

LOCAL BRANCH COMMITTEE Standard Operating Procedures

COMMISSIONED OFFICERS ASSOCIATION
OF THE U.S. PUBLIC HEALTH SERVICE



References

COA Governing Documents

- Strategic Plan
- Bylaws

Contents

Article	3
I. PURPOSE	3
II. MISSION	3
III. COMMITTEE RESPONSIBILITIES & ORGANIZATION	3
Section 1. Committee Responsibility	3
Section 2. Structure.....	3
IV. COMMITTEE PROCEDURES	4
Section 1. Responsibilities	4
Section 2. Meetings.....	6
Section 3. Branch Presidents: Attendance and Reporting	6
Appendices.....	8
Appendix A. End-of-the term Certificate of Appreciation (located in OnBoard).....	9
Appendix B. Sample Welcome Letter to New Branch Presidents (issued by COA Membership Coordinator).....	10
Appendix C. New Branch Application Template	12
Appendix D. OBC Graduate/Local Branch Pairing Program Information (Process & Email Template).....	13
Appendix E. Updating and Maintaining the National COA Local Branch Interactive Map..	15
Purpose	15
Location of Files	15
Annual Update of the Local Branch Roster Spreadsheet.....	15
Updating Individual Branch Information Between Annual Updates	16
How to embed the Google My Map	17

Article

I. PURPOSE

The Commissioned Officers Association of United States Public Health Service (COA) Local Branch Committee Standard Operating Procedures (SOP) provides operational and procedural guidance for the COA's Local Branch Committee.

This SOP applies to all documents created that are related to all functions within the COA Local Branch Committee to establish policies, processes, records, and acceptance criteria under the auspices of the COA. This SOP does not apply to documents created by other organizations outside of the COA Local Branch Committee.

II. MISSION

The mission of the Local Branch Committee is to improve the vitality of local COA branches and to strengthen ties between local branches and the National COA. This mission is conducted primarily by facilitating communication and collaboration among local branches and National COA. This committee seeks to create an environment in which all Local Branches understand national level COA issues and communicate them to their members, National COA understands the needs of local branches and responds effectively to them, and local branches are empowered to flourish and be relevant to their members, ultimately to the benefit of the USPHS Commissioned Corps.

III. COMMITTEE RESPONSIBILITIES & ORGANIZATION

Section 1. Committee Responsibility

The Local Branch Committee shall work with the COA Board of Directors and COA staff to facilitate issues and activities of Local Branches.

Section 2. Structure

The Local Branch Committee consists of one Committee Chair, one Vice-Chair, and COA volunteers who are designated as Committee members. The Local Branch Chair may form other permanent or ad-hoc subcommittees within, as needed.

- A. Chair: The Local Branch Committee Chair shall be currently serving on the COA Board of Directors and is to be appointed by the Chair of the COA Board of Directors. The Local Branch Chair acts as a liaison between the COA Board of Directors and the COA Local Branch Committee. The Local Branch Committee Chair and Vice-Chair facilitates, organizes, and maintains order in meetings; advises the Local Branch Committee on new and existing projects; and reviews and finalizes Committee-specific documents. The current Local Branch Committee Chair and Vice-Chair may have input on the selection of the next Local Branch Committee leaders.

- B. Vice Chair: The Local Branch Committee Vice Chair shall be currently serving on the COA Board of Directors and is to be appointed by the Chair of the COA Board of Directors. The Local Branch Vice Chair assists the Committee Chair on any administrative committee work and acts for the Chair in case of deployment or any other leave of absence. The Chair and Vice Chair can divide duties in whatever fashion they agree upon.
- C. Committee Members: The Local Branch Committee is open to any active National COA member. Committee members may be appointed to help complete specific projects or assist with specific tasks. The size of the Local Branch Committee shall be adaptable to meet the Local Branch Committee's mission, as determined by the Local Branch Chair. Committee members should attend meetings regularly and volunteer for committee activities as they arise to be considered active members and to receive a letter of appreciation.
 - i. Recruitment of Committee members: Wide, open call for committee members is conducted using a blast e-mail through COA and the Commissioned Officers Foundation (COF) of the USPHS, Frontline, and via COF Symposium recruitment.

IV. COMMITTEE PROCEDURES

Section 1. Responsibilities

The Local Branch Committee Chair must keep the Committee viable and productive through aligning the meetings and projects to facilitate the mission of the Local Branch Committee. The Local Branch Committee Operational year is from July 1 – June 30.

A. The Local Branch Committee Chair and Vice-Chair will have the following responsibilities, which can be divided between the two as agreed upon:

- i. Prepare written reports (to be included in the minutes) for Committee meetings to communicate project progress and Committee activities. Meeting minutes shall be stored in the Local Branch Google Drive associated with the Local Branch gmail account (nationalcoallocalbranch@gmail.com).
- ii. Prepare written and/or verbal reports for the COA Board of Directors meetings.
- iii. Manage Local Branch Committee gmail account (nationalcoallocalbranch@gmail.com) and respond to inquiries from local branches
- iv. Review Committee SOP and the following Committee documents located on the COA Local Branch Resource page at least annually.
 - a. Local Branch Orientation
 - b. Local Branch Handbook
 - c. Local Branch Bylaws Template
- v. Collaborate with other COA Committees, such as Constitution &

Bylaws, Outreach, and Comms/PR to work on projects and initiatives that benefit the local branches. Provide guidance and input to Awards Committee regarding Local Branch individual and group awards.

- vi. Involve as many Committee members as possible in discussions by soliciting opinions and experiences.
- vii. Ensure Committee members understand expectations for assigned tasks and projects.
- viii. Ensure individual project milestones are met, and if not, identify the cause and rectify the problem.
- ix. Provide orientation to new Committee members to review the mission of the Committee, current projects, time and frequency of meetings, etc.
- x. Maintain accurate records of Committee attendance.
- xi. Prepare End-of-the-term Certificates of Appreciation (see Appendix A) for Committee volunteers
 - The COA National Membership Coordinator issues letters of appointment and letters of appreciation to the Local Branch Presidents
- xii. Chair and Vice Chair will, at least annually, attempt to make contact with any branches that are not attending meetings, to obtain “proof of life,” i.e., proof that the branch is still active, viable, and in existence.
- xiii. Oversee new branch applications/formations (see Appendix C for application template) and branch closures. Bring branch applications and closure recommendations to the COA Board for a vote.
- xiv. Provide oversight to the following tasks (the tasks can be delegated to committee volunteers)
 - Manage, maintain, and regularly update the National COA Local Branch interactive map maintained through Google My Maps in accordance with Appendix E, “Updating and Maintaining the National COA Local Branch Interactive Map. This can be tasked to a committee volunteer.
 - Pair OBC graduates who became new COA members with their nearest local branch to connect them and offer waived local branch membership dues for the remainder of their first operational year (in alignment with National COA waived dues for OBC graduates). See Appendix D for procedure and email template.

- B. The Local Branch Committee Secretary, if appointed, will have the following responsibilities. If a Committee Secretary is not appointed, the Committee Chair or Vice-Chair will assume the following responsibilities:
- i. Schedule and manage meetings (e.g., via Zoom; Google calendar)

- ii. Manage listserv of Branch Presidents and other Branch leadership
 - iii. Distribute agenda to Local Branch Committee members prior to meetings
 - iv. Prepare Local Branch Committee meeting minutes for review and approval by Chair or Vice-Chair.
 - v. Maintain accurate records of Committee attendance in the above-mentioned minutes.
- C. Committee Members have the expected roles and responsibilities:
- i. Be willing and able to give the necessary time to attend meetings and perform any assigned duties.
 - ii. Actively participate in discussion and be willing to listen to and respect others' viewpoints.
 - iii. Think in terms of the welfare of the group rather than personal interests.
 - iv. Accept and follow through on assignments.
 - v. Represent the interests of Local Branches.

Section 2. Meetings

The Local Branch Committee will hold internal planning meetings often as mutually decided upon by the Chair and Vice-Chair. The Local Branch Committee will also hold Local Branch Leadership calls for Branch Presidents (or proxy) each month. Most often, the agenda consists of a welcome message, Executive Director (ED) Report, announcements by Chair or Vice-Chair, and at times, a brief training or presentation relevant to the interests of the members. Examples of meeting subjects include Local Branch Orientation, branch finances, communications and PR strategies, managing local branch bylaws, community service opportunities, presentations by local branches, awards, local branch logos and emails, and other topics as requested by the local branch leaders.

Meeting minutes are stored in the Local Branch Google Drive.

Section 3. Branch Presidents: Attendance and Reporting

Each Local Branch's President or a proxy must attend each monthly Local Branch Leadership meeting. These meetings allow Local Branch Presidents to learn important updates, policies, and guidance from National COA to take back to their local branches; additionally, local branches can ask questions to National COA. Attendance at the monthly meetings serves as "proof of life" of a branch and will be taken into consideration for annual Local Branch awards.

Near the end of each operational year (typically May or June), the Local Branch Committee will release the Annual Branch Updates Form (created in collaboration with the National COA Membership Coordinator). This is typically in Survey Monkey or a similar platform. Branch Presidents must complete the Annual Branch Updates Form after the completion of their Local Branch elections.

Appendices

Appendix A. End-of-the term Certificate of Appreciation

Appendix B. Sample Welcome Letter to New Branch Presidents

Appendix C. New Branch Application Template

Appendix D. OBC Graduate/Local Branch Pairing Program Information (Process & Email Template)

Appendix E. Updating and Maintaining the National COA Local Branch Interactive Map

Appendix B. Sample Welcome Letter to New Branch Presidents (issued by COA Membership Coordinator)



Date

Name

Address

City State Zip

Dear [Name],

Congratulations on your election as President of the **Branch Name** Branch. You have taken on significant responsibility, and your desire to commit to COA in advancing the goals of the Association on the local level is appreciated.

We look forward to working with you and your fellow officers, and we encourage you to contact the National office whenever you need assistance. We strongly believe in the importance of nurturing the COA through the Local Branches, especially since involvement through a Local Branch is the best and often only way an officer can get involved in COA. We continually tout "belonging" as one of the main benefits of the Association, and Local Branches fill that need.

Some materials that will help you organize your leadership efforts are listed below and are available on the COA website, www.coausphs.org, *Local Branches*.

In the capacity as Branch President, it is **vital to familiarize yourself with these important resources which assist in numerous areas:**

- **Recruitment Material.** You can refer prospective members to COA's website to join on-line at <https://www.coausphs.org/COA/COA/Join/Join-Landing.aspx?hkey=050c7c5d-a372-46a4-99ef-2bd7fe20ff2d>.
- **Branch Support Material.** The COA Branch Handbook, used for guidance and assistance, is available on our website at: <https://www.coausphs.org/common/Uploaded%20files/Local%20Branches/Updates%20to%20Local%20Branch%20Page/Local%20Branch%20Handbook%20Sept%202022.pdf>

When new elections are held or there is a change in branch officers, National COA must be notified immediately. Please submit the **required** Branch Officer Update form available at <https://www.surveymonkey.com/r/9W63JC9>

- **Branch Rosters.** Branch Presidents may obtain branch member lists for both current and inactive members of their Local Branch by emailing Donna Sparrow at dsparrow@coausphs.org. This information can serve as an excellent tool for recruitment and retention efforts.
- **Local Branch Dues.** For Local Branches charging local dues, the appropriate branch officer may contact COA's Director of Administration, Erica Robinson, at erobinson@coausphs.org to request dues disbursements.

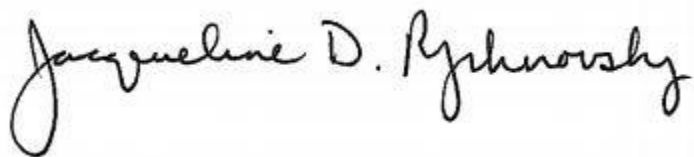
From time-to-time COA may ask for the views from the Branch President and Branch members regarding specific issues and areas of concern or interest. We may also ask for your assistance in contacting members, as we typically do for arrears notification. Personal contact through e-mail has proven to be one of the most effective ways to contact members of COA.

We encourage you to get to know the COA Local Branch Committee members of COA's Board of Directors. This committee Chair is **LCDR Rachel Forche (rforche@umich.edu)** and the committee Vice Chair is **CDR Lashley Hatch (Lashleyhatch@gmail.com)**. They are available to assist you with any issues or questions that arise during your tenure. Please make sure you become aware of their bi-monthly Local Branch Meetings, and if you are unable to attend, we ask that you send a representative.

We want to focus on recruitment and retention for the entire year, and for this we look to the Local Branches for your energy and initiatives. **Engaging members locally is the most effective way to get them and keep them, and the success of COA depends on the strength of its membership. Local Branches which are actively involved reinforce continuous strength. Please utilize all of the above-referenced Local Branch resources to assist in reaching your Branch's full potential!**

Again, please accept our warmest wishes for your term in office. Don't hesitate to contact COA when we can lend a hand. Best of luck!

Sincerely,



Jacqueline Rychnovsky, PhD, CAE
Captain, USN (Retired)
Executive Director

Appendix C. New Branch Application Template



Proposed New Local Branch ***Name of Branch***

Location:

Executive members:

Position	President	VP	Secretary	Treasurer
Name				
Dues Paid				

Additional members:

Name	Dues Paid

Bylaws Template completed:

Situation:

Sustainability:

Goals:

Plans and Activities:

Appendix D. OBC Graduate/Local Branch Pairing Program Information (Process & Email Template)

OBC Graduate/Local Branch Pairing Program – Process

The National COA Local Branch Committee Chair, Vice Chair, or Volunteer will reach out to COA Membership Coordinator following each OBC class to receive list of OBC graduates who have signed up for National COA membership. Using the interactive Local Branch map, COA Local Branch Chair/Vice Chair/or designated Volunteer will determine the nearest branch for each OBC graduate/new COA member and send an email to the new graduate, the local branch president, and the local branch gmail to connect them and inform the new graduate of the waived dues. See email template below.

OBC Graduate/Local Branch Pairing Program - Email Template

To: [Recent OBC graduate who joined National COA]

Cc: [National COA Local Branch Email (nationalcoalocalbranch@gmail.com)]; [Local Branch President Email]; [Local Branch General Email Address]

Subject: Welcome to USPHS – Connecting You with Your Local Commissioned Officer Association Branch

Dear [Rank Last Name],

Congratulations on your commissioning as a United States Public Health Service officer! We are excited to welcome you to this prestigious organization, where your dedication to public health will undoubtedly make a significant impact.

To support you in your new role, we want to introduce you to your local Commissioned Officers Association (COA) branch. The COA is an invaluable resource that provides opportunities for networking, professional development, mentorship, and camaraderie among fellow officers. Engaging with your local COA branch will help you stay connected, informed, and supported throughout your career.

Your closest COA branch is the [Local Branch Name] branch. The primary point of contact is:

Local COA Branch President: [Rank First Last]

Email: [Official Email Address]; [Alternate Email Address]

We have cc'd your local branch representative on this email.

We encourage you to reach out and get involved in upcoming events and activities. The COA community is here to help you navigate the unique challenges and opportunities of service within the USPHS Commissioned Corps.

[Optional Dues Waiver Paragraph]

As a recent OBC graduate, the National COA and local [Branch Name] branch will waive your local branch dues for the remainder of the operational year (through [Month Year]). To become a member of the [Branch Name] branch, please contact both the branch President and the COA Membership Coordinator, [Coordinator Name], at [Coordinator Email]. The Membership Coordinator will officially affiliate you with the branch.

Once again, welcome to the USPHS family. We look forward to witnessing your contributions to the health and well-being of our nation. If you have any questions or need further assistance, please feel free to contact us.

Best regards,

[Your Name], [Rank], USPHS

National COA Local Branch Committee

Appendix E. Updating and Maintaining the National COA Local Branch Interactive Map

Purpose

This procedure outlines the process for annually updating and maintaining the National COA Local Branch interactive map embedded on the COA website and maintained through Google My Maps.

Location of Files

All map-related files and templates are located within the Local Branch Google Drive associated with the Local Branch gmail account (nationalcoallocalbranch@gmail.com).

The map related files are found in the Google drive “MyMaps” folder

Annual Update of the Local Branch Roster Spreadsheet

Updated Local Branch information is obtained from the annual COA Annual Branch Updates survey. Coordinate with National COA leadership to obtain the finalized updated branch roster information each operational year.

Step 1: Create a New Working Copy

1. Open the Local Branch Google Drive.
2. Navigate to the MyMaps folder.
3. Locate the file titled: “Template_MyMap: Local Branch Roster 20XX-20XX”
4. Make a copy of the template file for the new operational year.
5. Rename the copied file to reflect the new operational year.
 1. Example:
 1. Template_MyMap: Local Branch Roster 2026-2027
 2. Do not edit the original template file directly.
6. Update the new spreadsheet with the Local Branch information obtained from the COA Annual Branch Updates survey.
 1. The spreadsheet contains the following categories/columns:
 2. Local Branch
 3. Latitude
 4. Longitude
 5. Coordinates Location (used for Lat & Long)
 6. Geographic Area
 7. States Included
 8. Branch and/or President Contact Info
 9. Branch President (20XX-20XX)
 10. Branch Dues
 11. Branch Website
 12. Branch Social Media
7. Save the finalized spreadsheet within the MyMaps folder.

Step 2: Updating The Existing Google My Map

1. Open Google My Maps: <https://www.google.com/mymaps>
2. Sign in using the Local Branch Google account.
3. Open the National COA Local Branch map currently embedded on the COA webpage.
4. Select the current map title.
5. Update the title to reflect the current operational year.

1. Example: 2026-2027 COA Local Branches

Step 3: Remove the Previous Year's Layer

1. Locate the existing layer containing the previous operational year's Local Branch roster.
2. Click the three-dot menu next to the layer name.
3. Select: "Delete this layer"
 1. Ensure only the outdated yearly layer is removed and not the entire map.

Step 4: Import the Updated Spreadsheet

1. Select: "Add Layer"
2. Name the new layer to reflect the current operational year.
 1. Example: 2026-2027 Local Branch Roster
3. Within the new layer, select: "Import"
4. Upload the updated spreadsheet from the MyMaps folder.
5. After uploading the spreadsheet:
 1. First pop up: Choose columns to position your placemarks
 1. Check the following boxes:
 1. Latitude
 2. Longitude
 2. Click continue
 2. A second pop-up window titled: "Choose a column to title your markers"
 1. Check the following box:
 1. Local Branch
 2. Click finish
7. Google My Maps will generate the updated branch locations.

Step 5: Review Import Errors

After the import is completed, a notification box may appear stating: "X rows couldn't be shown on the map. Fix errors..."

1. Select: "Open data table"
2. Review rows identified with errors.
3. Typically, these are branches with incomplete or missing information.
4. Confirm whether the branch is inactive or no longer operational.
5. If confirmed inactive, the row may be deleted from the map layer.

Updating Individual Branch Information Between Annual Updates

If a Local Branch has updated information between annual roster updates (e.g., new Branch President, updated contact information, website changes, etc.), the information should be updated in both the master spreadsheet and the Google My Maps layer.

The spreadsheet and Google My Maps layer do not automatically sync with one another. Updating one does not update the other. Both must be updated separately to maintain consistency.

Option 1: Full Re-import Method

This method is recommended when multiple branches require updates.

Step 1: Update the Master Spreadsheet

1. Open the current operational year spreadsheet located in the MyMaps folder.
2. Update the applicable Local Branch information.
3. Save the spreadsheet.

Step 2: Re-import the Updated Spreadsheet

1. Open the existing Google My Map.
2. Delete the current operational year layer.
3. Add a new layer.
4. Import the updated spreadsheet following the import procedures outlined above.

Option 2: Manual Google My Maps Table Update

This method is recommended for small edits or single-branch updates.

Step 1: Update the Master Spreadsheet

1. Open the current operational year spreadsheet located in the MyMaps folder.
2. Update the applicable Local Branch information.
3. Save the spreadsheet.

Step 2: Update the Google My Maps Layer

1. Open the existing Google My Map.
2. Locate the current operational year layer.
3. Click the three-dot menu next to the layer name.
4. Select: "Open data table"
5. Locate the applicable Local Branch row.
6. Manually update the information directly within the Google My Maps table.

How to embed the Google My Map

The procedures outlined above update the existing Google My Map currently embedded on the COA website. As long as the same Google My Map is maintained and updated, no additional website updates or embed code changes are required.

If the map needs to be embedded on a new webpage or website, follow the steps below.

Step 1: Obtain the Embed Code

1. Open the Google My Map.
2. Click the three-dot menu next to the map title.
3. Select: Embed on my site
4. Copy the HTML embed code provided by Google My Maps.
 1. Example: `<iframe src="..."></iframe>`

Step 2: Coordinate Website Update

1. Provide the embed code to the National COA webmaster.
2. Coordinate with the National COA webmaster, who has editing privileges to the COA website, to add or update the embedded map code on the applicable webpage.
3. After the embed code has been added, verify that:
 - a. The map displays correctly
 - b. The correct operational year appears
 - c. The updated Local Branch information is visible
 - d. Map navigation and functionality are operational