

## WEDNESDAY 3 APRIL 2019

**Opening Ceremonies:** At 0900, 3 April 2019, Master of Ceremonies MCPO Mark Allen welcomed the convention attendees and guests.

**Parading of Colors and National Anthem:** U.S. Coast Guard Color Guard consisting of SN Thomas Edwards, SN Gillian Lowe, SN Camron King and SN Robert Domino paraded the Colors followed by National Anthem.

**Pledge of Allegiance:** CPOA National President BMCS Jon Ostrowski led all in attendance in the Pledge of Allegiance.

**Invocation:** CGEA National President YN1 Casey Lawrence gave the invocation.

**Preambles:** CPOA National President BMCS Jon Ostrowski read the CPOA Preamble.

CGEA National President YN1 Casey Lawrence read the CGEA Preamble.

**Memorial Service:** CGEA National President YN1 Casey Lawrence conducted the Memorial Service for those who had "Crossed the Bar" during the past year. CWO2 Mark Tahtinen played Taps.

**Introductions:** MCPO Mark Allen introduced Past National President:

YNCM Frank Smith  
RMCM Glen Lambert  
EMCM Lou Maher  
YNC Kim Lorigan

MCPO Mark Allen introduce the CPOA National Board of Directors and the CGEA National Officers

CWO2 Mark Tahtinen introduced the CPOA Gold Lifetime Members in attendance:

#8 Glen Lambert  
#13 ETCM Tim Lackey  
#17 MKCM Dave Isherwood  
#28 ETCM Kevin Isherwood  
#30 YNC Jack Murphy  
#31 YNCS Bruce Garrison  
#33 MCPOCG Rick Trent  
#34 QMC Bill Segelkin

All Gold Lifetime Members were brought forward and presented with a Gold Lifetime Members Blazer from the Association.

RMCM Glen Lambert introduced YNC Kim Lorigan as the newest Gold Lifetime Member #35.

YNC Kim Lorigan was presented with a Gold Lifetime Membership (GLM) Certificate, membership card, coin, pin and Blazer.

MCPO Mark Allen asked that all members with 25 years or more in the Association to please rise and be recognized. MCPO Allen asked all those with 30 years or more to remain standing, with 35 years or more to remain standing, 40 years or more to remain standing, 45 years of more to remain standing and those with 50 years to remain standing.

There were 4 members in attendance with 50 years in the Association.

YNCM Frank Smith  
RMCM Glen Lambert  
FTCM Lonnie Jones  
YNC Jack Murphy

**Guest Speaker:** CPOA National President BMCS Jon Ostrowski introduced Deputy MCPOCG Rob Bushy as our Guest Speaker.

Deputy MCPOCG Rob Bushy gave an informative speech and thank the CPOA and CGEA for their work during the past year.

At 1005 National CPOA President BMCS Jon Ostrowski declared the 51<sup>st</sup> National CPOA and the 20<sup>th</sup> National CGEA Conventions open.

*1010 Recessed*  
*1230 Reconvened*

**Roll Call of National Board of Directors:**

National President	BMCS Jon Ostrowski	Present
National Vice President	BMCS Charlie Womack	Present
National Secretary	YNCS Bruce Garrison	Present
National Treasurer	CWO2 Mark Tahtinen	Present
Region 1 Advisor	MKCM Dave Isherwood	Present
Region 2 Advisor	HSCM Tyrone Anderson	Excused Absence
Region 3 Advisor	CWO2 Amy Ponce	Present

**Roll Call of Chapters:**

The following Chapters were present at the time of roll call:

Cape May P +2, Crystal Coast 1, Derby City Sluggers 1, Elizabeth City P +1, Golden Gate P T +3, Hampton Roads P, Hawaiian Islands P +1, Juneau P, Kodiak T, Lone Star 1,

Long Island 1, Lost Coast P, Low Country 1, Marianas Guam 1, Members at Large 2, Miami 1, Mobile P +2, New Orleans VP, Northeast Florida P +2, Northern New England P, Oklahoma City P, River City Blues S T +1, SE Connecticut P S, Seattle 3, SOO 1, Southernmost 1, Sun Coast P VP S +1, Washington DC 2, Yorktown P +1.

**NOTE:**

P = President

VP = Vice President

S = Secretary

T = Treasurer

Number = All other members of Chapter Present

The following Chapters were not present at the time of roll call:

Alexandria, Baltimore, Boston, Cape Cod, Eastern Great Lakes, Gold Country, Golden Triangle, Grand Haven, Greater Alaska, Greater Detroit, Green Bay, Jersey Shore, Ketchikan, Kleckner, Los Angeles/Long Beach, Lower Columbia River, Martinsburg West Virginia, Mid America, New Haven, North Bend, North Coast, Pan Handle, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, South Texas, St Louis, Traverse City, USCG Desert CPO Bahrain, Western Lake Michigan.

There were a total of 51 members present at time of roll call. A quorum of 26 was established.

Motion by National Vice President BMCS Charlie Womack to only call Chapters present during the initial roll call. Motion seconded by YNC Kim Lorigan. Motion Carried.

Motion by YNC Kim Lorigan to accept the minutes of 23 August 2018 as printed. Motion seconded by CWO George Hamilton. Motion Carried. **(Encl: 1)**

National Treasurer CWO2 Mark Tahtinen presented the Annual Treasurer's Report. **(Encl: 2).**

Executive Director Randy Reid presented his Annual Report. **(Encl: 3)**

National President BMCS Jon Ostrowski presented his 2019 State of the CPOA Report. **(Encl: 4).**

National President BMCS Jon Ostrowski asked everyone to sing up for a convention committee.

*1326 Recessed*

*1346 Reconvened*

51<sup>st</sup> National CPOA Convention  
Herndon, VA

3-5 April 2019

National President BMCS Jon Ostrowski assigned Chairperson for the convention committees.

*1410 recessed until 0800, 4 April 2019*

## THURSDAY 4 APRIL 2019

*0800 Reconvened*

### **Roll Call of National Board of Directors:**

National President	BMCS Jon Ostrowski	Present
National Vice President	BMCS Charlie Womack	Present
National Secretary	YNCS Bruce Garrison	Present
National Treasurer	CWO2 Mark Tahtinen	Present
Region 1 Advisor	MKCM Dave Isherwood	Present
Region 2 Advisor	HSCM Tyrone Anderson	Excused Absence
Region 3 Advisor	CWO2 Amy Ponce	Present

### **Roll Call of Chapters:**

Cape May P +2, Crystal Coast 1, Derby City Sluggers 1, Elizabeth City P +2, Golden Gate P T, Hampton Roads P, Hawaiian Islands P +1, Kodiak T, Long Island 1, Lost Coast P, Low Country 1, Members at Large 2, Miami 1, Mobile P +2, New Orleans VP, Northeast Florida P +2, Northern New England P, Oklahoma City P, River City Blues S T +1, SE Connecticut P S, Seattle 2, SOO 1, Southernmost 1, Sun Coast P VP S +1, Washington DC 2, Yorktown P +1.

The following Chapters were not present at time of roll call:

Alexandria, Baltimore, Boston, Cape Cod, Eastern Great Lakes, Gold Country, Golden Triangle, Grand Haven, Greater Alaska, Greater Detroit, Green Bay, Juneau, Ketchikan, Kleckner, Lone Star, Los Angeles/Long Beach, Lower Columbia River, Marianas Guam, Martinsburg West Virginia, Mid America, New Haven, North Bend, North Coast, Pan Handle, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, South Texas, Traverse City, USCG Desert CPO Bahrain, Western Lake Michigan.

Total present 47. Quorum present.

The minutes of 3 April 2019 were present and the following corrections were made:

Remove space in Introduc tions to read Introductions.

Add s at end of year to read 30 years and 40 years.

In Roll Call of Chapters change Cape May to read Cape May P +2 vice P +1.

Change *Recessed until 0800, 4 August 2019* to read *Recessed until 0800, 4 April 2019*.

Motion by YNC Kim Lorigan to accept the minutes as corrected. Motion seconded by National Treasurer. Motion Carried.

51<sup>st</sup> National CPOA Convention  
Herndon, VA

3-5 April 2019

Captain Michael Barton addressed the convention delegate on Coast Guard Ethics concerning the receiving of monies during the past government shut down and the development of a Coast Guard wide Ethics Handbook.

0805 Marianas Guam arrived.

0910 Lone Star arrived.

Mr. Willie Woolford from Bellevue University addressed the convention delegates.

Motion by National Secretary YNCS Bruce Garrison to make Mrs. Sarah Isherwood an Honorary Silver Lifetime Member in the Association for her work in the National Office after the resignations of the National President, National Treasurer and Executive Director. Motion seconded by YNC Alex Chapman. Motion carried.

*0932 Recessed until 0900, 5 April 2019*

## FRIDAY 5 APRIL 2019

*0900 Reconvened*

### **Roll Call of National Board of Directors:**

National President	BMCS Jon Ostrowski	Present
National Vice President	BMCS Charlie Womack	Present
National Secretary	YNCS Bruce Garrison	Present
National Treasurer	CWO2 Mark Tahtinen	Present
Region 1 Advisor	MKCM Dave Isherwood	Present
Region 2 Advisor	HSCM Tyrone Anderson	Excused Absence
Region 3 Advisor	CWO2 Amy Ponce	Present

### **Roll Call of Chapter:**

Boston 1, Cape May 1, Crystal Coast 1, Derby City Sluggers 1, Elizabeth City P +2, Golden Gate P T +3, Golden Triangle 1, Hampton Roads P +2, Hawaiian Islands 1, Kodiak T, Lone Star 1, Long Island 1, Lost Coast P, Low Country 1, Marianas Guam 1, Members at Large 1, Miami 1, Mobile P +3, New Orleans VP, Northeast Florida P +2, Northern New England P, Oklahoma City P, River City Blues S T +1, SE Connecticut P S, Seattle 3, SOO 1, Southernmost 2, Sun Coast P VP S +1, Washington DC 3, Yorktown P +1.

Total Present 55. Quorum present.

The following Chapters were not present at time of roll call:

Alexandria, Baltimore, Cape Cod, Eastern Great Lakes, Gold Country, Grand Haven, Greater Alaska, Greater Detroit, Green Bay, Jersey Shore, Juneau, Ketchikan, Kleckner, Los Angeles/Long Beach, Lower Columbia River, Martinsburg West Virginia, Mid America, New Haven, North Bend, North Coast, Pan Handle, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, South Texas, St Louis, Traverse City, USCG Desert CPO Bahrain, Western Lake Michigan.

Motion by National Treasurer to accept the minutes of 4 April 2019 as printed. Motion seconded by National Vice President. Motion carried.

A Senior Enlisted and Gold Badge Panel (Support) addressed the convention delegates and answered questions.

*1008 Recessed*

*1020 Reconvened*

A Senior Enlisted and Gold Badge Panel (Operations) addressed the convention delegates and answered questions.

Miss Helen Pickard from the Virginia State Veterans Services address the convention delegates and answered questions.

*1126 Recessed*

*1300 Reconvened*

**Roll Call of National Board of Directors:**

National President	BMCS Jon Ostrowski	Present
National Vice President	BMCS Charlie Womack	Present
National Secretary	YNCS Bruce Garrison	Present
National Treasurer	CWO2 Mark Tahtinen	Present
Region 1 Advisor	MKCM Dave Isherwood	Present
Region 2 Advisor	HSCM Tyrone Anderson	Excused Absence
Region 3 Advisor	CWO2 Amy Ponce	Present

**Roll Call of Chapters:**

Boston 1, Cape May P +4, Crystal Coast 1, Derby City Sluggers 1, Elizabeth City P +1, Golden Gate 2, Golden Triangle 2, Hawaiian Islands P +1, Kodiak T, Lone Star 1, Long Island 1, Lost Coast P, Low Country 1, Members at Large 1, Miami 1, Mobile P +2, New Orleans VP, North Bend 1, Northeast Florida P +2, Northern New England P + 1, Oklahoma City P, River City Blues S T +1, SE Connecticut P S, Seattle 2, SOO 1, Southernmost 1, Sun Coast P VP S +1, Washington DC 3, Yorktown P +1.

Total present 52. Quorum present.

The following Chapters were not present at time of roll call:

Alexandria, Baltimore, Cape Cod, Eastern Great Lakes, Gold Country, Grand Haven, Greater Alaska, Greater Detroit, Green Bay, Hampton Roads, Jersey Shore, Juneau, Ketchikan, Kleckner, Los Angeles/Long Beach, Lower Columbia River, Marianas Guam, Martinsburg West Virginia, Mid America, New Haven, North Coast, Pan Handle, Petaluma, Port Angeles, Prince William Sound, San Diego, San Juan, Silverdale, South Texas, St Louis, Traverse City, USCG Desert CPO Bahrain, Western Lake Michigan.

The Special Projects Convention Committee Report was presented. Report adopted. **(Encl: 5)**

The By-Laws Convention Committee Report was presented. Report adopted. **(Encl: 6)**

The Long Range Planning Convention Committee Report was presented.



The following pen and ink corrections were made:

Remove the word Standing from Subject line.

Paragraph 1. Change MKC Haley Milyard to MKC April Reid.

Paragraph 2 B c Change CGEA Chapters to read CGEA Branches

Paragraph 2 B c i Change chapters to read Branches.

Report adopted as amended. **(Encl: 7)**

The Convention Convention Committee Report was presented. Report adopted. **(Encl: 8)**

The CCCAF Convention Committee Report was presented.

Motion by National Secretary to send report back to committee to submit a different essay question for the CCCAF Scholarship. Motion seconded by National Vice President. Motion carried.

*1345 Recessed*

*1351 Reconvened*

CCCAF Convention Committee Report sent back to committee.

The CPO Academy Convention Committee report was presented. Report adopted **(Encl: 9)**

The Membership Convention Committee report was presented. Report adopted **(Encl: 10)**

*1430 Recessed*

*1450 Reconvened*

CCCAF Convention Committee Report brought back on the floor. Committee recommended that paragraph 6. a. be changed to read:

6. The committee discussed and created two essay questions for this coming year's contests.

a. For the CCCAF Scholarship, the recommended question is: "Do automatic safety features in automobiles enhance or encourage distracted driving and a further erosion of basic driving skills."

Report adopted as amended. **(Encl: 11)**

The CGEA Convention Committee Report was presented. Report adopted as amended. **(Encl: 12)**

The Budget Convention Committee Report was presented. Motion by QMC Segelken to add a line item titled CGEA Special Projects in the amount of \$2000.00. Motion seconded by MCPO Al Bumgardner. Report adopted as amended (**Encl: 13**)

*1553 Recessed*

*1604 Reconvened*

## **GOOD OF THE ORDER**

CCCAF Walt Gore throw in netted \$ 1254.00.

YNC Alex Chapman President of the Mavericks Club announced that the club has raised \$ 1000.00 at their annual meeting. \$500.00 was donated to the CPO Foundation and \$ 500.00 to the hospitality room.

The National President BMCS Jon Ostrowski went around the room allowing everyone to give their closing remarks.

There being no further business a motion by National Vice President BMCS Charlie Womack to adjourn. Seconded by all in attendance.

*1709 Adjourned*

Enclosures:

- (1) Minutes of Thursday 23 August 2018
- (2) Annual Treasurer's Report
- (3) Executive Director's Annual Report
- (4) National President's State of the CPOA Report
- (5) Special Projects Convention Committee Report
- (6) By-Laws Convention Committee Report
- (7) Long Range Planning Convention Committee Report
- (8) Convention Convention Committee Report
- (9) CPO Academy Convention Committee Report
- (10) Membership Convention Committee Report
- (11) CCCAF Convention Committee Report
- (12) CGEA Convention Committee Report
- (13) Budget Convention Committee Report



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



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 Email: [coastguardcpoa@gmail.com](mailto:coastguardcpoa@gmail.com) (Exec. Director)  
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1 Apr 2019

From: National Treasurer

To: Chief Petty Officers Association Membership

Subj: ANNUAL REPORT

1. The following is the financial standing of the CPOA as of March 31, 2019:

2. Current Assets:

TD Bank

Type	Matures	Designation	Amount
Small Bus. M.Market		SilverLT	\$ 65,955
High Yield Savings			\$184,160
Companion Checking			\$ 1,500

Navy Fed

Type	Matures	Designation	Amount
CD	5/17/2025	CCCAF	\$ 31,485
CD	5/17/2025	CCCAF	\$ 31,485
CD	7/17/2019	SilverLT	\$112,535
CD	7/17/2019	SilverLT	\$112,535

PENFED

Type	Matures	Designation	Amount
Money Market	5/27/2019		\$112,959

BofA

Type	Matures	Designation	Amount
Checking			\$ 35,804
Bus. Interest Maximizer		CCCAF	\$ 29,850
Bus. Interest Maximizer		Reserve	\$ 30,115

Total Current Assets \$748,383

3. Property & Equipment:

Fixed Assets	\$269,970
Total Fixed Assets	\$269,970

TOTAL ASSETS \$1,018,353

4. The 2020 CPOA Budget was printed in the January 2019 edition of "THE CHIEF" to allow members to review and ask questions prior to Convention

Sincerely yours,

A handwritten signature in blue ink, appearing to read 'M. T. Tahtinen', with a long horizontal stroke extending to the right.

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

Encl: (1) 2013-2019 (YTD) Budgets (Projections submitted to Budget Committee for review)

Coast Guard Chief Petty Officers Association  
Account Listing

Account	CY19					Actual CY 2020	Budget CY2020	Budget CY2019	01/01 - 03/31	Budget CY2018	Actual CY 2018	Budget CY2017	Actual CY 2017	Budget CY2016	Actual CY 2016
	Actual CY 2020	Budget CY2019	01/01 - 03/31	Budget CY2018	Actual CY 2018										
<b>INCOME</b>															
Membership Dues															
Active-Duty Allotments	\$77,000.00	\$77,000.00	\$14,492.00	\$77,000.00	\$87,793.00	\$77,000.00	\$77,000.00	\$83,767.20	\$77,000.00	\$87,793.00	\$77,000.00	\$83,767.20	\$77,000.00	\$81,143.24	
Cash/Checks	\$39,000.00	\$39,000.00	\$5,077.00	\$39,000.00	\$28,760.32	\$39,000.00	\$45,600.00	\$29,102.20	\$45,600.00	\$28,760.32	\$45,600.00	\$29,102.20	\$45,600.00	\$39,811.00	
Credit Card Payments	\$5,000.00	\$5,000.00	\$1,266.00	\$5,000.00	\$192.00	\$5,000.00	\$6,000.00	\$5,963.84	\$6,000.00	\$192.00	\$6,000.00	\$5,963.84	\$6,000.00	\$3,892.00	
Retiree Allotments	\$97,000.00	\$97,000.00	\$17,276.55	\$97,000.00	\$94,230.26	\$97,000.00	\$97,000.00	\$89,406.54	\$97,000.00	\$94,230.26	\$97,000.00	\$89,406.54	\$97,000.00	\$91,100.00	
Members Dues payments online	\$10,000.00	\$10,000.00	\$12,836.33	\$10,000.00	\$25,610.88	\$10,000.00	\$10,000.00	\$16,804.32	\$10,000.00	\$25,610.88	\$10,000.00	\$16,804.32	\$10,000.00	\$11,043.98	
Silver Lifetime Purchases (Held at TD Bank)	\$3,000.00	\$3,000.00	\$800.00	\$3,000.00	\$2,947.00	\$3,000.00	\$3,000.00	\$3,102.00	\$3,000.00	\$2,947.00	\$3,000.00	\$3,102.00	\$3,000.00	\$0.00	
Sales of Product Income - Café Press	\$350.00	\$350.00		\$350.00	\$102.51	\$350.00	\$350.00	\$1,084.83	\$350.00	\$102.51	\$350.00	\$1,084.83	\$350.00	\$541.65	
The CHIEF Advertising Income	\$2,000.00	\$2,000.00	\$1,800.00	\$2,000.00	\$4,700.00	\$2,000.00	\$2,000.00	\$3,000.00	\$2,000.00	\$4,700.00	\$2,000.00	\$3,000.00	\$2,000.00	\$1,800.00	
USAA - Sponsorship (Affinity Program)	\$15,000.00	\$15,000.00	\$16,502.71	\$15,000.00	\$17,037.08	\$15,000.00	\$15,000.00	\$16,472.74	\$15,000.00	\$17,037.08	\$15,000.00	\$16,472.74	\$15,000.00	\$24,983.56	
50th Anniversary Fund			\$35,040.00		\$400.00					\$400.00		\$0.00		\$0.00	
CPO Academy Dinner															
Interest Earned															
Companion Checking Interest	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
High Yield Savings TD Bank Interest	\$0.00	\$0.00	\$29.77	\$0.00	\$183.94	\$0.00	\$0.00	\$183.30	\$0.00	\$183.94	\$0.00	\$183.30	\$0.00	\$183.11	
Reserve Fund Boa Interest	\$0.00	\$0.00	\$2.92	\$0.00	\$24.18	\$0.00	\$0.00	\$25.07	\$0.00	\$24.18	\$0.00	\$25.07	\$0.00	\$27.63	
Silver Lifetime TD Bank CD Interest (deleted)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Silver Lifetime TD Bank Interest	\$0.00	\$0.00	\$10.66	\$0.00	\$65.93	\$0.00	\$0.00	\$65.52	\$0.00	\$65.93	\$0.00	\$65.52	\$0.00	\$84.17	
Navy Fed CD #1 Matures 5/17/2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Other Ordinary Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$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	\$0.00	\$0.00	\$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	\$0.00	\$0.00	\$0.00	\$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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
<b>Total INCOME:</b>	<b>\$248,350.00</b>	<b>\$248,350.00</b>	<b>\$104,083.94</b>	<b>\$248,350.00</b>	<b>\$276,348.16</b>	<b>\$248,350.00</b>	<b>\$250,950.00</b>	<b>\$248,977.56</b>	<b>\$248,350.00</b>	<b>\$276,348.16</b>	<b>\$250,950.00</b>	<b>\$248,977.56</b>	<b>\$248,350.00</b>	<b>\$254,600.34</b>	
<b>CONVENTION EXPENSES</b>															
Awards	\$2,000.00	\$2,000.00	\$2,755.67	\$2,000.00	\$2,125.51	\$2,000.00	\$2,000.00	\$2,418.62	\$2,000.00	\$2,125.51	\$2,000.00	\$2,418.62	\$2,000.00	\$2,889.22	
50th Anniversary Fund			\$18,791.41	\$0.00	\$935.63					\$935.63				\$0.00	
Convention Expenses	\$1,000.00	\$5,000.00	\$2,272.35	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00	\$2,000.00	\$5,000.00	\$0.00	\$5,000.00	\$2,000.00	\$5,000.00	\$0.00	
President's Outstanding Chapter/Branch Incentive	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	
Convention Committee Expenses (Mailing Materials)	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00	
CPOA National BoD Expenses (includes tvl, per diem, hotel, President)	\$8,750.00	\$8,750.00	\$18,000.00	\$18,000.00	\$2,815.20	\$18,000.00	\$8,750.00	\$1,532.79	\$8,750.00	\$2,815.20	\$8,750.00	\$1,532.79	\$8,750.00	\$1,726.42	
Vice-President					\$2,657.36			\$1,615.55		\$2,657.36		\$1,615.55		\$1,494.00	
Secretary					\$1,563.49			\$1,609.63		\$1,563.49		\$1,609.63		\$1,395.70	
Treasurer					\$1,333.56			\$1,400.91		\$1,333.56		\$1,400.91		\$1,869.20	
Regional Advisor: Region 1					\$1,419.34			\$1,313.50		\$1,419.34		\$1,313.50		\$1,395.70	
Regional Advisor: Region 2								\$1,583.25				\$1,583.25		\$1,601.02	
Regional Advisor: Region 3					\$1,523.81			\$1,553.38		\$1,523.81		\$1,553.38		\$1,406.00	
CGEA National Officer Expenses (includes tvl, per diem, hotel, President)	\$5,000.00	\$5,000.00	\$10,000.00	\$10,000.00	\$2,294.95	\$5,000.00	\$5,000.00	\$2,294.95	\$5,000.00	\$2,294.95	\$5,000.00	\$2,294.95	\$5,000.00	\$1,417.37	
Vice-President					\$0.00			\$0.00		\$0.00		\$0.00		\$1,233.55	
Secretary					\$2,784.68			\$1,555.88		\$2,784.68		\$1,555.88		\$1,035.45	
Treasurer					\$3,493.99			\$0.00		\$3,493.99		\$0.00		\$1,557.40	
Executive Director					\$4,020.91			\$2,122.71		\$4,020.91		\$2,122.71		\$2,774.32	
<b>Total Convention Expenses:</b>	<b>\$20,250.00</b>	<b>\$24,250.00</b>	<b>\$25,025.19</b>	<b>\$38,500.00</b>	<b>\$24,673.48</b>	<b>\$20,250.00</b>	<b>\$23,250.00</b>	<b>\$21,001.17</b>	<b>\$23,250.00</b>	<b>\$24,673.48</b>	<b>\$23,250.00</b>	<b>\$21,001.17</b>	<b>\$18,250.00</b>	<b>\$21,795.35</b>	
<b>NATIONAL EXPENSES: CPOA BoD TRAVEL</b>															
National Officers															
President					\$1,086.07			\$533.61		\$1,086.07		\$533.61		\$334.28	
Vice-President					\$1,303.17			\$1,230.90		\$1,303.17		\$1,230.90		\$602.14	
Secretary					\$1,213.09			\$1,218.53		\$1,213.09		\$1,218.53		\$821.49	
Treasurer					\$1,068.96			\$0.00		\$1,068.96		\$0.00		\$591.00	
Regional Advisor: Region 1					\$1,203.85			\$1,218.53		\$1,203.85		\$1,218.53		\$847.02	
Regional Advisor: Region 2					\$0.00			\$650.00		\$0.00		\$650.00		\$1,387.94	
Regional Advisor: Region 3					\$1,281.90			\$1,064.32		\$1,281.90		\$1,064.32		\$293.20	
<b>NATIONAL EXPENSES: CGEA TRAVEL</b>															
<b>Total INCOME:</b>	<b>\$3,715.00</b>	<b>\$3,715.00</b>		<b>\$3,715.00</b>	<b>\$1,281.90</b>	<b>\$3,715.00</b>	<b>\$3,715.00</b>	<b>\$1,064.32</b>	<b>\$3,715.00</b>	<b>\$1,281.90</b>	<b>\$3,715.00</b>	<b>\$1,064.32</b>	<b>\$3,715.00</b>	<b>\$3,715.00</b>	



Coast Guard Chief Petty Officers Association  
Account Listing

Account	Budget CY2015	Actual CY 2015	Budget CY2014	Actual CY 2014	Budget CY2013	Actual CY 2013
President		\$1,335.92		\$869.60		\$587.74
Vice-President		\$750.11		\$642.06		\$776.00
Secretary				\$0.00		
Treasurer				\$872.50		
<b>Total CGEA/CPOA Travel:</b>	<b>\$11,000.00</b>	<b>\$8,212.32</b>	<b>\$9,000.00</b>	<b>\$8,967.28</b>	<b>\$14,000.00</b>	<b>\$9,193.57</b>
<b>NATIONAL EXPENSES (OPERATIONS)</b>						
Building Repair & Maintenance	\$2,000.00	\$1,956.75	\$2,000.00	\$4,681.05	\$2,000.00	\$3,813.37
Office Security System	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Equip & Software	\$2,000.00	\$4,275.76	\$2,000.00	\$39.99	\$3,000.00	\$409.70
Condo Association Fees	\$3,000.00	\$3,038.52	\$3,000.00	\$497.96	\$1,500.00	\$2,738.78
Credit Card Processing Fees	\$300.00	\$1,224.84	\$300.00	\$876.41	\$0.00	\$269.73
Membership Processing Expense	\$1,000.00	\$76.87	\$1,000.00	\$405.27	\$2,000.00	\$976.30
Membership: Electronic Communications (Constant Contact)	\$1,500.00	\$1,565.27	\$1,500.00	\$1,268.50	\$0.00	\$1,186.00
Memorial Fund	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00
National CPOA BoD Discretionary	\$1,000.00	\$0.00	\$500.00	\$300.00	\$300.00	\$0.00
National CGEA Officers Discretionary	\$1,000.00	\$0.00	\$500.00	\$0.00	\$500.00	\$0.00
Office Equipment & Furnishings	\$500.00	\$0.00	\$500.00	\$50.00	\$1,500.00	\$0.00
Office Machine Repair (includes maintenance contracts)	\$7,000.00	\$9,263.59	\$7,000.00	\$6,525.18	\$7,000.00	\$6,848.74
Office Supplies	\$1,500.00	\$2,921.73	\$1,500.00	\$1,338.34	\$4,000.00	\$1,236.40
Online Accounting Service (QuickBooks & Payroll)	\$1,500.00	\$1,079.40	\$1,500.00	\$605.40	\$0.00	\$383.52
Payroll (fnuit) - merged	\$0.00	\$0.00	\$0.00	\$378.00	\$0.00	\$1,137.00
Phone and Internet Bundle	\$1,800.00	\$1,804.00	\$1,800.00	\$1,754.07	\$2,500.00	\$1,640.06
Postage (includes equipment rental)	\$12,000.00	\$329.01	\$10,000.00	\$8,778.93	\$11,000.00	\$8,720.84
Publications (Off pubs, Roberts Rules, etc)	\$200.00	\$55.00	\$200.00	\$242.88	\$200.00	\$105.00
Employee Pay & Benefits						
Salary (Executive Director)	\$73,000.00	\$76,747.74	\$71,000.00	\$75,598.60	\$68,712.00	\$52,758.55
Employee Retirement Account	\$4,400.00	\$2,539.77	\$4,300.00	\$0.00	\$4,205.00	\$0.00
Medical Benefit Re-imbursment Account	\$3,000.00	\$1,022.65	\$3,000.00	\$588.76	\$2,500.00	\$609.61
Wages (Admin Assistant)	\$29,000.00	\$28,504.40	\$28,000.00	\$27,819.72	\$26,000.00	\$20,488.65
Executive Director Local Travel	\$600.00	\$156.00	\$600.00	\$317.00	\$1,200.00	\$58.25
Stationery & Printing	\$1,000.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$1,902.32
Utilities (gas & elec)	\$1,200.00	\$1,270.50	\$1,200.00	\$1,283.37	\$1,700.00	\$847.79
Website/Web Manager	\$500.00	\$2,141.45	\$8,000.00	\$7,656.82	\$13,500.00	\$11,340.00
IRS Penalties & Settlements	\$0.00	\$0.00	\$0.00	\$8,501.00	\$0.00	\$7,388.32
<b>Total National Expenses (Operations):</b>	<b>\$150,000.00</b>	<b>\$139,973.25</b>	<b>\$151,400.00</b>	<b>\$149,508.25</b>	<b>\$154,317.00</b>	<b>\$125,358.73</b>
<b>NATIONAL EXPENSES (TAXES/INSURANCE/LEGAL)</b>						
Business Liability Insurance						\$590.88
Corporation Costs	\$150.00	\$175.00	\$150.00	\$230.00	\$25.00	\$300.00
County Personal Property Tax	\$500.00	\$206.66	\$500.00	\$242.30	\$0.00	\$288.96
Liability Insurance	\$4,800.00	\$0.00	\$4,800.00	\$0.00	\$3,500.00	\$0.00
Professional Accounting Service (Financial Review)	\$0.00	\$0.00	\$3,400.00	\$3,500.00	\$0.00	\$0.00
Professional Accounting Fee	\$0.00	\$1,525.00	\$0.00	\$280.00	\$0.00	\$0.00
Federal Tax Return Preparation	\$1,500.00	\$0.00	\$1,500.00	\$1,485.00	\$5,100.00	\$2,002.87
Insurance Property	\$1,800.00	\$1,581.65	\$1,800.00	\$1,750.00	\$1,500.00	\$1,686.02
Legal Fees	\$2,000.00	\$4,663.25	\$1,000.00	\$528.75	\$1,500.00	\$2,392.00
Real Estate Tax	\$2,900.00	\$2,869.19	\$2,900.00	\$2,738.83	\$3,000.00	\$2,863.69
<b>Total National Expenses (Taxes/Insurance/Legal):</b>	<b>\$13,650.00</b>	<b>\$11,020.75</b>	<b>\$16,050.00</b>	<b>\$10,754.88</b>	<b>\$14,625.00</b>	<b>\$10,124.52</b>
<b>NATIONAL EXPENSES (Start Up Expenses):</b>						
Chapter (Start Up Fund)	\$600.00	\$500.00	\$300.00	\$141.10	\$0.00	\$462.05
Chapter (Start Up expenses)	\$1,500.00	\$123.65	\$900.00	\$0.00	\$0.00	\$706.28
Branches (Start Up Funds)	\$600.00	\$651.44	\$300.00	\$0.00	\$0.00	\$1,209.85
Branches (Start Up expenses)	\$1,500.00	\$577.93	\$900.00	\$1,358.34	\$0.00	\$0.00
<b>Total National Expenses (National Office):</b>	<b>\$4,200.00</b>	<b>\$1,853.02</b>	<b>\$2,700.00</b>	<b>\$1,499.44</b>	<b>\$0.00</b>	<b>\$2,378.18</b>
<b>NATIONAL EXPENSES (Programs):</b>						

Coast Guard Chief Petty Officers Association

Account Listing

Account	Budget CY2015	Actual CY 2015	Budget CY2014	Actual CY 2014	Budget CY2013	Actual CY 2013
CPO Academy Support (Spirits of the Chief Award)	\$2,000.00	\$1,103.40	\$2,000.00	\$0.00	\$1,100.00	\$1,072.80
CCCAF Program (Check Presentation to include Wall Gore award)	\$50.00	\$161.78	\$50.00	\$44.77	\$0.00	\$42.24
CPOA Foundation	\$0.00	\$323.17	\$0.00	\$0.00	\$0.00	\$0.00
EPOY Program Dinner	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,773.00
Awards (EPOY)	\$800.00	\$440.71	\$300.00	\$568.06	\$300.00	\$0.00
National Election Support	\$200.00	\$220.45	\$0.00	\$0.00	\$0.00	\$0.00
25 year pin	\$0.00	\$1,200.00	\$1,500.00	\$34.75	\$0.00	\$0.00
35 & 50 year pins	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Membership Pin, Postage	\$750.00	\$203.10	\$1,000.00	\$465.00	\$0.00	\$430.56
50 Year Coin	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Gold Lifetime Award	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
COMDT National Retiree Council Support	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Coast Guard Museum support	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CGEA Membership (25 yr pin)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
VA Veterans Day Ceremony	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total National Expenses (Programs):	\$3,250.00	\$3,887.43	\$4,300.00	\$2,567.81	\$1,800.00	\$2,203.56
Walter Gore Scholarship	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PUBLICATION EXPENSES (The CHIEF Magazine):						
Postage/Labels/Distribution	\$15,000.00	\$15,555.55	\$14,000.00	\$16,435.23	\$11,000.00	\$13,499.57
Printing	\$33,000.00	\$30,350.00	\$33,000.00	\$23,765.00	\$34,000.00	\$31,603.00
Total Publications:	\$48,000.00	\$45,905.55	\$47,000.00	\$40,200.23	\$45,000.00	\$45,102.57
Grand Total Expenses:	\$261,100.00	\$235,336.18	\$247,750.00	\$229,580.04	\$253,042.00	\$225,256.55
End of Year Difference Between Project Budget and actual spending		\$6,613.82		\$12,575.96		\$27,785.45
Difference in Gross Receipts & Actual Expenses:		\$10,020.12		\$14,585.74		\$21,411.74
Other Income Expenses:						
Tampa Tribute	\$0.00	\$165.00	\$0.00	\$1,680.00		
CCCAF Interest		\$11.75	\$0.00	\$13.84		
CCCAF Donations/Contributions		\$5,602.00	\$0.00	\$2,074.00		
CCCAF Program	\$8,500.00	\$8,500.00	\$5,000.00	\$5,000.00		
CG Foundation #1 (CY17)						
CG Foundation #2 (CY17)						
CG Foundation #3 (CY17)						
CG Foundation #4 (CY17)						
Harvey Disbursement (CY17)						
Harvey Relief (CY17)						
Ima & Maria Rettef (CY17)						
Hurricane & Fire (CY17)						
CG Foundation #5 (CY18)						
Hurricane Michael Relief						
Florence Relief						
Typhoon Yutu						
Coins						
Tickets						





Coast Guard Chief Petty Officers Association  
Account Listing

Account	Budget CY2015	Actual CY 2015	Budget CY2014	Actual CY 2014	Budget CY2013	Actual CY 2013
<b>INCOME</b>						
Membership Dues	\$75,000.00	\$81,508.99	\$73,000.00	\$78,075.99	\$70,000.00	\$73,540.24
Active-Duty Allotments	\$45,600.00	\$40,943.73	\$43,000.00	\$47,100.31	\$40,000.00	\$47,126.40
Cash/Checks	\$6,000.00	\$6,068.12	\$5,000.00	\$5,000.00	\$4,500.00	\$5,983.00
Credit Card Payments	\$95,000.00	\$92,197.75	\$95,000.00	\$93,575.50	\$90,000.00	\$94,731.00
Reliree Allotments	\$0.00	\$4,672.08	\$0.00	\$0.00	\$0.00	\$0.00
Members Dues payments online	\$3,000.00	\$0.00	\$4,500.00	\$2,067.00	\$3,000.00	\$4,750.00
Silver Lifetime Purchases (Held at TD Bank)	\$350.00	\$352.02	\$300.00	\$0.00	\$0.00	\$714.72
Sales of Product Income - Cafe Press	\$2,000.00	\$3,000.00	\$2,400.00	\$3,200.00	\$1,500.00	\$3,600.00
The CHIEF Advertising Income	\$15,000.00	\$14,810.97	\$14,600.00	\$14,402.75	\$0.00	\$13,189.97
USAA - Sponsorship (Affinity Program)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
50th Anniversary Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
CPO Academy Dinner	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Interest Earned	\$0.00	\$1,517.80	\$0.00	\$0.00	\$0.00	\$373.21
Companion Checking Interest	\$0.00	\$187.84	\$468.00	\$575.82	\$0.00	\$371.91
High Yield Savings TD Bank Interest	\$0.00	\$37.81	\$132.00	\$52.49	\$0.00	\$102.15
Reserve Fund Boa Interest	\$0.00	\$0.00	\$3,600.00	\$0.00	\$0.00	\$1,784.11
Silver Lifetime TD Bank CD Interest (deleted)	\$0.00	\$59.19	\$156.00	\$115.92	\$0.00	\$173.67
Silver Lifetime TD Bank Interest	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$217.91
Navy Fed CD #1 Matures 5/17/2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Ordinary Income	\$0.00	\$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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total INCOME:</b>	<b>\$241,950.00</b>	<b>\$245,356.30</b>	<b>\$242,156.00</b>	<b>\$244,165.78</b>	<b>\$209,000.00</b>	<b>\$246,668.29</b>
<b>CONVENTION EXPENSES</b>						
Awards	\$2,000.00	\$1,799.25	\$1,500.00	\$1,056.15	\$0.00	\$2,110.65
50th Anniversary Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Convention Expenses	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
President's Outstanding Chapter/Branch Incentive	\$1,500.00	\$2,000.00	\$1,500.00	\$0.00	\$1,800.00	\$0.00
Convention Committee Expenses (Mailing Materials)	\$18,000.00	\$0.00	\$8,500.00	\$0.00	\$15,000.00	\$9,022.79
CPOA National BoD Expenses (includes tvl, per diem, hotel, President)		\$1,655.38		\$1,625.36		\$1,505.42
Vice-President		\$1,344.08		\$1,486.50		\$0.00
Secretary		\$1,344.08		\$1,486.50		\$1,411.90
Treasurer		\$1,537.20		\$1,455.80		\$1,299.19
Regional Advisor: Region 1		\$1,638.20		\$1,486.50		\$1,782.05
Regional Advisor: Region 2		\$3,227.40		\$1,638.00		\$1,483.45
Regional Advisor: Region 3		\$2,765.91		\$1,058.70		\$1,530.78
CGEA National Officer Expenses (includes tvl, per diem, hotel, President)	\$7,000.00	\$1,325.88	\$4,500.00	\$1,194.54	\$4,500.00	\$4,674.60
Vice-President		\$1,404.10		\$918.84		\$2,145.21
Secretary		\$1,664.10		\$0.00		\$1,340.21
Treasurer		\$1,576.60		\$1,599.00		\$0.00
Executive Director	\$1,500.00	\$1,195.68	\$1,300.00	\$1,076.26	\$2,000.00	\$1,189.18
<b>Total Convention Expenses:</b>	<b>\$31,000.00</b>	<b>\$24,483.86</b>	<b>\$17,300.00</b>	<b>\$16,082.15</b>	<b>\$23,300.00</b>	<b>\$30,895.42</b>
<b>NATIONAL EXPENSES: CPOA BoD TRAVEL</b>						
National Officers	\$7,000.00	\$1,557.26	\$7,000.00	\$1,565.36	\$12,000.00	\$3,412.51
President		\$1,005.96		\$0.00		\$1,163.81
Vice-President		\$1,089.46		\$1,154.42		\$801.04
Secretary		\$929.53		\$1,183.79		
Treasurer		\$0.00		\$1,154.42		\$917.01
Regional Advisor: Region 1		\$627.21		\$672.23		\$1,535.46
Regional Advisor: Region 2		\$916.87		\$852.90		
Regional Advisor: Region 3						
<b>NATIONAL EXPENSES: CGEA TRAVEL</b>	<b>\$4,000.00</b>		<b>\$2,000.00</b>		<b>\$2,000.00</b>	



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

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3 April 2019

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. **Disaster Relief:** We worked diligently to serve Coast Guard families in need impacted by Hurricanes Michael and Florence, Typhoon Yutu, and the California Wildfires. We received over \$350K into our disaster relief and response fund in partnership with the Coast Guard Foundation. More than 130 families were assisted with support covering home repairs, temporary living expenses, household goods and appliances, and insurance deductibles. The National Office would like to express our gratitude to the Mobile, SE Connecticut, and Cape May Chapters for stepping up to receive, and process, grant applications from the field.
- b. **Partial Government Shutdown:** Through Social Media, we quickly saw our Chapters and Branches setting up relief efforts nationwide. We were able to assemble a rapid response teams consisting of local Chief's from the National Captial Region to coordinate our efforts from our National office and assist as well. We again, worked closely with the Coast Guard Foundation to identify and disperse as much financial assistance available, to as many as possible. Over \$600K of Foundation grants were sent to Coast Guard familes in need. Post action, we requested and received data on how much our Chapters and Branches raised. Based upon the responses, over \$531K was raised and dispursed and nearly 5,000 hours of volunteer hours were expended. That's just in the numbers based upon responses. We can only imagine what the actual numbers were. Your efforts were not lost on Coast Guard leadership. Those Commands that allowed us to step in and assist should be commended. We could not be prouder of how our entire Association responded in such a stressful situation. It was difficult to see Coast Guard members standing in food lines, what you accomplished made such an important impact.
- c. With the hightened activities of our Chapters and Branches, we are currently witnessing a rapid increase in new members and growth. The Membership Coordinator and I have been doing our best to continue providing guidance and services to our new members. Please be patient with us as we work to manage requests and your expectations.
- d. The partial government shutdown identified a need for increasing growth and expansion of our Chapters and Branches. The Panhandle Chapter, Cape and Islands, Greater Alaska, and Coastal Empire Branches were recently installed. We've actually had to pause on processing petitions for 1 new Chapter and 2 Branches that also seek to establish. We will work to get them aboard immediately after Convention.
- e. With the increase in donations and income that some experienced this year, please keep in mind that if your Chapter or Branch raised more than \$50K this year, you will need to file your taxes separately to the IRS next year. Please ensure to set aside enough money to hire a CPA.

ENCL (3)

## EIN MANAGEMENT

- a. Issued EIN's to our 3 new Chapters and 3 new Branches (since August).
- b. Will be adding the new Chapter and Branch EIN's to our IRS Group Exemption List this month.
- c. In May, I will submit annual 990-N's for all Chapters and Branches that raised less than \$50K in 2018.

## COMPUTER SYSTEM

- a. All computer systems and the membership database are running as required.
- b. ED conducts weekly computer backups, MC conducts daily backups to ensure database integrity.

## ACCOUNTING

- a. Continue to utilize Quickbooks Online Essentials. National Treasurer has access to ensure continued transparency and oversight.
- b. Requested our Accountants file for an extension to our 2018 tax report to the IRS.
- c. Continue to work closely with the Budget Committee and the BOD to optimize our annual budget based upon actual expenditures.
- d. As a reminder, we completed a financial review last April, no discrepancies noted. We will continue to conduct a review every three years.

## SCHOLARSHIPS

- a. CCCAF and Walter Gore submissions were due 1 April. Once we're back in the office, we will work with the Chairman to commence grading and award selections.

## COMMUNICATION

- a. *The Chief Magazine*:
  - You may have noticed a slight change in our April magazine design and layout. Hopefully, it's well received and in a better format for reading.
  - I'm experiencing a low submission rate to the magazine. If you have photos of events you'd like published, please send them directly to me at: [ExecutiveDirector@uscgcpoa.org](mailto:ExecutiveDirector@uscgcpoa.org).
- b. E-Newsletter:
  - Presently sending to nearly 7,000 contacts and still receiving above average open rates.
  - The newsletter helps identify things that will be happening soon. If your Chapter or Branch has something to share that you think could help in your fundraising events, please take advantage of this communication tool and let me know.
- c. Facebook:
  - The CPOA Facebook page remains a valuable communication platform to quickly spread awareness about key issues, mobilize supporters, raise funds, and create online advocacy movements. The page has 6,970 followers, up from 3,893 last August. Our average reach is 40,000 people per month.
  - The CGEA Facebook page managed by CGEA members presently has 1,131 followers. The page has also started "*From the Deckplate! Live!*" that features interviews with Branch Presidents that appears to be well received.
  - The CPOA President has a brand new page which is quickly becoming popular with 2,179 followers.
- d. LinkedIn:
  - Presently has 2,227 members, up from 2,163 last August.
- e. Twitter:
  - Presently has 503 followers, up from 460 last August.

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

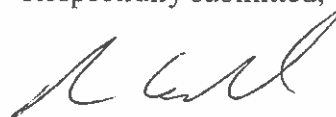
- a. I continue to serve as TMC's Treasurer.
- b. We signed on to 1 Coalition letter since August 2018, all of which can be found on the TMC website which is linked to our e-newsletter.
- c. 2018 legislative goals were published in our e-newsletter.
- d. Continue to work closely with the Coalitions' communication committee to improve our outreach. With over 5.5 million combined members, having a social media strategy substantially increases our strength and influence.

## **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 and provided \$1,500 to CCCAF last year. We are under contract with USAA until August 2021.
- b. First Command, Homeland Security Today, and the Coast Guard Museum – They are all relatively new to us and they will have representation and sponsorship at our 50<sup>th</sup> Anniversary Gala on Saturday. We will work with them closely to see if their services bring value to our membership. We also worked with the Sea Service Family Foundation during the shutdown on Senate Bill 21, the Pay the Coast Guard Act.

2. This has been another great year at National. Financially, we closed out FY 2018 \$884 under budget. We have \$748K in monetary assets in various bank accounts and \$270K in fixed assets. Pending any unforeseen expenditures, I expect us to be solidly in the black in 2019. We welcomed 3 new Chapters and 3 new Branches since 1 August 2018. I am honored to be in my 8<sup>th</sup> year serving as your Executive Director and greatly appreciate your continuing support.

Respectfully submitted,



R. G. Reid





United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION

5520 Hempstead Way

Springfield, VA 22151-4009

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

Email: [President@uscgcpoa.org](mailto:President@uscgcpoa.org) (CPOA National President)  
[ExecutiveDirector@uscgcpoa.org](mailto:ExecutiveDirector@uscgcpoa.org) (National Office)



03 April 2019

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

Subj: PRESIDENT'S 2019 FINAL REPORT ON THE STATE OF THE CPOA

1. As required by the CPOA Operations Manual, this report is submitted to our Association's membership.
2. **MEMBERSHIP:** As of 1 April 2019, our Association's total membership is 10,384. The CPOA membership stands at 8,257, and the CGEA membership is now 2,127. Since 13 August 2018, our Association has welcomed 13 new Silver Lifetime Members three new Chapters; Greater Alaska, Panhandle, and the River City Blues; and three new CGEA Branches; Cape and Islands, Greater Alaska, and Coastal Empire. **A huge THANK YOU goes out to the CGEA President YN1 Casey Lawrence and YN3 Sammy Whaley and all CGEA members ~ their recruiting efforts and enthusiasm for the CGEA have resulted in the addition of an incredible 3 new CGEA Branches since the 2018 convention and 565 CGEA members!**
3. **FINANCIAL ISSUES:**
  - a. Our Association looks to close out FY-2018 with the balance sheet showing a surplus of \$884. The CPOA's total valuation is approximately \$1,018,353 (\$748,378 in Checking/Savings/CDs and \$269,970 in assessed real property). As of this date, FY-2019 is on course to be solidly in the black. **Many thanks to CPOA Treasurer, CWO Mark Tahtinen, for his outstanding efforts in drafting the proposed 2020 annual budget.**
  - b. Upon completion of our 2018 taxes, and review by the CPOA Treasurer, and the Board of Directors, a finalized financial report will be posted on our website.
4. **CAPT Caliendo College Assistance Fund (CCCAF) & Walt Gore Memorial Scholarship (WGMS):**
  - a. Submissions were due 1 April 2019. The winners will be published in the "Chief" magazine, social media and CPOA website, upon selections of the 2019 CCCAF Scholarship.
  - b. The 2019 Walt Gore Memorial Scholarship winners will be published in the "Chief" magazine, social media and CPOA website, upon selections.
  - c. The CCCAF Standing Committee Chair continues to encourage all members of the CPOA and CGEA who are pursuing college or graduate degrees to apply for the Walt Gore Memorial Scholarship.
5. **CPO ACADEMY SPIRIT OF THE CHIEF AWARDS PROGRAM:** The CPOA provides twelve awards for Active Duty Classes and two Reserve Class Awards annually. The Welcome Dinner Program endures due to the hard work of the Petaluma Chapter members and the generosity of our CPOA Chapters and Members who have routinely sponsored the dinners. This year we are extremely thankful to have First Command sponsor many of the dinners and appreciate their generosity.
6. **COMMUNITY SERVICE:** Our CPOA Chapters and CGEA Branches continue to do amazing work in our communities, donating funds and efforts to various charities throughout the year. With the devastation from hurricanes Florence and Michael, Typhoon Yutu, the California wildfires and the government shutdown in December 2018, CPOA was challenged like we have never seen before by our Association. Our CPOA Chapters and CGEA Branches worked tirelessly to assist all members of the Coast Guard (active, reserve, civilian) who needed financial assistance as well as sustenance. Partnering with the Coast Guard Foundation, and receiving donations from private citizens and businesses, the CPOA Chapters and CGEA Branches were able to distribute over \$1.5 million in financial relief through our network—an accomplishment we should all be proud of and hopefully we will never need to repeat. The shutdown displayed the true strength and capabilities of our Associations to all. The CPOA is Ready, Relevant and Responsive to our Coast Guard Families and communities.

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

ENCL (4)

03 April 2019

Subj: PRESIDENT'S 2018 FINAL REPORT ON THE STATE OF THE CPOA

7. **VETERANS DAY CEREMONY:** On 11 November 2018, our Association participated in the Department of Veterans Affairs Veterans Day Ceremony with our fellow Military Associations. CPOA National President **BMCS Jon Ostrowski**, YNC Jere Mills, YNC Elias Schawohl, and our Executive Director, Randy Reid represented the CPOA at the Arlington National Cemetery ceremony and laid a wreath at the Tomb of the Unknown Soldier. My thanks to all for representing the CPOA and CGEA.
8. **EPOY/REPOY CEREMONY:** On 10 May 2019, CPOA will attend the annual EPOY/REPOY ceremony here in D.C. We will once again provide brand new SDB jackets to the newly advanced awardees, BM3 Jakob R. Blass, (Active) and BM2 Michael A. Gould, (Reserve).
9. **MEDIA PLATFORMS:**
  - a. *The Chief* – our Association's quarterly magazine continues to receive positive reviews from our membership. As you may have noticed, we changed the format recently.
  - b. Monthly Newsletter – the CPOA/CGEA Newsletter provides timely information to over 6314 Association members.
  - c. Facebook / LinkedIn – the CPOA Facebook page currently has over 6793 followers, and our LinkedIn page has 2199 members. Both continue to serve as great venues to keep our membership informed about Association events, as well as attracting new and former members.
  - d. Thank you to our web managers, CWO2 (Ret) Michael Babischkin and BMC Phillip Null, for your continued support.
10. **THE CGCPO FOUNDATION:** The CGCPO Charitable Foundation continues to accept tax-exempt donations and is listed on the Amazon Smile Program. **THANK YOU to President MCPO Mark Pearson, Vice President CMC Jason Wong, Secretary YNC Virginia Lutz, and Treasurer Mrs. Janet Cantrell who continue to volunteer their time and talents as members of the CPO Foundation Board. Your dedication to this very worthwhile charity, which benefits members of our Coast Guard Family, is greatly appreciated.**
11. **CONTINUING A UNIQUE PARTNERSHIP:** With hurricanes Florence and Michael, wildfires in Southern California, and the recent government shutdown of 2018-2019, our partnership with the Coast Guard Foundation (CGF) has proven to be successful. Between the Coast Guard Foundation's ability to raise money and the CPOA's and CGEA's vast network, together, we are capable of providing financial relief grants to those impacted by any crisis. Because of our successes working together, our partnership will continue to strengthen, and our capabilities will grow. An enormous **THANK YOU**, to all of our membership for helping our Coast Guard family endure these trying times.
12. **IN CLOSING:** Our Association's financial situation is healthier than ever, and our membership numbers are on the rise. Our Chapters and Branches continue to do their utmost to keep our Associations strong and thriving, and our members are second to none. For the past 50 years, the men and women of the CPOA have weathered challenges, celebrated accomplishments and grown into an organization we can all be justifiably proud of. To the **CGEA National Officers, CGEA Branches and members** – I am proud of all you have accomplished! I ask you to continue your commitment to caring for the Association that you will one day be leading. Remember, you are our future! To the **National Office Staff** – thank you for all you have done and continue to do in keeping our Association running smoothly. Finally, it is an honor to be able to serve as your National President and I look forward to serving continuing to serve our membership. As always, **THANK YOU** everyone for your continued support of the CPOA and the CGEA.

Serving those who serve others,  
BMCS Jon Ostrowski (Ret.)

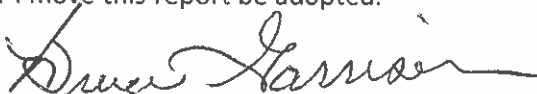


From: Special Projects Convention Committee

To: Convention Delegates 51st National CPOA Convention

Subj: Special Projects Convention Committee Report

1. The Special Projects Convention Committee met on 3 April 2019 at the Hyatt Regency Hotel Herndon, Va.
2. The Committee Chairman informed the members of the Committee of the duties of the Special Project Committee.
3. This Committee requests that all Chapters and Branches advertising in the Association's magazine (The Chief) review their ads to insure that they are up to date and current.
4. If a Chapter or Branch is not currently selling an item advertised in the magazine they are instructed to contact the Executive Director to have their ad removed.
5. If a Chapter or Branch needs to update their ad they need to contact the Executive Director.
6. If a Chapter or Branch is not currently advertising and item or items in The Chief and wishes to do so, they are must submit their request through the Executive Director who will forward it to the Special Projects Committee for review to ensure that it does not conflict with another Chapter's or Branches' ad.
7. All Chapters and Branches are reminded that they are authorized one free ad in The Chief.
8. All Chapters and Branches are reminded that the CPOA and CGEA LOGOs are the exclusive property of the Association, and that the use of these LOGOs to sell items outside their local Chapter or Branch must be requested from and approved by the National Board of Directors.
9. This Committee wishes to thank the Executive Director for his hard work in ensuring that The Chief magazine is compiled in a professional manner and the monthly News Letter is sent out on time.
10. I move this report be adopted.



Bruce Garrison, YNCS, Ret.  
Special Projects Committee Chairman

- Committee Members:
  - MSTC Carl Shepard
  - BMC Matt Pittman
  - YN2 Rafael Ramos
  - MKCM Dave Isherwood

ENCL(5)

Bylaws Convention Committee Report 2019

1. Discussed and confirmed the Convention Committee will continue to work as the By Laws Standing Committee throughout the coming year.
2. Found the wrong version of our By Laws posted on our website. Further research shows change 1 was made in 2011. These changes are administrative and have not affected the operation of the Association. The By-Laws Standing Committee will correct the discrepancy, insert Change 2, approved during the 50<sup>th</sup> National Convention, and publish.
3. Discussed changes that need to be made to the By Laws. The Standing Committee will provide resolutions to the 52<sup>nd</sup> Annual Convention for the following:
  - a. Removal of CPOAA. Their Charter has been surrendered. Chapters may have an Auxiliary under their own incorporation. Maintaining responsibility of Auxiliary Units may be a liability.
  - b. Removal of selection process for Gold Lifetime Member. This process is outlined in Sect XV of the Opsman and are in conflict.
  - c. Clarification of Parliamentary Authority. Robert's Rules has only one version in print. No need to have the Call to Convention determine which version to be used.
4. The Standing Committee will publish changes to the Opsman from the 50<sup>th</sup> Annual Convention.
5. I move this report be adopted.



SCPO Charlie Womack

Committee Chairman

Members: SCPO Craig Breverman, MCPO Al Bumgardner, CPO Andrew Zylinski



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[ExecutiveDirector@uscgcpoa.org](mailto:ExecutiveDirector@uscgcpoa.org) (National Office)

04 April 2019

From: The Long Range Planning Committee  
To: National President

Subj: Long Range Planning ~~Standing~~ Convention Report

1. The committee was comprised of the following members CWO (Ret) Amy Ponce, BMCS Eric Silvoy, MSTC Jason Walker, YNC (Ret) Jack Murphy, CPO (Ret) Frank Smith, MKC ~~Haley Mityard~~, ET1 Cordell Benner, ME2 Daniel Towey. *APRIL REID*
2. The Long Range Planning Convention Committee convened on 04 April 2019 to review old business and to develop new initiatives for consideration.
  - A. Old Buisness reviewed the procurement of and use of Voice Vote, discussed ways to become more proactive with the CPO Academy, discussed increased participation at Convention. The committee recommended; outreach to all Chapters through various media, an explanation of the importance and revelance of our Annual Convention.
    - a. Committee recommends not to proceed with voice vote. Start cost \$3,000, plus \$1,500 a year. No further action needed.
    - b. CPOA National has increased it's use of social media, and conducted a successful online campaign advertising this year's National Convention.
  - B. Committee Recommendations The Long Range Planning Committee has strategized three initiates to progress the CPOA and CGEA over the next 2-3 years. The committee recommends:
    - a. Social Media and Outreach. Implement a National media and outreach Standing Committee responsible for coordinating modernized social media intiatives. This effort would enable local chapters to creatively promote CPOA's leadership, history, in an inclusive enviroment on the National CPOA Facebook site. Action to include:
      - i. Implement National Committee
      - ii. Seek outgoing CPOA spokesman and committee members
      - iii. Schedule live Facebook events with local chapters. Similar to CGEAs current efforts.

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

- b. Update CPOA Operational Manual: The current CPOA manual provides chapters with chapter rules, and guidance. Recommend updating manual or creating a user guide to provide concise direction and to assist chapters on the following:
- i. Create a template enclosure that provides a sample script of how a CPOA & CGEA meeting should be run. This information would be a guide for units to maintain the conformity of parliamentary rules, and create uniformity throughout all chapters.
  - ii. Insert information concerning the FAQ on fundraising for chapters.
  - iii. Create an a template enclosure for a chapters BiLaw format and instruction.
  - iv. Update Chapter of the year award criteria to include an active Facebook page with points awarded on specific post criteria.
- c. CPOA/CGEA Mentor Mentee. Develop a mentor/mentee partnership between the CPOA and CGEA. Align CPOA chapters to sponsor specific CGEA <sup>BRANCHES</sup> chapters. This would allow members in the CPOA to support a specific chapter creating an inclusive partnership while developing the next generation of Chiefs. Partnering these organizations would allow Chiefs to assist with large transfer seasons of key personnel, while maintaining continuity. Recommend the following:
- i. Create a sponsor line under the CGEA contact ~~chapter~~ <sup>BRANCHES</sup> list that would identify Mentor  
~~Chapter~~/Sponsor  
~~BRANCHES~~

Respectfully Submitted



Eric S. Silvoy, BMCS  
Chairman



**United States Coast Guard**  
**CHIEF PETTY OFFICERS ASSOCIATION**  
2019 Convention Committee Report  
for  
2020 Convention Planning  
<http://uscgcpoa.org>



From: 2019 CPOA Convention "Convention Committee"  
To: 51<sup>st</sup> Annual USCG CPOA National Convention  
Subj: 2019 CPOA CONVENTION "CONVENTION COMMITTEE REPORT"

1. The Convention Committee met on 04 April 2019 at 1000 EST.
2. This Committee recommends the following:
  - a) Committee commenced with the question, "What can we do better" to ignite our conversation. The following are recommendations to provide a more informed attendee for the CPOA Convention.
  - b) Recommend to continue developing a first timer's guide to convention attendance to be developed and published to the website and a PDF link included via email upon registration. It was also recommended to continue to develop and refine a detailed schedule of events. First time convention attendees guide to include the following. MKC Jennifer Collins taking lead. (no cost)
    - 1) Agenda
    - 2) Uniform/Attire requirements
    - 3) Parliamentary procedure meeting
    - 4) Expectations of cost for event and additional costs for fundraising as applicable.
    - 5) Expectations for Chapter/Branches selling items from their respective location.
    - 6) Expectations for Community service to include what to bring.
    - 7) Provide a synopsis of committees and what they do.
    - 8.) List of activities for guests of convention attendees to do while convention in session.
    - 9.) Look into a way for providing a registered attendees list for pre-convention networking and communication.
  - c). Community service remains a vital part of our organization and should be continued at future conventions. Suggestion to coordinate with (Local area) Chiefs Mess or CPOA for 2020 convention project. It was recommended to consider the weather in scheduling community service especially in warmer climate areas. (no cost)
  - d). Promote Outstanding Chapter process through convention communications.
  - e.) Provide the option and receive special meal requests (ex. Vegan) during the registration process.
  - f.) 2020 Convention: Looking into Pacific Northwest options, potential for Seattle, WA & Portland, OR. Potential social outing in the area linked to local sporting event for convention attendees and guests.
  - g.) Potential changeover Convention Committee Chairman position.

3A. I move this report be adopted.

Committee Chairman  
QMC (Ret) William Segelken





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



<http://uscgcpoa.org>

From: Chief Petty Officer Academy Convention Committee

To: 51st Annual CPOA National Convention

Subj: Chief Petty Officer Academy Convention Committee Report

1. The CPO Academy Convention Committee met on 04 April 2019. Members in attendance:

MKC Gregory Porter (RET) – Chair  
BMCS Richard Marston  
MKCS Robert Linn  
YNCS Clara Whitehead  
YNCS Kellie Dean

YNCS Phil Payne  
BMC Kirstin MacLean  
ISC Charles Taylor Jr.

2. The committee recommends that the Chief Petty Officer Academy Standing Committee research a class sponsor program concept with the intent to draft a proposal to present at the 52<sup>nd</sup> Chief Petty Officer Association National Convention. The committee suggests that the program:

- a. be designed with the intent to bring added value to both CPOA and the CPO Academy,
- b. integrate a retiree/mentor for the each Chief Petty Officer Academy class to serve as a visible and active mentor to the class to provide advise, mentorship, leadership, and an additional source of counsel for class members to utilize, and
- c. require the retiree mentor to be a current member of the Chief Petty Officer Association.

3. The committee recommends providing limited travel reimbursement for one CPO Academy “Spirit of the Chief” Awardee to attend the upcoming CPOA National Convention.

- a. Those awardees interested in attending National Convention would compete for travel reimbursement by submitting an essay detailing their efforts that led to receipt of the “Spirit of the Chief” Award. The Standing CPO Academy Committee would establish essay perimeters and then vote on entries.
- b. We suggest that the winning essay, and awardee bio, be published in The Chief magazine.
- c. We suggest that the travel reimbursement be capped at \$1000.

4. The committee recommends local chapters sponsor the first year of membership to the Chief Petty Officer Association for newly advanced Chiefs. A Membership Committee member took that suggestion to their breakout session for further development.

5. The committee recommends that the Chief Petty Officer Academy Standing Committee research the cost of providing a simple, standardized CPOA membership coin to new members to provide a tangible, lasting symbol of their membership.

6. I move this report be adopted.

MKC Gregory Porter (RET)  
Convention Committee Chair



United States Coast Guard  
CHIEF PETTY OFFICERS ASSOCIATION &  
ENLISTED ASSOCIATION



<http://uscgcpoa.org>

From: 2019 Membership Convention Committee

To: 51<sup>st</sup> Annual CPOA/CGEA National Convention

Subj: 2019 MEMBERSHIP CONVENTION COMMITTEE REPORT

1. The Membership Convention Committee (MCC) met at 0930 on 04 April 2019.
2. The following CPOA and CGEA members were present:

MSTC Erin Everson

MSTCM Ann Logan

BMC David Eddie

*FTEM* Lonnie Jones

SK2 Elizabeth Gathman

YNCS Kellie Dean

3. Recruitment: The MCC discussed that the development of a Recruitment Month Campaign to encourage new membership. The committee recommends contacting Headquarters to determine the best month for the campaign. MCC recommends a "We need you, Remember when..." approach to include video footage of CPOA/CGEA in action during difficult times (shutdown, natural disasters, etc.). Committee also recommends gifting a one year paid membership to anyone who signs up for CPOA or CGEA during this month.
4. Recruitment / Retention: MCC discussed the need for better communication and utilization of retired members. Committee recommends coordinating with the Retiree Council and placing a recurring ad in the Retiree Newsletter soliciting membership and support.
5. Recruitment / Retention: MCC discussed having representatives from the fastest growing chapters and branches chair the MCC at future conventions. MCC recommends the representatives present their best practices in recruiting to the convention.
6. Retention: MCC recommends keeping the membership dues at the current rate for both CPOA and CGEA.
7. The Membership Convention Committee adjourned at 1045 on 04 April 2019
8. I move this report be adopted as written.

Respectfully submitted,

MSTC Erin E. Everson, CPOA Sun Coast Chapter Secretary



4 Apr 2019

From: CCCAF 2019 Convention Committee Chairman, SKC (ret) Anthony Lim  
To: CPOA 51<sup>st</sup> Annual Convention  
Subj: CCCAF 51<sup>st</sup> Annual Convention Committee Report

1. The CCCAF 51<sup>st</sup> Convention Committee met at 0930 on April 4, 2019; the following members volunteered for the committee:  
MCPO Glenn Lambert (ret)  
CPO Kim Lorigan (ret)  
CPO Anthony Lim (ret)  
CPO Mandy Bowen  
PO Tom Albert
2. This year there was an increase in the number of Walt Gore Scholarship submissions, allowing a judging to take place for the first time. The committee recommends continuing efforts to increase awareness of the available CPOA scholarships.
3. The committee is pleased to announce that there are monetary awards for 1<sup>st</sup> through 3<sup>rd</sup> place CCCAF winners this year. As a reminder, awards are funded through donations to CCCAF. Thank you for making this year a success.
4. The subject of the addition of all dependents, including spouses, to be eligible recipients of the CCCAF Scholarship was discussed. The committee recommends no change but the topic remains open for further discussion.
5. To maintain the current level of award availability, the committee recommends seeking sponsors to increase contributions to CCCAF. This would allow award stability for the scholarship.
6. The committee discussed and created two essay questions for this coming year's contests.
  - a. For the CCCAF Scholarship, the recommended question is: ~~"Do you agree with your parents' political beliefs? Why or why not?"~~ *Do automatic safety features in automobiles enhance safety or encourage distracted driving and a further erosion of basic driving skills.*
  - b. For the Walt Gore Scholarship, the recommended question is: "As a result of decreasing and more navigable sea ice, should the U. S. Coast Guard construct a nuclear-powered fleet of icebreakers in order to maintain a continuous year-round presence in the Arctic? Why or why not?"
7. I request this report be adopted. *AS AMENDED.*

  
Anthony Lim, SKC (ret)  
2019 CCCAF Convention Committee Chair

CORRECTED COPY

4 Apr 2019

From: CCCAF 2019 Convention Committee Chairman, SKC (ret) Anthony Lim  
To: CPOA 51<sup>st</sup> Annual Convention

Subj: CCCAF 51<sup>st</sup> Annual Convention Committee Report

1. The CCCAF 51<sup>st</sup> Convention Committee met at 0930 on April 4, 2019; the following members volunteered for the committee:

MCPO Glenn Lambert (ret)

CPO Kim Lorigan (ret)

CPO Anthony Lim (ret)

CPO Mandy Bowen

PO Tom Albert

2. This year there was an increase in the number of Walt Gore Scholarship submission, allowing a judging to take place for the first time. The committee recommends continuing efforts to increase awareness of the available CPOA scholarships.

3. The committee is pleased to announce that there are monetary awards for 1<sup>st</sup> through 3<sup>rd</sup> place CCCAF winners this year. As a reminder, awards are funded through donations to CCCAF. Thank you for making this year a success.

4. The subject of the addition of all dependents, including spouses, to be eligible recipients of the CCCAF scholarship was discussed. The committee recommends no change but the topic remains open for further discussion.

5. To maintain the current level of award availability, the committee recommends seeking sponsors to increase contributions to CCCAF. This would allow award stability for scholarship.

6. The committee discussed and created two essay questions for this coming year's contests:

a. For the CCCAF Scholarship, the recommended question is: Do automatic safety features in automobiles enhance safety or encourage distracted driving and a further erosion of basic driving skills.

b. For the Walt Gore Scholarship, the recommended question is: As a result of decreasing and more navigable sea ice, should the U.S. Coast Guard construct a nuclear-powered fleet of icebreakers in order to maintain a continuous year-round presence in the Arctic? Why or why not?

7. I request this report be adopted.

Anthony Lim  
2019 CCAF Convention Committee Chair

From: 2019 Convention Committee- CGEA

To: 51st Annual CPOA National Convention

Subj: 2019 CGEA Committee Report

1. The convention committee met on 05 April 2019

2. Committee recommends:

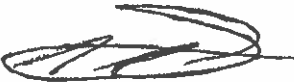
a. Financial support at national level to increase CGEA budget based on membership

b. Fostering a better understanding of the CGEA within local CPOA chapters

c. Addition to CPOA by laws to require joint meetings with aligning CGEAs and liaisons between CPOA and CGEA meetings

d. Support for branches from local chapters to include: mentorship, finances and up to \$1000 start up funds *AND ENCOURAGE SUPPORT OF*

3. I move this report to be adopted



OSC Roger Sharp  
CGEA Committee Chairman

Committee Members:

CSC Sean Culler

PA2 Meredith Manning

CS1 Jerry Wright

YN2 Whitney Waters

MK1 Erik Okonczak

MK1 Robert Hencken

SK2 Logan Stiles

YN3 Megan Johnston



United States Coast Guard  
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[cpoamembership@gmail.com](mailto:cpoamembership@gmail.com) (Membership)

5 Apr 2019

From: 2019 Budget Convention Committee

To: 51<sup>st</sup> Annual CPOA Convention

### BUDGET CONVENTION COMMITTEE REPORT

1. The committee met at this Convention to review the published 2020 CPOA Budget, which was printed in the January 2019 edition of "THE CHIEF" to allow members to review and ask questions prior to Convention.
2. CCCAF contributions from allotments for the period of 7/1/18 thru 6/30/19 will be reported at the 2020 Convention. The CCCAF Standing Committee will be notified in August 2019 of amount to be transferred.
3. The Budget Convention committee recommend an increase to the President Outstanding Branch Award (POBA) be increased to \$1,000 (from \$500) in order to help offset the cost of both hotel and airfare for Branches (Junior members that would attend) desiring to attend future conventions. CGEA will work with Branches to inform Branches that submissions of POBA do not need to reflect number of members or ability to fund raise, but rather all the good work a Branch does not matter the size of a Branch. But rather to capture all the goods things that Branches do. The convention committee felt that Chapters are represented and have the extra funds to offset additional cost. The award for will be presented this year, as both Cape May Chapter & SE Connecticut Branch are in attendance at the 2019convention.
4. The Budget Convention Committee recommended to increase the CPOA & CGEA Board Discretionary funds from \$500 to \$1,000 each to assist. With the understanding that CPOA books are run on a yearly basis and funds do not cross accounting years.
5. I move this report be adopted.

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

Budget Convention Committee Members:

BOSN2 Bryan Hoffman, CMC James Armstrong, SKCS Kody Fraughton, AETCS Roderick Hanson, SKC Jen DeJong, DVC David Partin, YN1 Tammy Bogart, YN1 Mandie Cloer, AMT2 Justin Lawrence

Enclosure: 2020 Budget

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

Coast Guard Chief Petty Officers Association

Account Listing

Account	Budget CY2020
<b>INCOME</b>	
Membership Dues	
Active-Duty Allotments	\$77,000.00
Cash/Checks	\$39,000.00
Credit Card Payments	\$5,000.00
Retiree Allotments	\$97,000.00
Members Dues payments online	\$10,000.00
Silver Lifetime Purchases (Held at TD Bank)	\$3,000.00
Sales of Product Income - Café Press	\$350.00
The CHIEF Advertising Income	\$2,000.00
USAA - Sponsorship (Affinity Program)	\$15,000.00
50th Anniversary Fund	
CPO Academy Dinner	
Interest Earned	
Companion Checking Interest	\$0.00
High Yield Savings TD Bank Interest	\$0.00
Reserve Fund Boa Interest	\$0.00
Silver Lifetime TD Bank CD Interest (deleted)	\$0.00
Silver Lifetime TD Bank Interest	\$0.00
Navy Fed CD #1 Matures 5/17/2018	\$0.00
Other Ordinary Income	\$0.00
BOA Checking Account	\$0.00
BOA Interest Maximizer Savings	\$0.00
Pentagon Federal CD's when converted into High Yield Savings	\$0.00
<b>Total INCOME:</b>	<b>\$248,350.00</b>
<b>CONVENTION EXPENSES</b>	
Awards	\$2,000.00
50th Anniversary Fund	
Convention Expenses	\$1,000.00
President's Outstanding Chapter/Branch Incentive	\$1,500.00
Convention Committee Expenses (Mailing Materials)	\$1,000.00
CPOA National BoD Expenses (includes tvl, per diem, hotel, President	\$8,750.00
Vice-President	
Secretary	
Treasurer	
Regional Advisor: Region 1	
Regional Advisor: Region 2	
Regional Advisor: Region 3	
CGEA National Officer Expenses (includes tvl, per diem, hotel, President	\$5,000.00
Vice-President	
Secretary	
Treasurer	
Executive Director	\$1,500.00
<b>Total Convention Expenses:</b>	<b>\$20,750.00</b>
<b>NATIONAL EXPENSES: CPOA BoD TRAVEL</b>	
National Officers	\$6,500.00
President	
Vice-President	
Secretary	
Treasurer	
Regional Advisor: Region 1	
Regional Advisor: Region 2	
Regional Advisor: Region 3	
<b>NATIONAL EXPENSES: CGEA TRAVEL</b>	<b>\$3,715.00</b>
President	
Vice-President	
Secretary	
Treasurer	
<b>Total CGEA/CPOA Travel:</b>	<b>\$10,215.00</b>
<b>NATIONAL EXPENSES (OPERATIONS)</b>	
Building Repair & Maintenance	\$2,000.00
Office Security System	\$2,400.00
Computer Equip & Software	\$1,500.00
Condo Association Fees	\$3,100.00
Credit Card Processing Fees	\$1,000.00
Membership Processing Expense	\$750.00
Membership: Electronic Communications (Constant Contact)	\$1,500.00
Memorial Fund	\$1,000.00
National CPOA BoD Discretionary	\$1,000.00
National CGEA Officers Discretionary	\$1,000.00
Office Equipment & Furnishings	\$500.00
Office Machine Repair (Includes maintenance contracts)	\$2,400.00
Office Supplies	\$2,000.00
Online Accounting Service (QuickBooks & Payroll)	\$1,000.00
Payroll (Intuit) - merged	\$0.00
Phone and Internet Bundle	\$1,800.00

Coast Guard Chief Petty Officers Association

Account Listing

Account	Budget CY2020
Postage (includes equipment rental)	\$10,000.00
Publications (Off pubs, Roberts Rules, etc)	\$200.00
<b>Employee Pay &amp; Benefits</b>	
Salary (Executive Director)	\$80,000.00
Employee Retirement Account	\$4,655.00
Medical Benefit Re-imbusement Account	\$3,000.00
Wages (Admin Assistant)	\$29,000.00
Execulive Director Local Travel	\$600.00
Stationery & Printing	\$1,500.00
Utilities (gas & elec)	\$1,200.00
Website/Web Manager	\$2,500.00
IRS Penalties & Settlements	
<b>Total National Expenses (Operations):</b>	<b>\$155,605.00</b>

**NATIONAL EXPENSES (TAXES/INSURANCE/LEGAL)**

<b>Business Liability Insurance</b>	
Corporation Costs	\$250.00
County Personal Property Tax	\$250.00
Liability Insurance	\$2,000.00
Professional Accounting Service (Financial Review)	\$0.00
Professional Accounting Fee	\$0.00
Federal Tax Return Preparation	\$1,600.00
Insurance Property	\$1,800.00
Legal Fees	\$2,000.00
Real Estate Tax	\$3,500.00
<b>Total National Expenses (Taxes/Insurance/Legal):</b>	<b>\$11,400.00</b>

**NATIONAL EXPENSES (Start Up Expenses):**

Chapter (Start Up Fund)	\$600.00
Chapter (Start Up expenses)	\$1,000.00
Branches (Start Up Funds)	\$600.00
Branches (Start Up expenses)	\$1,000.00
<b>Total National Expenses (National Office):</b>	<b>\$3,200.00</b>

**NATIONAL EXPENSES (Programs):**

CPO Academy Support (Spirit of the Chief Award)	\$2,000.00
CCCAF Program (Check Presentation to include Walt Gore award)	\$225.00
CPOA Foundation	\$0.00
EPOY Program Dinner	\$1,500.00
Awards (EPOY)	\$800.00
National Election Support	\$0.00
25 year pin	\$0.00
35 & 50 year pins	\$0.00
Membership Pin: Postage	\$0.00
50 Year Coin	\$0.00
Gold Lifetime Award	\$500.00
COMDT National Retiree Council Support	\$400.00
Coast Guard Museum support	\$500.00
CGEA Membership (25 yr pin)	\$0.00
VA Veterans Day Ceremony	\$400.00
<b>Total National Expenses (Programs):</b>	<b>\$6,325.00</b>

Walter Gore Scholarship \$1,000.00

**PUBLICATION EXPENSES (The CHIEF Magazine):**

Postage/Labels/Distribution	\$15,000.00
Printing	\$33,000.00
<b>Total Publications:</b>	<b>\$48,000.00</b>

**Grand Total Expenses:** \$256,495.00

