" Association's membership stood at **8471** and the CGEA stood at **1335**. In February 2015 we had **8473** CPOA and **1426** CGEA members following a concerted effort with an Association wide Membership Drive. On the surface, it may look as though those extensive recruiting efforts provided little return on investment. However, after a more in-depth look, we actually added **213** new CPOA members and added **156** new CGEA members to the roll. While I do not have the membership numbers for 10Aug2015, I am confident that there is room for improvement in our membership efforts. Needless to say, without the recruitment of new and the retention of old members "OUR" Association will slowly starve to death!
2. Make no mistake about it, we are fighting an uphill battle with Membership. The statistics don't lie, on average, **450** CPOA members and **250** CGEA members cancel their memberships EVERY year! The GOOD NEWS is, there is plenty of opportunity for growth from within the Active Duty and Reserve workforce. In 2015 alone, the Coast Guard is projected to bring in **3250** new recruits and advance **600** new Chiefs. This is fertile ground for recruitment.
3. On the floor at convention last year, the membership committee asked for your indulgence as we took a leap of faith with three ideas (A - C) that had not yet been fully cooked. And, we pledged as a committee to tell the membership what we were going to do, then DOING what we said we would do.
  - A. New membership drive 01Oct14 – 01Jan15. The individual member that recruits the most new members (defined as never having been a CPOA/CGEA member or not currently paying dues and have been off the CPOA/CGEA roles for more than one year) that recruits or reunites into a Chapter via active duty or retired allotment wins. The prize will a \$250 gift card for the CGEA and CPOA individual member provided through the generosity of Greg Pratt and USAA.
  - B. Chapter Rebate. \$3.00 for EVERY new member (defined as never having been a CPOA/CGEA member or not currently paying dues and have been off the CPOA/CGEA roles for more than one year) that is recruited or reunited into a Chapter via active duty or retired allotment and retained for a complete calendar year to the Chapter or Branch that recruited the member.
  - C. Provide Proven Practices to every Branch/Chapter.

Additionally, every attendee at the 2014 Convention was challenged to recruit at least ONE new member into the CPOA/CGEA. If you are interested in seeing the results of that challenge, the Executive Director (ED) can easily provide those statistics. Or, what may be more informative would be to have a roll call where each member in attendance this year, publically declare their recruiting efforts since last year's convention!

IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW

ENCLOSURE (15)



4. Below are the efforts completed to date;
- A. Conducted the USAA sponsored New Member Recruitment Contest. After verifying that the allotments had started, the winners were... **AMTCM Terry Cowart (13)** from the Cape May Chapter and **SK2 Jamie Speaks (8)** from the Rock N' Roll Branch. I provided the Executive Director with the two USAA \$250.00 gift cards for proper presentation and recognition of the winners.
  - B. The statistics for the \$3.00 Chapter Rebate for every NEW member recruited and retained for a year (Convention to Convention) should be available from the National Office soon. Contact the ED for your stipend.
  - C. Provided the Proven Practices document to EVERY Chapter, Branch, individual member, and/or ANYONE else that requested it.
  - D. Provided the Membership Coordinator monthly "Projected Separations" excel documents (Aug14 thru Apr15) to be used to identify and remind retirees to continue their CPOA allotments into retirement or to consider joining the CPOA on the way out.
  - E. Responded to many phone calls, emails, and letters received from lost members desiring to reestablish their CPOA connection.
  - F. Along with the membership coordinator, corrected 1000s of member's incorrect Coast Guard email addresses.
  - G. Along with the membership coordinator, reviewed EVERY CGEA member, validating that they still belong in the CGEA and had those that had made Chief shifted to the CPOA.
  - H. Engaged in several email damage control campaigns (negative publicity, CG computer usage, ALCOAST releases, organizational philosophies etc...) to align expectations and outcomes.
  - I. Updated the Proven Practices document to be a 20 page "user friendly" electronic plug-n-play membership recruitment and retention tool. Unfortunately, the final product is locked in my HHGs, as soon as I find the digits, I will provide it to the National Office for distribution and membership usage.

54. As National Membership Chair, I pledged to continue to personally track, follow up, and make progress in increasing the number of CPOA/CGEA members, which I believe I fulfilled. And, I challenged each of you to make Membership in "OUR" Association your #1 priority too!! Did you do your part?

68. I know, we are all "busy", but it is a personal choice to be involved with the CPOA/CGEA and we CANNOT be successful without you! As always, if you have questions, concerns, or comments, do not hesitate to let me know.

One Member at a Time, Think Globally Recruit Locally,

CMC Kevin Isherwood, USCG(Ret)  
Chairman



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

August 11, 2014

Subj: 2015 Membership Convention Committee Report

1. The Membership Committee met on 11 August 2015.
2. The membership committee appointed to report on the membership of the Association discussed ways to increase membership in the CPOA and CGEA and came up with these recommendations.
  - a. Continue to seek out strategic partnership agreements to increase membership benefits.
  - b. As noted in the Membership Chairman's report, approximately 450 CPOA and 250 CGEA members cancel their membership every year. Recommend that the National Office reach out to these members shortly after canceling via formal letter or e-mail with "we miss you" correspondence, outlining what we do as an Association, what we continue to do for them, and how they can quickly re-connect.
  - c. Continue working with USAA on annual membership drive contest.
  - d. Develop a "what's in it for me" video for wide dissemination.
  - e. We continue to miss out on the opportunity to reach out to Chapter Presidents prior to CCTI's. Recommend Regional Advisors work closely with the Membership Chair to disseminate his "Proven Practices" document and verbally reach out to the Chapter President.
  - f. In corporation with our PR coordinator, develop a "come to convention" video to be disseminated 5-6 months prior to our next convention in Las Vegas.
  - g. There seems to be limited communication and guidance to some Branch Officers on new member recruiting best practices. Recommend that Regional advisors reach out **quarterly** to each President.

3. I move this report be adopted.

*Carly Beer*  
Respectfully Submitted,

YN2 Carly Beer, Convention Committee Chairman

Committee Members: PO Timika Kuykindall, PO Nicholas Krupa, PO Heather Paxson, CWO2 (Ret) Randy Reid, PO Aurelia Isham, PO Leslie McCready, PO Andrea Parker, PO Bryant Petty.

ENCLOSURE (16)

Subj: 2015 CGEA Review CONVENTION COMMITTEE REPORT

1. The Coast Guard Enlisted Association Review Convention Committee met on 11 August 2015 to discuss matters pertaining to the CGEA.

2. The CGEA ~~Convention~~<sup>CONVENTION</sup> Committee met to devise a plan for future CGEA specific membership promotion. We will be creating a fundraiser, event flyer, and membership drive idea page on the CPOA/CGEA website on the improved website later this year, but for now we will be sharing accessible documents on our Facebook page. This will assist new Branches and inspire current Branches with fresh ideas.

3. National CGEA Officers will contact the branches on a quarterly basis (or as much as needed) for updates on current issues. We will also be working much closer with the RA's to have a better line of communication with both Branches and National Officers.

4. We will be creating a more detailed RA liason guide for our Branches to better understand "How to utilize our RA's?".

5. Develop a plan to have a no-cost "CGEA Roadshow- Whats in it for me?" via facetime, skype, in person meet and greets, and through designated volunteers. Note: A designated volunteer is someone the CGEA National Office<sup>ES</sup> has approved to be a representative for the CGEA Roadshow. We will be creating a basic powerpoint explaining the CGEA of today that can be shown across all Branches and Chapters. (This will not go out into dissemination without CPOA Nationals approval.)

6. Proposed a draft as an enclosure to the CGEA Operations manual to better define the roles and responsibilities of the CPOA Chapter liason and CGEA Branch liasons. The enclosure will also have a "Roadmap for success" on how to best take care of your Branches and how to have a successful transfer.

7. Designated YN2 Casey Lawrence as a social media chair.

8. I move this report be adopted.

Respectfully Submitted,

YN2 Carly Beer, USCG  
Chairman

Committee Members:

Nicholas Krupa, YN2 (CGEA), Randy Reid (ED-CWO2 RET), Bryant Petty, MK3 (CGEA), Andrea Parker, YN3, (CGEA), Leslie McCready, YN2, (CGEA), Aurelia Ishann, (CGEA), Heather Paxson, (CGEA), Tamika Kuykindall, SK2 (CGEA)

ENCLOSURE (17)

Subj: 2015 CGEA Review CONVENTION COMMITTEE REPORT

1. The Coast Guard Enlisted Association Review Convention Committee met on 11 August 2015 to discuss matter pertaining to the CGEA.
2. The CGEA Convention Committee met to devise a plan for Future CGEA specific membership promotion. We will be creating a fundraiser, event flyers, and membership drive idea page on the CPOA/CGEA website on the improved website later this year, but for now we will be sharing accessible documents on our Facebook page. This will assist new Branches and inspire current Branches with fresh ideas.
3. National CGEA Officers will contact the branches on a quarterly basis (or as much as needed) for updates on current issues. We will also be working much closer with the RA's to have a better line of communication with both Branches and National Officers.
4. We will be creating a more detailed RA liaison guide for our Branches to better understand "How to utilize our RA's?".
5. Develop a plan to have a no-cost "CGEA Road show – What's in for me?" via face time, skype, in person meet and greets, and through designated volunteers. Note: A designated volunteer is someone the CGEA National Officers has approved to be a representative for the CGEA Road Show. We will be creating a basic power point explaining the CGEA of today that can be shown across all Branches and Chapters. (This will not go out into dissemination without CPOA Nationals approval.)
6. Propose a draft as an enclosure to the CGEA Operations Manual to better define the roles and responsibilities of the CPOA Chapter liaisons. The enclosure will also have a "Roadmap for success" on how to best take care of your Branches and how to have a successful transfer.
7. Designated YN2 Casey Lawrence as a social media chairperson.
8. I move that this report be adopted.

Respectfully Submitted,

YN2 Carly Beer, USCG  
Chairman

Committee Members:

YN2 Nicholas Krupa, Rand Reid, MK3 Bryant Petty, YN3 Andrea Parker, YN2 Leslie McCready, Aurelia Ishann, Heather Paxson, Sk2 Tamika Kuykindall



United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION  
5520 Hempstead Way  
Springfield, VA 22151-4009



Phone: (703) 941-0395 / Fax: (703) 941-0397  
Email: [coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (Exec. Director)  
[cpoamembership@gmail.com](mailto:cpoamembership@gmail.com) (Membership)

## BUDGET CONVENTION COMMITTEE REPORT

1. The committee met at this Convention to review the published 2016 CPOA Budget, which was printed in the July 2015 edition of "THE CHIEF" to allow members to review and ask questions prior to Convention.
2. CCCAF contributions from allotments in the amount of \$2,708.25 were transferred in July 2015 for the period of 7/1/14 thru 6/30/15.
3. The Budget Committee Chariman received a budget ratification request to the 2015 budget to increase the Office Machine Repair (Old GL - 510-010) budget line by \$6,100. This ratification covers the buyout option on the office copy machine. Purchase of the copier will reduce future year budgets by approx. \$5,500 annually. The new service agreement will cost approx. \$1,500 annually. The Board of Directors approved this request in July 2015. The Budget Committee recommends convention approval of this ratification.
4. The Budget Committee Chairman received a budget ratification request to the 2015 budget for \$3,000 from the Website Managers. This ratification will pay for the change in service providers from In10sity to Site5. The Board of Directors approved this request in June 2015 at the recommendation of the Association's Web Managers to reduce cost and improve Website Management. The Budget Committee recommends convention approval of this ratification.
5. The Board of Directors submitted a budget ratification request to the 2015 budget for up to \$5,000 to cover extraordinary expenses of the 2015 convention. The Board of Directors request a new line item of \$5,000 be created to supplement future convention budgets to cover Convention expenses. The Budget Committee recommends convention approval of this ratification and new budget line.
6. Following last year's Convention, a new budget line was created to provide \$500 each to the awardees of the Presidents Outstanding Chapter/Branch Award to be used as they see fit. The Budget Committee recommends that the criteria for receiving the \$500 be changed to allow these funds to be used only for participation at the next year's convention.
7. I move this report be adopted.

CWO2(F&S) Mark T. Tahtinen  
Budget Convention Chairman/National Treasurer

IN RESPECT FOR THOSE WHO HAVE GONE BEFORE US...AS A GUIDE FOR THOSE WHO FOLLOW

ENCLOSURE(18)

Coast Guard Chief Petty Officers Association  
Account Listing

Old GL Codes	Account	Budget CY2013	Actual CY2013	Budget CY2014	Actual CY2014	Budget CY2015	Actual CY2015 YTD 6/30/15	Budget CY2016	Actual CY2016
<b>INCOME</b>									
300-010	Membership Dues	\$70,000.00	\$73,540.24	\$73,000.00	\$78,075.99	\$75,000.00	\$34,323.85	\$77,000.00	
	Active-Duty Allowments	\$40,000.00	\$47,128.40	\$43,000.00	\$47,100.31	\$45,800.00	\$20,341.85	\$45,800.00	
	Cash/Checks	\$4,500.00	\$5,983.00	\$5,000.00	\$5,000.00	\$6,000.00	\$2,718.80	\$6,000.00	
	Credit Card Payments	\$90,000.00	\$94,731.00	\$95,000.00	\$93,575.50	\$95,000.00	\$38,725.00	\$97,000.00	
	Retiree Allowments	\$3,000.00	\$4,750.00	\$4,500.00	\$2,087.00	\$3,000.00	\$0.00	\$3,000.00	
	Silver Lifetime Purchases (Held at TD Bank)	\$0.00	\$714.72	\$300.00	\$3,200.00	\$350.00	\$102.02	\$350.00	
	Sales of Product Income - Cafe Press	\$1,500.00	\$3,600.00	\$2,400.00	\$3,200.00	\$2,000.00	\$1,900.00	\$2,000.00	
	The CHIEF Advertising Income		\$13,189.97	\$14,600.00	\$14,402.75	\$15,000.00	\$11,917.27	\$15,000.00	
	USA - Sponsorship (Affinity Program)								
	Interest Earned								
	Companion Checking Interest	\$0.00	\$373.21	\$0.00	\$0.00	\$0.00	\$1,517.80	\$0.00	
	High Yield Savings TD Bank Interest	\$0.00	\$371.91	\$468.00	\$575.82	\$0.00	\$95.80	\$0.00	
	Reserve Fund BoA Interest	\$0.00	\$102.15	\$132.00	\$52.49	\$0.00	\$23.28	\$0.00	
	Silver Lifetime TD Bank CD Interest (deleted)	\$0.00	\$1,784.11	\$3,600.00	\$115.92	\$0.00	\$26.86	\$0.00	
	Silver Lifetime TD Bank Interest	\$0.00	\$173.67	\$156.00		\$0.00		\$0.00	
	Navy Fed CD #1 Matures 3/17/2018	\$0.00	\$217.91	\$0.00	\$0.00	\$0.00		\$0.00	
	Other Ordinary Income	\$0.00		\$0.00	\$0.00	\$0.00		\$0.00	
	BOA Checking Account	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	
	BOA Interest Maximizer Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	
	Pentagon Federal CD's when converted into High Yield Savings	\$208,000.00	\$246,688.29	\$242,166.00	\$244,166.78	\$241,950.00	\$111,692.31	\$245,950.00	
	<b>Total INCOME:</b>								\$0.00
715-010	<b>CONVENTION EXPENSES</b>								
	Awards	\$0.00	\$2,110.65	\$1,500.00	\$1,056.15	\$2,000.00	\$1,479.89	\$1,000.00	
700-010	President's Outstanding Chapter/Branch Incentive	\$1,800.00		\$1,500.00		\$1,000.00		\$1,000.00	
	Convention Committee Expenses (Mailings Materials)		\$8,022.79	\$8,500.00		\$1,500.00		\$1,000.00	
705-010	CPOA National BOD Expenses (Includes tvl, per diem, hotel, misc)	\$15,000.00	\$1,505.42			\$16,000.00	\$1,655.38	\$8,750.00	
	President								
	Vice-President								
	Secretary		\$1,411.90		\$1,486.50				
	Treasurer		\$1,288.19		\$1,455.80				
	Regional Advisor: Region 1		\$1,782.05		\$1,496.50				
	Regional Advisor: Region 2		\$1,483.45		\$1,638.00				
	Regional Advisor: Region 3		\$1,530.78		\$1,058.70				
707-010	CGEA National Officer Expenses (Includes tvl, per diem, hotel, misc.	\$4,500.00	\$4,674.60	\$4,500.00	\$1,194.54	\$7,000.00		\$5,000.00	
	President		\$2,145.21		\$918.84				
	Vice-President		\$1,340.21		\$0.00				
	Secretary		\$1,189.18		\$1,589.00				
710-010	Treasurer	\$2,000.00	\$1,389.89	\$1,300.00	\$1,076.28	\$1,500.00	\$808.20	\$1,500.00	
	Executive Director		\$30,895.42	\$17,300.00	\$16,082.15	\$31,000.00	\$3,740.47	\$18,250.00	
	<b>Total Convention Expenses:</b>	\$23,300.00							\$0.00
550-010	<b>NATIONAL EXPENSES: CPOA BOD TRAVEL</b>								
	National Officers	\$12,000.00	\$3,412.51	\$7,000.00	\$1,585.36	\$7,000.00	\$480.28	\$6,500.00	
	President				\$0.00		\$1,005.86		
	Vice-President		\$1,163.81		\$1,154.42		\$1,089.46		
	Secretary		\$801.04		\$1,183.79		\$929.53		
	Treasurer		\$917.01		\$1,154.42		\$627.21		
	Regional Advisor: Region 1		\$1,535.46		\$852.80		\$916.87		
	Regional Advisor: Region 2								
	Regional Advisor: Region 3								
550-030	<b>NATIONAL EXPENSES: CGEA TRAVEL</b>	\$2,000.00	\$587.74	\$2,000.00	\$969.60	\$4,000.00	\$1,336.92	\$3,715.00	
	President		\$776.00		\$542.08		\$750.11		
	Vice-President				\$0.00				
	Secretary								

Coast Guard Chief Petty Officers Association  
Account Listing

Old GL Codes	Account	Budget CY 2013	Actual CY 2013	Budget CY 2014	Actual CY 2014	Budget CY 2015	Actual CY 2015	Budget CY 2016	Actual CY 2016	Actual CY 2018
	Treasurer				\$972.50					
	Total CGEA/CPOA Travel:	\$14,000.00	\$9,183.57	\$8,000.00	\$8,967.28	\$11,000.00	\$7,135.32	\$10,215.00		\$0.00
	<b>NATIONAL EXPENSES (OPERATIONS)</b>									
445-010	Building Repair & Maintenance	\$2,000.00	\$3,813.37	\$2,000.00	\$4,881.05	\$2,000.00	\$2,009.59	\$2,000.00		
535-010	Computer Equip & Software	\$3,000.00	\$408.70	\$2,000.00	\$39.89	\$2,000.00	\$4,255.77	\$1,500.00		
440-010	Condo Association Fees	\$1,500.00	\$2,738.78	\$3,000.00	\$487.96	\$3,000.00	\$506.42	\$3,000.00		
515-010	Credit Card Processing Fees	\$0.00	\$289.73	\$300.00	\$876.41	\$300.00	\$563.81	\$500.00		
505-010	Membership Processing Expense	\$2,000.00	\$876.30	\$1,000.00	\$405.27	\$1,000.00	\$41.87	\$750.00		
	Membership: Electronic Communications (Constant Contact)		\$1,186.00	\$1,500.00	\$1,268.50	\$1,500.00	\$696.27	\$1,000.00		
585-010	Memorial Fund	\$1,000.00	\$500.00	\$500.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00		
585-020	National CPOA BOD Discretionary	\$500.00		\$500.00	\$300.00	\$1,000.00	\$0.00	\$500.00		
530-010	National CGEA Officers Discretionary	\$1,500.00		\$500.00	\$50.00	\$1,000.00	\$0.00	\$500.00		
510-010	Office Equipment & Furnishings	\$7,000.00	\$6,848.74	\$7,000.00	\$8,525.18	\$7,000.00	\$2,910.68	\$1,500.00		
525-010	Office Machine Repair (includes maintenance contracts)	\$4,000.00	\$1,236.40	\$1,500.00	\$1,338.34	\$1,500.00	\$1,873.51	\$1,500.00		
	Office Supplies		\$383.52	\$1,500.00	\$805.40	\$1,500.00	\$239.70	\$1,000.00		
	Online Accounting Service (QuickBooks & Payroll)		\$1,137.00	\$0.00	\$378.00	\$0.00	\$278.00	\$0.00		
	Payroll (initial) -		\$1,640.08	\$1,800.00	\$1,754.07	\$1,800.00	\$986.12	\$1,800.00		
460-010	Phone and Internet Bundle	\$2,500.00	\$1,640.08	\$1,800.00	\$8,778.83	\$12,000.00	\$-3,282.00	\$8,800.00		
500-010	Postage (includes equipment rental)	\$11,000.00	\$8,720.84	\$10,000.00	\$242.88	\$200.00	\$55.00	\$200.00		
540-010	Publications (Off pub, Roberts Rules, etc)	\$200.00	\$105.00	\$200.00						
	Employee Pay & Benefits									
480-010	Salary (Executive Director)	\$68,712.00	\$52,758.55	\$71,000.00	\$75,599.60	\$73,000.00	\$40,232.45	\$75,000.00		
480-020	Employee Retirement Account	\$4,205.00	\$808.81	\$4,300.00	\$588.76	\$4,400.00	\$2,539.77	\$4,400.00		
480-030	Medical Benefit Re-Imbursement Account	\$2,500.00	\$20,488.65	\$28,000.00	\$27,819.72	\$3,000.00	\$9,343.20	\$3,000.00		
485-010	Wages (Admin Assistant)	\$26,000.00	\$58.25	\$600.00	\$317.00	\$600.00	\$52.50	\$600.00		
545-010	Executive Director Local Travel	\$1,200.00	\$1,802.32	\$1,000.00	\$1,283.37	\$1,000.00	\$0.00	\$1,000.00		
450-010	Stationery & Printing	\$1,700.00	\$847.79	\$1,200.00	\$7,656.82	\$1,200.00	\$641.22	\$1,200.00		
450-020	Utilities (gas & elec)	\$13,500.00	\$11,340.00	\$8,000.00	\$7,656.82	\$500.00	\$2,141.45	\$2,500.00		
	Website/Web Manager	\$0.00	\$7,398.32	\$0.00	\$8,501.00	\$0.00	\$0.00			
	IRS Penalties & Settlements									
	Total National Expenses (Operations):	\$154,317.00	\$125,356.73	\$151,400.00	\$149,068.25	\$150,000.00	\$68,808.81	\$143,250.00		\$0.00
	<b>PAYROLL LIABILITIES</b>									
495-010	Federal Insurance Contribution Tax (FICA/SSA/Medicare) / (941/964)	\$7,300.00	\$7,471.71	\$8,000.00	\$8,970.78	\$8,250.00	\$5,482.84	\$8,500.00		
497-010	State Unemployment Tax (SUTA)	\$300.00	\$108.80	\$250.00	\$1,059.20	\$2,500.00	\$1,046.40	\$3,200.00		
	Total Payroll Liabilities:	\$7,600.00	\$7,580.51	\$8,250.00	\$10,029.98	\$10,750.00	\$6,529.24	\$11,700.00		\$0.00
	<b>NATIONAL EXPENSES (TAXES/INSURANCE/LEGAL)</b>									
	Business Liability Insurance		\$590.98							
410-010	Corporation Costs	\$25.00	\$300.00	\$150.00	\$230.00	\$150.00	\$175.00	\$250.00		
405-010	County Personal Property Tax	\$0.00	\$288.86	\$500.00	\$242.30	\$500.00	\$0.00	\$250.00		
490-010	Liability Insurance	\$3,500.00	\$0.00	\$4,800.00	\$0.00	\$4,800.00	\$0.00	\$4,800.00		
	Professional Accounting Service (Financial Review)	\$0.00	\$0.00	\$0.00	\$3,500.00	\$0.00	\$0.00	\$0.00		
	Professional Accounting Fee	\$0.00	\$0.00	\$0.00	\$280.00	\$0.00	\$1,525.00	\$0.00		
435-010	Federal Tax Return Preparation	\$5,100.00	\$2,002.87	\$1,500.00	\$1,485.00	\$1,500.00	\$15.57	\$1,500.00		
420-010	Insurance Property	\$1,500.00	\$1,698.02	\$1,800.00	\$1,750.00	\$1,800.00	\$531.00	\$1,800.00		
430-010	Legal Fees	\$1,500.00	\$2,392.00	\$1,000.00	\$528.75	\$2,000.00	\$1,852.50	\$2,000.00		
400-010	Real Estate Tax	\$3,000.00	\$2,863.69	\$2,800.00	\$2,738.83	\$2,900.00	\$0.00	\$2,900.00		
	Total National Expenses (Taxes/Insurance/Legal):	\$14,625.00	\$10,124.52	\$16,050.00	\$10,754.88	\$13,650.00	\$4,189.07	\$13,500.00		\$0.00
	<b>NATIONAL EXPENSES (Start Up Expenses):</b>									
	Awards/Engraving	\$0.00	\$0.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00		
	Start-up support (Chapter/Branch)									
	Chapter (Start Up)		\$462.05	\$300.00	\$141.10	\$600.00	\$18.15	\$600.00		
	Chapter (Reimbursable Expenses)		\$706.28	\$800.00	\$0.00	\$1,500.00	\$500.00	\$1,500.00		
	Branches (Start Up)		\$1,208.85	\$0.00	\$0.00	\$600.00	\$651.44	\$600.00		
	Branches (Reimbursable Expenses)			\$800.00	\$1,358.34	\$1,500.00	\$577.93	\$1,500.00		

## Account Listing

Old GL Codes	Account	Budget CY2013	Actual CY 2013	Budget CY2014	Actual CY 2014	Budget CY2015	Actual CY 2015	Budget CY2016	Actual CY 2016
	Total National Expenses (National Office):	\$0.00	\$2,378.18	\$2,700.00	\$1,489.44	\$4,200.00	\$1,747.52	\$4,200.00	\$0.00
	NATIONAL EXPENSES (Programs):								
580010	CPO Academy Support (Spirit of the Chief Award)	\$1,100.00	\$1,072.80	\$2,000.00	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
605010	CCCAF Program		\$42.24	\$50.00	\$44.77	\$50.00	\$161.78	\$50.00	\$50.00
605010	EPOY Program Dinner	\$1,500.00	\$1,773.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00
580010	Awards (EPOY)	\$300.00	\$0.00	\$300.00	\$568.06	\$800.00	\$440.71	\$800.00	\$800.00
615010	National Election Support	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$220.45	\$0.00	\$0.00
610010	25 year pin	\$0.00	\$0.00	\$1,500.00	\$34.75	\$0.00	\$0.00	\$0.00	\$0.00
	25 year pin: Postage	\$0.00	\$430.56	\$1,000.00	\$465.00	\$750.00	\$0.00	\$500.00	\$500.00
	Gold Lifetime Award							\$100.00	
	Total National Expenses (Programs):	\$2,900.00	\$3,318.60	\$6,350.00	\$2,612.58	\$5,300.00	\$2,322.94	\$4,950.00	\$0.00
	Walter Gore Scholarship	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	
	PUBLICATION EXPENSES (The CHIEF Magazine):								
765040	Postage/airfare/Distribution	\$11,000.00	\$13,498.57	\$14,000.00	\$16,435.23	\$15,000.00	\$23,334.01	\$15,000.00	
769010	Printing	\$34,000.00	\$31,603.00	\$33,000.00	\$23,785.00	\$33,000.00	\$7,718.00	\$33,000.00	
	Total Publications:	\$45,000.00	\$45,102.57	\$47,000.00	\$40,200.23	\$48,000.00	\$31,052.01	\$48,000.00	\$0.00
	Grand Total Expenses:	\$281,742.00	\$233,952.10	\$258,050.00	\$238,654.79	\$273,900.00	\$123,615.38	\$254,065.00	\$0.00
	End of Year Difference Between Project Budget and actual spending		\$27,789.90		\$2,501.21		\$118,334.62		\$254,065.00
	Difference in Gross Receipts & Actual Expenses:		\$12,718.19		\$4,510.89		-\$11,923.07		\$0.00
Line Items Separate from Operating Funds									
	Tampa Tribune			\$0.00	\$1,680.00	\$0.00		\$0.00	
	CCCAF Interest			\$0.00	\$13.84		\$6.48		
	CCCAF Donations			\$0.00	\$2,074.00		\$802.00		
	CCCAF Program			\$5,000.00	\$5,000.00	\$8,000.00	\$8,500.00		





**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

13 August 2015

From: 2015 CPOA Convention Convention Committee

To: 47<sup>th</sup> Annual USCG CPOA National Convention

Subj: 2015 CPOA CONVENTION CONVENTION COMMITTEE REPORT

1. The Convention Convention Committee met on 12 August 2015.
2. The Committee commends the Standing Convention Committee Chairman and the local Chapters for their efforts in organizing the 2015 Convention.
3. This Committee recommends the following:
  - a. Community service remains a vital part of our organization and should be continued at future conventions. Suggested to coordinate with local AFB public affairs for 2016 convention project. (no cost)
  - b. While community service is vital to our organization, the committee further believes that mutual association is an equal part. This committee recommends research be conducted to schedule a social event during the 2016 convention, appoint an event coordinator and work with the Executive Director (ED) to publish information via the association newsletter. (no cost)
  - c. Recommend the presentation of a post convention slideshow to showcase the events of convention and hope to gather greater interest in convention. (cost unknown)
  - d. Recommend continued and expanded social media efforts. (no cost)
  - e. Recommend an Ad Hoc Committee be formed to begin planning the 50th Annual Convention.
4. The idea of holding joint conventions with other enlisted associations was discussed. While this is an idea in its infancy, the committee recommends it be pursued to determine if it is beneficial to our association. (no cost)
5. The idea of holding our annual convention in the same location for multiple years was discussed. The idea of multiple year contracts with the same national hotel chain was also discussed. The idea here is to determine if doing so may provide a better rate and amenities. This too is an idea in its infancy, but this committee believes it is worth the research. (no cost)
6. I move this report be adopted.

Respectfully Submitted,

QMC (Ret) William Segelken  
Committee Chairman

Committee Members: MC Al Bumgardner, Chief Kim Lorigan, PO Carly Beer, PO Tomika Kurkendahl, Chief Charlie Womack, MC Dave Isherwood

ENCLOSURE (19)



**United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION**

5520 Hempstead Way  
Springfield, VA 22151-4009  
Phone: (703) 941-0395 / Fax: (703) 941-0397  
[coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (National Office)

13 August 2015

From: 2015 CPOA Convention Convention Committee  
To: 47<sup>th</sup> Annual USCG CPOA National Convention

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  - e. Recommend an Ad Hoc Committee be formed to being planning the 50th Annual Convention.
4. The idea of holding joint convention with other enlisted association was discussed. While this is an idea in its infancy, the committee recommends it be pursued to determine if it is beneficial to our association. (No cost)
5. The idea of holding our annual convention in the same location for multiple years was discussed. The idea of multiple year contracts with the same hotel chain was also discussed. The idea here is to determine if doing so may provide a better rate and amenities. This is an idea in its infancy, but this committee believes it is worth the research. (No cost)

6. I move this report be adopted.

Respectfully Submitted

QMC (Ret.) William Segelken

Committee Members: MCPO Al Bumgardner, CPO Kim Lorigan, SCPO Charlie Womack, MCPO Dave Isherwood, PO Carly Beer, PO Tomika Kurkendahl

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