

**United States Coast Guard Auxiliary**

**NATIONAL BOARD  
and  
NATIONAL STAFF**



**STANDING OPERATING  
PROCEDURES  
2011**



**THE NATIONAL COMMODORE  
OF THE UNITED STATES COAST GUARD AUXILIARY**

**James E. Vass, Jr.**

December 1, 2011



From: Commodore James E. Vass, Jr.  
To: Distribution

Subj: NATIONAL BOARD AND NATIONAL STAFF STANDING OPERATING PROCEDURES

1. This guide provides information and guidance for members of the National Board and the National Staff. It covers procedural requirements, actions to be taken and reports required.
2. All changes approved as of November 1, 2011, are included in this revision of the guide. All previous editions are superseded. This revision will assist members in the performance of their duties. All addressees will read and become familiar with the contents of this document. All Board and Staff members must be appropriately briefed on this document as they assume their new office. While circumstances may require deviation from some of these procedures, it is my intent to keep any such deviations to a bare minimum.
3. Contents, corrections, and suggestions for additional subjects are welcome and should be submitted to the Vice National Commodore.

James E. Vass, Jr. / s /

James E. Vass, Jr.  
National Commodore

Dist: National Board Members  
National Staff  
CG-542



***Dependability***



***Integrity***



***Diversity***

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## **Section 1 – NATIONAL ORGANIZATIONAL ENTITIES**

### **1. National Executive Committee (NEXCOM) - NEXCOM consists of eight (8) members:**

- A. The National Commodore (NACO)
- B. The Vice National Commodore (VNACO)
- C. The four (4) Deputy National Commodores:
  - i. DNACO-Atlantic (E)
  - ii. DNACO-Atlantic (W)
  - iii. DNACO-Pacific
  - iv. DNACO-ITP
- D. The Immediate Past National Commodore (NIPCO)
- E. The Chief Director of Auxiliary (CHDIRAUX)

### **2. National Board - The National Board consists of twenty-five (25) members:**

- A. The eight (8) NEXCOM members
- B. The sixteen (16) District Commodores
- C. The President of the National Association of Commodores (NAC)

### **3. National Staff Operating Committee (OPCOM) – OPCOM consists of twenty-nine (29) members:**

- A. Eight (8) NEXCOM members listed above
- B. National Executive Staff, which consists of the seven (7) Assistant National Commodores (ANACO-) [CC, DV, FC, IT, PP, RB, and RP]
- C. Fourteen (14) Department Directors (DIR-) [A, B, C, D, E, H, I, M, P, Q, R, S, T, U, and V]
- D. The National Executive Assistant (N-EA) and representatives from CG-5 are technical advisors to the OPCOM
- E. The Executive Director of the Coast Guard Auxiliary Association, Inc., is normally invited to participate in OPCOM meetings

## **Section 2 – COMMITTEE PROCEDURES**

### **1. National Executive Committee (NEXCOM)**

#### **A. Meetings**

- i. November NEXCOM Meeting - Each newly elected NACO's watch begins with a NEXCOM meeting in Washington, D.C., in conjunction with an official swearing in ceremony at Coast Guard Headquarters on or about 1 November. The National Executive Staff may be invited to attend.
- ii. National Training Meeting (N-TRAIN) - N-TRAIN, normally held annually during the last week of January, includes NEXCOM and OPCOM meetings. The Executive Director of the Coast Guard Auxiliary Association, Inc. is normally invited to attend the NEXCOM meeting.
- iii. Spring NEXCOM Meeting - A NEXCOM meeting is normally scheduled in the April-June time frame each year. The Executive Director of the Coast Guard Auxiliary Association, Inc., is normally invited to attend. The National Executive Staff may be invited to attend.
- iv. National Convention (NACON) - NACON, normally held annually during the last week of August or the first week of September, includes NEXCOM and OPCOM meetings.

#### **B. Meeting Procedures**

- i. Conduct of the NEXCOM meetings - NEXCOM meetings use a relaxed atmosphere conducive to free and open discussion of current events as well as policy matters. The discussion content should be considered CONFIDENTIAL and shall remain within the confines of the NEXCOM. Uniforms are normally not required. N-EA, N-C, N-D, and ANACO-CC are usually present for NEXCOM meetings. These are closed meetings for attendance only by members of the NEXCOM and those specifically invited by NACO.
- ii. Agenda Items - Participants submit topics to N-EA to include in the NEXCOM meeting agenda at least two weeks in advance of the meeting. Discussion topics are normally one-line items but may be more descriptive if desired. N-EA distributes the agenda with any reference material to the participants about one week prior to the meeting. Last minute topics may be introduced at the meeting; however, other participants should be notified ahead of time to allow thoughtful discussion. If handouts are to be distributed, the originator is responsible for providing the necessary copies (15 for a NEXCOM meeting) before arrival and providing them to N-EA for distribution.
- iii. Meeting minutes - There is no verbatim keeping of minutes even though recording of the discussions at these meetings may occur. A condensed summary (notes) of the deliberations is prepared by N-EA after each NEXCOM meeting. Each member receives a copy of the summary along with a list of "Action Items" within three weeks after the meeting. The "Action Items" serve as a reminder or a work list of tasks for the various members to accomplish and report accordingly. Decisions Reached and Unresolved Issues, which are excerpts from the "Action Items" are provided to the NEXCOM members.

- C. Protocol** - The normal head table seating precedence for the NEXCOM at all National functions is NACO, CHDIRAUX, VNACO, NIPCO and DNACOs. ANACOs, along with other Headquarters representatives, usually will not be seated at the head table. They will, however, be afforded special seating.

## 2. National Board

### A. Meetings

- i. National Area Planning Meetings/Flag Meetings - In the April/May and/or October/November time frames, the DNACOs host a meeting with their respective DCOs and DIRAUXs. The DNACOs are responsible for all arrangements to include development of the NAPM agenda and selecting and contracting (a CGAuxA contract) the hotel. NACO (or VNACO) and the CHDIRAUX (or representative) usually attend.
  - a. At NACO's discretion, the NAPMs may be combined into an Auxiliary Flag Meeting with the NEXCOM, DCOs, DCOSs, and Directors invited to attend. NACO may invite other persons to attend as well.
  - b. Planning for the Auxiliary Flag Meeting will also be the responsibility of the DNACOs with VNACO being the host. The NAPM and Auxiliary Flag Meeting provide an opportunity for face-to-face exchange of information among the District and National Auxiliary leadership.
  - c. Attendance at the NAPM by Coast Guard personnel is by invitation of the DNACOs with the purpose of observing and providing Coast Guard input when requested during the meeting.
- ii. National Training Meeting (N-TRAIN) - N-TRAIN is a training weekend for selected District Staff Officers normally held in the last week of January.
  - a. DSOs to attend N-TRAIN are normally selected by NEXCOM at the previous Spring NEXCOM meeting and confirmed at NACON.
  - b. In addition to the DSO training sessions, there are normally a NEXCOM meeting, National Board meeting, and an OPCOM meeting.
  - c. N-TRAIN may also include DNACO Area meetings with their respective DCOs as well as DNACO meetings with the ANACOs and DIRs who report to them.
  - d. CHDIRAUX normally holds meetings and training for DIRAUXs at N-TRAIN.
  - e. It is the responsibility of the District leaders and DSOs in attendance to share the information gained at N-TRAIN with their district membership. Attendance is expected at all required meetings in order to receive full reimbursement authorized by travel orders.
- iii. National Convention (NACON) - NACON, like N-TRAIN, is a series of separate and distinct meetings. The purpose of NACON is sharing of information, training, input, and a forum for biennial national elections.

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- a. The meetings include:
  - (1) NEXCOM Meeting
  - (2) OPCOM Meeting
  - (3) DNACO Area Meetings with their DCOs
  - (4) DNACO staff meetings with their ANACOs and DIRs
  - (5) National Board Committee-of-the-Whole Meeting
  - (6) National Board Meeting
  - (7) Department meetings, committee meetings, and Department-sponsored training sessions may also be scheduled.
- b. Social events are scheduled to promote fellowship among attendees.
- c. It is the responsibility of the District leaders and DSOs in attendance to share the information gained at NACON with their district membership. Attendance is expected at all required meetings in order to receive full reimbursement authorized by travel orders.

**B. Reports**

- i. Quarterly Report to NACO. DNACOs should ensure that they receive quarterly reports from their respective DCOs and ANACOs in accordance with the following schedule. The DNACOs should consolidate the reports under one cover letter with their comments and forward to NACO with copies to VNACO and CHDIRAUX not later than the dates listed below. NACO will forward as appropriate.
  - a. 1<sup>st</sup> Quarter - Not later than 15 April
  - b. 2<sup>nd</sup> Quarter - Not later than 15 July
  - c. 3<sup>rd</sup> Quarter - Not later than 15 October
  - d. 4<sup>th</sup> Quarter - Not later than 15 January
- ii. The Quarterly Report to NACO is directed specifically to NACO and should be a “report card” indicating how the National strategic imperatives are being implemented, accomplishments against strategic plans, district/region best practices, successes, and areas of concern. It provides a vehicle for the Districts and National staff to formalize how they are progressing towards attaining the National Goals.
- iii. The Quarterly Report to NACO provides NACO with a picture of what is currently going on throughout the country in each district/region and each staff department. It should identify areas of success and areas of specific concern that may require greater focus by NACO and the senior leaders of the Auxiliary. Likewise, it provides a measurement that allows NACO to determine whether to stay the course or to make appropriate course corrections.
- iv. Report content - All written reports should include information regarding:
  - a. Current progress relative to Auxiliary Business Plans, District Strategic and Tactical Plans, and Contingency Plans
  - b. Accomplishments in Recruiting and Retention
  - c. Program performance (Narrative, not AUXDATA information)
  - d. Problems (known or potential) and suggested solutions

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- e. Action items
  - f. Assistance needed from the Coast Guard, NEXCOM and National staff
  - g. Future plans and milestones
- v. Special Reports - Each year Districts will be asked to update their Strategic/Tactical Plans and Contingency Plans and submit to their respective DNACOs by 1 April.

### **3. National Staff**

#### **A. Job Descriptions**

- i. Each DIR is responsible for maintaining a current job description and organizational chart on the Department website. Additionally, a current organizational chart will be maintained in AuxOfficer.
- ii. Job descriptions include the following elements:
  - a. Position title with acronym
  - b. Directorate in which the position is assigned
  - c. Reports to (Position to which this position directly reports)
  - d. Overall responsibility (Overarching reasons the position exists on the staff)
  - e. Key areas of responsibility
    - (1) Specific items that are expected to be routinely accomplished, as well as a sense of priorities and goals for the future
    - (2) Job descriptions, particularly for senior managers, should include latitude to exhibit initiative and develop long-term improvements in the organization and its processes
  - f. Interfaces with (Positions with which the incumbent works on a regular basis)
  - g. Qualifications (Necessary skills, traits and experience required to be successful in the position)
- iii. Job descriptions can be used for multiple purposes:
  - a. Advertising the position
  - b. Setting expectations with the incumbent
  - c. Communicating to others the function of the position
- iv. The chain of leadership must approve all newly proposed staff positions and organizational changes.
- v. The Director (DIR) will send the newly proposed job description(s) along with an updated organizational chart for approval to the ANACO, who will then send to the DNACO and on to VNACO.
- vi. If approved, VNACO will email approval to the DNACO copying the ANACO and DIR.
- vii. The Director may then fill the position(s).

#### **B. Review of National Staff**

- i. All National Staff serves at the pleasure of NACO as provided in the Auxiliary Manual.
- ii. No later than 1 September of each year, the DIR will review the staff positions and personnel assignments to determine if changes are needed.

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- iii. The DIR will poll each department position to determine if the person is willing to serve another year in the current position.
- iv. The DIR will provide a list of all suggested staff position changes to the ANACO by 1 October with verification that the persons assigned to the other staff positions are performing satisfactorily and wish to remain in their assigned staff position for an additional year.
- v. The ANACO will send this information up the chain of leadership.
- vi. Any staff assignment changes will require the appropriate paperwork according to the National Staff Appointment Procedure in item C below.

**C. National Staff Appointment Procedure**

- i. Only the following will need to be involved in the Staff Appointment Process:
  - a. New to National Staff
  - b. Those making internal job changes
  - c. Branch Chief becomes Division Chief
  - d. DIR becomes ANACO, etc
- ii. If a staff member is remaining in the position he/she held previously, there is no need to resubmit paperwork. The DIR may report to ANACO that all request to remain in current positions.
- iii. There will be two procedures:
  - a. For Deputy DIRs, DVCs, BCs, BAs
  - b. For DIRs and above
- iv. Procedure for New to National Staff for Deputy DIRs, Division Chiefs, Branch Chiefs, Branch Assistants
  - a. DIRs will receive from the applicant the following:
    - (1) National Staff Application, ANSC 7062 (may be electronic)
    - (2) Resume (may be electronic)
    - (3) Notarized Assignment of Copyrights – Auxiliary, ANSC 7063 (must have original paper copy with notary seal)
    - (4) Notarized Assignment of Copyright – CGAuxA, Inc CGAUXA-7 (must have original paper copy with notary seal)
  - b. The DIR will scan or photocopy the two copyright forms and save in his/her personnel files using the preferred method of retaining files. Retain the two original 7063 and CGAuxA-7 until notified that the applicant has been approved and has been processed by N-EA. (Final procedure is in step a-l).
  - c. DIR will retain original ANSC 7062 and resume.
  - d. DIR will contact the applicant's District Commodore informing him/her of National Staff pending application and request comments by DCO (required). The results of that

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contact, including no response, is to be documented on the form.

- e. Once the DCO responds, the process will be as follows:
- (1) Update the organizational chart and electronically send to N-EA
  - (2) Complete the form ANSC 7061 and electronically sign (if the DIR cannot sign electronically, the ANACO may sign electronically on behalf of DIR)
  - (3) Send the 7061, copies of 7062 and resume to ANACO for concurrence
  - (4) ANACO will check the form for completeness, electronically sign and send the 7061, 7062 and resume to DNACO (if the form is incomplete, return it to DIR to be properly completed)
  - (5) DNACO will electronically sign and send the package to VNACO
  - (6) Upon concurrence, VNACO will electronically sign and send only the 7061 to N-EA. Remaining documents are maintained by the VNACO.
  - (7) N-EA will sign electronically and send to AUXDATA representative for entry
  - (8) The AUXDATA representative will enter and send an email when entry is completed
  - (9) N-EA will retain a copy of 7061 for his/her files
  - (10) N-EA will send the completely signed 7061 to the DNACO Aide, who will prepare the Letter of Welcome (LoW) and the Certificate of Appointment (CoA) to send to the applicant using the date specified on the 7061. DNACO Aide will send the 7061 to the DIR (cc ANACO and DNACO) noting date of mailing for the LoW and CoA
  - (11) DIR will retain 7061 with the rest of the applicant's paperwork
  - (12) DIR will mail the original two copyright forms to:

Executive Director  
Coast Guard Auxiliary Association, Inc.  
9449 Watson Industrial Park  
St. Louis, MO 63126-1522

- v. Procedure for Internal Job Changes
- a. Only the new 7061 form needs to be processed using steps 3.C.iv.e.(1-11)
  - b. DCOs do not need to be contacted
  - c. New copyright Assignments are not needed
- vi. Organizational Charts
- a. When updating the organizational chart, change the date in the header
  - b. With several job changes or new applicants, send only one organizational chart reflecting all the changes to N-EA

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- c. DIR will post the organizational chart on the department website after receipt of completed 7061 from DNACO Aide
- vii. For ANACO Processing DIRs
- a. For new DIRs, who have not been a part of National Staff previously, the ANACO needs to follow the same steps 3.C.iv.e including the 7061, 7062, and resume. However, VNACO will confer with the NACO prior to electronic signature. NACO will obtain CHDIRAUX concurrence and notify VNACO. VNACO then sends to N-EA.
  - b. For DIRs, who have previously been on National Staff, send only the 7061 up the chain. VNACO still must confer with NACO, and NACO still must obtain CHDIRAUX concurrence.
  - c. ANACOs will have to sign twice – first in the submitted box and again in the ANACO box.

## **Section 3 – MANUAL AND PUBLICATION REVIEW POLICY**

1. **General** - The following procedure will be followed to ensure a complete and thorough review of all manuals and publications produced and/or revised. Changes in one manual or publication may impact several other existing documents. For example, a change in the Auxiliary Manual impacts the New Member Course and the Administrative Procedures Course. In order to keep all U.S. Coast Guard manuals for the Auxiliary and other publications correct and current, all changes or revisions need a thorough review and coordination prior to approval. The originator of the proposal is responsible for clearly stating and justifying why a change is needed.

### **2. Procedures**

#### **A. Commandant Instructions, Publications, and Qualification Guides**

- i. Someone identifies that change needs to be made.
- ii. Department or Program area that is responsible for the Instruction, Publication, or Qualification Guide is identified. NEXCOM is made aware through routine reports that action is planned.
- iii. Department or Program area assigns a project officer to identify content that needs changing, and to identify people to make changes.
- iv. Work begins; changes are made. Then, they are shared with any stakeholders at National and/or District level. Milestone progress is reported in routine reports.
- v. Once work is completed, it is sent to the Director and Deputy Director. DIR sends to ANACO.
- vi. ANACO sends to NEXCOM. After NEXCOM concurrence, ANACO sends to CGHQ for concurrence and promulgation.
- vii. Any content that is incorrect is corrected and sent back through all stakeholders for review.
- viii. Once content and revisions are made, headquarters provides a number if it is an Instruction, or Publication, and appropriate people sign the document. (CG Personnel)
- ix. Once document is signed it is published and shared.
- x. Master copy should be given to CGHQ and ANSC.

#### **B. Specialty Course Publications**

- i. Changes are made by Departments responsible for the course.
- ii. Everyone in the Division is responsible for rewrite or edits and makes/ discusses changes. Milestone progress is reported in routine reports.
- iii. When changes are complete, the DVC sends them to the Director and Deputy Director.
- iv. DIR sends to the ANACO and DNACO, who share with NEXCOM for concurrence.

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- v. Following NEXCOM concurrence, DIR sends documents to CHIDIRAUX Office for review.
  - vi. CHIDIRAUX Office sends comments and suggestions for changes back to the Director, who sends them to the Division for edits.
  - vii. If additional edits are made, new copies on CD's are burned and distributed to ANACO, DNACO, NEXCOM, and CHIDIRAUX Office.
  - viii. Once document is approved by CHIDIRAUX Office and NEXCOM, the Division develops the final document, turns it into PDF, and sends to ANSC. CHIDIRAUX Office gets a final copy for their office.
  - ix. CHIDIRAUX Office should have a copy of all training materials and documents.
  - x. Once Specialty Course is completed the DIR-T notifies the DSO-MT's and asks them to Beta test material and provide input and suggestions. Errors are corrected and test questions revised etc.
  - xi. After publication if an error is found and brought to the proponent Department's attention, an error report is sent forward to CHIDIRAUX Office and an errata sheet is made noting the change.
- 3. Review/Rationale** - The reviewer shall provide the reason and/or rationale for each comment submitted. Each reviewer is responsible for clearly stating and justifying why a change is needed. Comments should not be made in the form of questions (e.g., "why is this here?"). Clearly state the problem and offer a suggested revision if appropriate. This is especially important when identifying a comment as major. Comments submitted during the review will be provided in three categories as follows:
- A. Major Comments - These are significant errors, omissions, or procedures that, if adopted, will adversely impact the Auxiliary and/or its members. Additionally, these may be changes that are not in accordance with existing U.S. Coast Guard and/or Auxiliary policy or that contradict other existing manuals or publications.
  - B. Suggested Improvements - These are major clarifications and suggested improvements addressing items from a judgmental, experiential, and/or impact assessment on member morale, acceptance, and financial cost. These comments serve to ensure the policies and/or procedures enhance the purpose, quality, professionalism, member support, and participation in Auxiliary programs.
  - C. Editorial Comments - These are minor comments addressing items from an opinion basis or items of grammatical errors, clarity, etc. While these are minor, they are most important in ensuring the publication is professionally done and clearly communicates its contents to the Auxiliary and U.S. Coast Guard.

## **Section 4 – PROCEDURES FOR NATIONAL POLICY CHANGES**

### **1. Recommendations Submitted by District Board**

- A. Recommendations made by District Boards must have been voted on and approved by the District Board in accordance with their District Standing Rules. These recommendations may have originated at Flotilla, Division, or District level.
- B. Recommendations approved by a District Board must be received by the appropriate DNACO at least 30 days prior to the first day of the National Area Planning Meeting.
- C. The DNACO forwards copies of all such recommendations to each DCO within the Area at least ten days prior to the first day of the National Area Planning Meeting. Copies will be sent by the DNACO to the NEXCOM, ANACO-CC, and N-EA.
- D. All recommendations must be submitted on the approved form (CGAuxA-6) published on the National Forms Directory.
- E. Recommendations approved at the National Area Planning Meetings will be forwarded by the DNACO to VNACO, with a copy to N-EA at least 30 days prior to the first day of the National Meeting held during N-TRAIN or NACON, as appropriate, to be voted on with any other recommendations properly submitted. VNACO will distribute to all Board members and ANACO-CC at least 20 days before the National Board Meeting.
- F. A record of all recommendations approved by the National Board will be maintained by the N-EA.

### **2. Recommendations by other than District Board**

- A. Recommendations on the approved form (CGAuxA-6) may be submitted directly to VNACO at least 30 days prior to the first day of a National Board Meeting by:
  - i. Any voting member of the National Board
  - ii. DNACOs, ANACOs, any National Committee, or NAC provided the recommendation is submitted through VNACO and approved by the NEXCOM
- B. VNACO will forward copies of all such recommendations to each member of the National Board, ANACO-CC, and N-EA at least 20 days before the National Board Meeting.
- C. All recommendations submitted to the National Board from any source will be voted on at the National Board meeting held during N-TRAIN or NACON.
- D. A record of all recommendations approved by the National Board will be maintained by the N-EA.

### **3. Recommendations Pertaining to CGAUXA Matters**

- A. Recommendations pertaining to CGAuxA matters will be submitted and voted on in the same manner described in the above paragraphs except that the final vote will be that of the Board of Directors of the Coast Guard Auxiliary Association, Inc., rather than the National Board of the

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- B. The proposed recommendation will be forwarded by VNACO to the President of CG Auxiliary Association, Inc. at least 30 days prior to the next scheduled meeting of the CG Auxiliary Association, Inc., Board of Directors.

## Section 5 – NATIONAL TRAVEL

### 1. Travel Process – CGAuxA, Inc. Funded

- A. **Purpose** - To describe policies and procedures for requesting, authorizing, and issuing travel orders to Auxiliary/Association members for authorized travel funded by the Coast Guard Auxiliary Association, Inc. (CGAuxA).
- B. **Scope** - Provisions apply to all members of the U. S. Coast Guard Auxiliary/CGAuxA for official travel as authorized in the annual budget approved by the Board of Directors of CGAuxA.
- C. **Process**
  - i. **National Staff Department Travel**
    - a. All department staff travel requests will be submitted to the Director (DIR), who will determine if the travel is required and whether it is within the department's approved budget or whether it should be submitted to the U. S. Coast Guard for orders issuance (see item 2 below for USCG procedures).
    - b. If the Director (DIR) determines the requested travel is required and within the department approved budget amount, the Director will submit the Orders Request – Travel Plan spreadsheet, to the Coast Guard Auxiliary Center (AUXCEN) Travel Section for preparation of CGAuxA funded orders.
    - c. If the department's approved budget amount does not include the proposed travel, then the Director (DIR) will forward the request to his/her Assistant National Commodore (ANACO) for consideration by the appropriate level within the chain of responsibility (ANACO, DNACO, VNACO, or NACO).
    - d. If approved by the appropriate level within the chain of responsibility, then the approving officer will forward the spreadsheet to the AUXCEN Travel Section for preparation of CGAuxA funded orders.
    - e. The AUXCEN Travel Section prepares the orders form and submits it to the Association's Executive Director for review and signature. The Executive Director signs as approving official for expenditures authorized in the approved budget.
    - f. Approved/signed orders will be distributed electronically by the AUXCEN Travel Section directly to the individual(s) listed on the orders.
  - ii. **National Staff Non-Departmental Travel**
    - h. All non-departmental National Staff Senior Officers (N-C, N-D, N-EA, etc.) staff travel requests will determine if the travel is required, if it is within their staff element's approved budget, or whether it should be submitted to the U. S. Coast Guard for orders issuance (see item 2 below for USCG procedures).
    - i. If they determine the requested travel is within the approved budget, they will submit the Orders Request – Travel Plan spreadsheet to the Coast Guard Auxiliary Center (AUXCEN) Travel Section for preparation of CGAuxA funded orders.

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- j. If the approved budget does not include the proposed travel, then the requester will submit the request to the VNACO, who will consult with the NACO on whether to approve the request.
- k. If approved by VNACO or NACO, then the approving officer will forward the spreadsheet to the AUXCEN Travel Section for preparation of CGAuxA funded orders.
- l. The AUXCEN Travel Section prepares the orders form and submits it to the Association's Executive Director for review and signature. The Executive Director signs as approving official for expenditures authorized in the approved budget.
- m. Approved/signed orders will be distributed electronically by the AUXCEN Travel Section directly to the individual(s) listed on the orders.

**iii. NEXCOM and ANACO Travel**

- a. NACO, VNACO, NIPCO, each DNACO, and each ANACO will determine if the travel is required and is within their approved budget or whether it should be submitted to the U. S. Coast Guard for orders issuance (see item 2 below for USCG procedures).
- b. If they determine the requested travel is within the approved budget, they will submit the Orders Request – Travel Plan spreadsheet, to the Coast Guard Auxiliary Center (AUXCEN) Travel Section for preparation of CGAuxA funded orders.
- c. If the ANACO's or DNACO's approved budget does not include the proposed travel, then they will submit their request to the VNACO who will consult with the NACO on whether to approve the request.
- d. If approved by VNACO or NACO, then the approving officer will forward the spreadsheet to the AUXCEN Travel Section for preparation of CGAuxA funded orders.
- e. The AUXCEN Travel Section prepares the orders form and submits it to the Association's Executive Director for review and signature. The Executive Director signs as approving official for expenditures authorized in the approved budget.
- f. Approved/signed orders will be distributed electronically by the AUXCEN Travel Section directly to the individual(s) listed on the orders.

**iv. National Board Travel**

- a. DNACOs will coordinate with their respective District Commodores any National Board travel (N-TRAIN, NACON, NAPM, Flag Conference) requests that are within the approved budget, or they will coordinate with the VNACO and NACO if it is to be submitted to the U. S. Coast Guard for orders issuance (see item 2 below for USCG procedures).
- b. If the requested travel is within the approved budget, they will submit the Orders Request – Travel Plan spreadsheet, to the Coast Guard Auxiliary Center (AUXCEN) Travel Section for preparation of CGAuxA funded orders.
- c. The AUXCEN Travel Section prepares the orders form and submits it to the Association's Executive Director for review and signature. The Executive Director signs as approving official for expenditures authorized in the approved budget.

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- d. Approved/signed orders will be distributed electronically by the AUXCEN Travel Section directly to the individual(s) listed on the orders.

**v. District Staff Officers (DSOs) N-TRAIN Participants**

- a. The AUXCEN Travel Section will provide each District Commodore (DCO) with an Orders Request – Travel Plan form that lists the designated DSOs to attend N-TRAIN.
- b. Each DCO, as soon as they identify the specific DSOs, will complete the Orders Request – Travel Plan form including the DSO's full name, employee ID (EMPLID), the staff position, mailing address and e-mail address. Submit the form to the AUXCEN Travel Section for preparation of CGAuxA funded orders.
- c. The AUXCEN Travel Section prepares the orders form and submits it to the Association's Executive Director for review and signature. The Executive Director signs as approving official for expenditures authorized in the approved budget.
- d. Approved/signed orders will be distributed electronically by the AUXCEN Travel Section directly to the individual(s) listed on the orders.
- e. CGAuxA orders normally cover DSO Per Diem/lodging. DCOs must coordinate with their respective Director of Auxiliary (DIRAUX) the issuance of orders to cover all other travel related expenses. Occasionally, some program areas may sponsor special training in conjunction with N-TRAIN. Such special training sessions are funded by that program manager. The respective Directors (DIRs) will coordinate such training and order issuance with the sponsoring program manager.

**vi. Actual Cost Orders**

- a. All requests for actual cost orders will be submitted to NACO for approval through the appropriate DIR, ANACO, and DNACO. Sufficient justification to support the request must be submitted.
- b. Generally, actual cost orders are only issued to NACO.

**D. Travel Claim Submission**

**i. Reimbursement Process**

- a. Each individual traveler using CGAuxA funded orders must submit a travel claim, form CGAuxA-3, to the AUXCEN Travel Section within 7 days of completing the travel. Claims not received within a timely manner may be rejected.
- b. The traveler completes CGAuxA-3 through Expense Type line 10 as well as line 14. The traveler signs and dates the form, may be electronic, in the Signature of Claimant section.
- c. The Traveler then submits the CGAuxA-3 in accordance with the instructions on page 2 of the form. The Traveler must attach a copy of the orders authorizing the travel along with all required receipts to the claim. The AUXCEN Travel Section completes lines 11, 12, 13 and 15 when processing the claim based on the authorizations on the orders.
- d. The AUXCEN Travel Section processes the claim ensuring all required documentation is included and verifies the travel was as authorized on the travel orders. The claim is then forwarded to the Association's Executive Director for approval and signature. The

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Executive Director signs as approving official for expenditures.

- e. Once the travel claim is approved, it is routed for check issuance. A copy of the completed claim will be included with the check that is mailed to the traveler.

**ii. General Guidelines on CGAuxA Travel Reimbursement**

- a. CGAuxA reimburses expenses, which usually includes Per Diem, M&IE (meals and incidental expenses), and the authorized lodging rate. A copy of the final, paid hotel receipt is required to support the claim.
- b. The following applies to reimbursement for meals and incidental expenses related to subsistence for a portion of a day:
  - (1) Reimbursement is three-quarters (3/4) of the day's subsistence (M&IE) portion of the Per Diem for the travel days (first day and last day) authorized on the orders.
  - (2) When a hosted meal is received or when the registration fee includes meals, an adjustment to the daily Per Diem meals rate occurs based on 20% for breakfast, 35% for lunch, and 45% for dinner meals.
- c. Reimbursement for use of private conveyance (when authorized) is limited to: gasoline, oil, ferry fares, highway and bridge tolls, and parking fees provided the aggregate of such expense does not exceed the cost of transportation and per diem by the most efficient common carrier (generally coach class airfare). Mileage is NOT reimbursed on CGAuxA orders – actual gas/oil receipts are required regardless of whether the amount is less than \$75.00.
- d. Members receive reimbursement for airfares at a price not to exceed the cost of coach class unless the orders provide specific authorization for other fare rates. Members on CGAuxA orders will obtain the lowest possible fares including senior discounts, when eligible, and purchase their tickets at least thirty (30) days in advance. DO NOT USE the U.S. Coast Guard's designated travel agencies such as SATO for CGAuxA funded orders due to their higher costs. Attach a copy of the ticket or itinerary form documenting prior payment and showing the amount paid for the ticket to the travel claim form. Do not return any unused airfare tickets with claims. Unused tickets may entitle you to a claim with the airline, not CGAuxA. For reimbursement of train and bus fares, follow the same process as airfares including prior approval on the orders.
- e. When a member purchases an airline ticket in advance in order to obtain the most favorable fare and it commits significant personal funds for more than thirty days and if the member desires, he or she may request an INCREMENTAL reimbursement. Submit the incremental reimbursement claim by completing a Claim for Reimbursement Travel (CGAuxA-3), indicating "Incremental Claim" in the remarks section, along with a copy of the Temporary Duty (TD) Request and Travel Order (CGAuxA-1) and a copy of the ticket or itinerary showing the cost of the ticket to the AUXCEN Travel Section at [auxatvl@sbcglobal.net](mailto:auxatvl@sbcglobal.net). Be sure to attach a copy of the incremental claim to the CGAuxA-3 submitted for the final claim. In the event that the orders are changed or cancelled, the traveler receives reimbursement for any fees/charges associated with the ticket adjustment.
- f. Reimbursement may be claimed for commercial fares and expenses incident to transportation such as Limousine service between terminal, home, and/or hotel. Do not use taxis when less expensive travel services are available (shuttle buses, etc.). If total incidental transportation costs (not individual trips) exceed \$75.00, receipts are required.

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- g. Orders must authorize excess baggage fees when traveling on commercial carriers and will include justification for that expense when requesting orders. Excess baggage is for equipment or other materials required for assigned duty. Baggage charges for one or two bags normally used for travel should be claimed as an "OTHER" reimbursable expense on the CGAuxA-3 form.
- h. When two or more Auxiliarists travel together by privately owned conveyance, that fact must be noted on claim form together with the names of the other individuals. The member who is the owner/operator of the vehicle receives reimbursement for the expenses incurred in using the vehicle for the travel.
- i. Remarks by claimant necessary to support any claim will be included in the remarks section of the claim form or by attaching a separate memorandum to the claim. If a required receipt is lost, the statement below will be prepared, signed, and attached to the claim form:

-----  
I \_\_\_\_\_, certify that the receipt for \_\_\_\_\_ has been lost and that all expenses claimed were incurred by me in connection with official travel for which I have not been reimbursed. If the receipt is subsequently found, I will forward it to the AUXCEN Travel Claim Section to attach to my original claim.

Signed \_\_\_\_\_ Date \_\_\_\_\_  
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## 2. Travel Process - US Coast Guard Funded

- A. When the U.S. Coast Guard provides funded orders for a National Staff member(s) to travel to an event, the Auxiliary will not normally fund other staff member(s) to the same event.
- B. When there is a need for an exception to this policy, the appropriate ANACO will prepare detailed justification and forward it along with form CGAuxA-1 to the DNACO for approval.
- C. For travel of NEXCOM members and ANACOs, each will provide the detailed justification for their own travel under these circumstances and send it along with form CGAuxA-1 to NACO for approval.
- D. In the justification in addition to stating why travel for additional members is required, state why the U.S. Coast Guard did not provide the funding for sending the additional members.
- E. In accordance with Coast Guard policy, members traveling on Coast Guard orders are to make their air travel reservations through SATO in order to receive fully refundable tickets in the event of rescheduling or cancellation.
- F. Foreign Travel is not covered by this Standing Operating Procedures Manual.

## Section 6 – AWARDS

### 1. General

- A. As stated in the Auxiliary Manual, COMDTINST M16790.1(series), the recognition of an Auxiliarist's service through presentation of timely and appropriate awards and recognition is essential to the success of the Auxiliary programs.
- B. It is the responsibility of the DNACOs/ANACOs to see that such recognition is made for the National Staff members for their efforts and accomplishments as National Staff Officers.

### 2. Procedures

- A. Chapter 11 of the Auxiliary Manual, COMDTINST M16790.1 (series), discusses awards.
- B. Section 11-D of the AUXMAN, Making a Recommendation, outlines the procedures required in making an award recommendation.
- C. The U. S. Coast Guard Award Recommendation, CG-1650, is normally prepared by the elected or appointed leader for members of the National Staff. A one page Summary of Action or Service is required for the Auxiliary Meritorious Service Medal or higher. Paragraph 11.D.6b. of the AUXMAN outlines the material required in the summary. When no summary is required, a draft citation that supports the proposed award is to accompany the CG1650 form. Sections 11.A. and 11.B. of the AUXMAN describe the applicable awards along with key words to be used for each.
- D. For awards recognizing members for service performed while on National Staff, the following additional procedures apply:
  - i. Directors are to be the originator of the recommendations for members of the National Staff serving in their Department.
  - ii. DNACOs and ANACOs are to be the originator of awards for the National Staff Directors under their supervision.
- E. The recommendation form CG-1650 and summary are to be forwarded 90 days in advance of presentation. Information about award formats and packages can be found at <http://www.uscg.mil/auxiliary/awards/>. Awards packages should be processed so that NACO can provide them to CHDIRAUX not later than 01JUN for awards to be presented at National Meeting and by 01 DEC for awards to be presented at N-TRAIN. Forward the CG-1650 and summary via email in the following chain:
  - i. DIR-----→ANACO
  - ii. ANACO-→DNACO
  - iii. DNACO→VNACO
  - iv. VNACO→NACO
  - v. NACO--→CHDIRAUX
- F. Awards received after the 90 day cutoff will be at the discretion of NACO.
- G. Each official reviewing the recommendation is to give careful consideration to the following items before signing the CG-1650 form:

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- i. Appropriateness - Is a U. S. Coast Guard Auxiliary award appropriate for the action or service?
  - ii. Level of Award - The level of the award is to be reviewed looking at other awards presented for corresponding action or service. Is the level appropriate or would a lesser award be more appropriate?
- H. Individual awards for NEXCOM members and ANACOs will be initiated by NACO.
- I. The CHDIRAUX will initiate any award for NACO.
- J. Prior to forwarding the recommendation to the CHDIRAUX, NACO will coordinate with the member's District Commodore.
- K. When any award recommended by NACO is to be downgraded or disapproved, CHDIRAUX is requested to consult with NACO prior to final action.

### **3. Files**

- A. The CHDIRAUX Office will provide the N-EA and appropriate DIRAUX a copy of all Coast Guard Awards presented at National Meeting and N-TRAIN.
- B. CHDIRAUX will make appropriate AUXDATA entries for these awards.
- C. N-EA will maintain a file of all award recommendations along with final action on each.

### **4. NACO Certificate of Appreciation**

- A. The NACO Certificate of Appreciation is available for recognition of service that does not warrant a U. S. Coast Guard or Auxiliary award.
- B. Members of the National Board and National Staff Operating Committee may recommend members of the U. S. Coast Guard, Auxiliary, or non-members for such recognition. This is a way to give special recognition for service that does not meet the criteria for one of the awards described in paragraph 11.B. of the Auxiliary Manual, COMDTINST 16790.1(series).
- C. A draft letter is to be prepared by the individual making the recommendation. The draft letter is to contain the same information as required in a Summary of Action or Service as described in 11.D.6.b. of the Auxiliary Manual, COMDTINST 16790.1(series). This letter will be provided to NACO at least 90 days prior to the intended presentation date.
- D. Once approved by NACO, the N-EA will prepare the certificate and the accompanying NACO letter.

### **5. National and DSO Support and Recognition**

- A. Job performance by staff members and DSOs is critical for accomplishing all of the tasks expected of the Auxiliary. It is necessary that the correct information is passed down the chain to members and up the chain through departments. It is necessary that staff members and DSOs be energetic, enthusiastic, and proficient in their area of responsibility. Directors and District Directorate Chiefs continually evaluate the job performance of staff members and DSOs in order to provide mentoring for improvement. The following criteria is to be used:

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- i. Job Knowledge - Do they demonstrate the required knowledge of their program area? If they are new, are they learning?
  - ii. Program Management - Do they employ management techniques, records, reports, and controls to guide their program? Is continuing guidance and encouragement provided to those with whom they work?
  - iii. Communications - Do they maintain effective and continuous communications both upward and downward?
  - iv. Responsiveness - Are they responsive to requests made by the National Staff? Are they responsive to other DSOs and SOs?
  - v. Program Support - Do they support the program positively and enthusiastically including decisions made by the National Board, NEXCOM, and National Senior Staff?
- B. These questions serve to identify National Staff and DSO “Top Performers.” Use them to request a NACO Letter of Appreciation.

## **SECTION 7 – COAST GUARD AUXILIARY ASSOCIATION, INC.**

### **1. US Coast Guard Auxiliary Interface**

- A. Purpose - This section provides information regarding U.S. Coast Guard Auxiliary (USCGAUX) activities involving the Coast Guard Auxiliary Association, Inc. (CGAuxA).
- B. Scope - Provisions apply to all members of the USCGAUX with regards to the activities of the CGAuxA.
- C. General Information:
  - i. Policy:
    - a. A proper division between activities of the USCGAUX and those of the CGAuxA is required to comply with various legal and accounting requirements. Activities conducted in the name of CGAuxA including correspondence and position titles will be in accordance with the by-laws and directives of the CGAuxA. Use of government postage for such activities is prohibited.
    - b. The following activities are conducted as CGAuxA activities not USCGAUX activities unless otherwise specifically authorized:
      - (1) Serving as the fiscal agent for the USCGAUX National Board including all monies or funds paid to and deposited into accounts of CGAuxA such as but not limited to national dues, conferences, registration fees, donations, reimbursements, grants and monies received by the Coast Guard Auxiliary Center (AUXCEN). The Fiscal Committee is a function of the CGAuxA as defined in its by-laws.
      - (2) Depositing all monies and funds into the account of CGAuxA in accordance with the by-laws as well as paying all bills, expenses, reimbursements, and other payables paid from such accounts. No monies or funds at the national level will be held or deposited to the account of the United States Coast Guard Auxiliary.
      - (3) All activities of the AUXCEN including without limitation leasing of space, acquisition of inventory, hiring of employees, sales, and receipt of funds.
      - (4) All national level contracts, leases, and agreements will be in the name of CGAuxA unless specifically authorized by Chairman of the Board for CGAuxA.
      - (5) All persons responsible for running the Auxiliary national level meetings will ensure that all registrations and other fees are payable to CGAuxA and such funds are deposited in the proper accounts maintained by CGAuxA.
      - (6) CGAuxA will oversee all national level printing activities for pamphlets, books, and other materials except those that may be specifically licensed to others by CGAuxA.

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- (7) All national level real estate, personal property, copyrights, trademarks, service marks, and patents will be held in the name of CGAuxA. All surplus property accepted and received on behalf of the Auxiliary national organization will be held in the name of CGAuxA.
- (8) All contracts, leases, or agreements in the name of CGAuxA including MOUs and MOAs are reviewed by the CGAuxA General Counsel prior to signature by a designated CGAuxA officer in accordance with CGAuxA's by-laws and policy.

## **SECTION 8 – MISCELLANEOUS.**

### **1. Dress Code**

- A. The civilian dress code for all National Functions is:
  - i. Civilian Formal
    - a. Males – Black tie, tuxedo, or business suit
    - b. Females – Long or short dresses or evening pants suits
  - ii. Civilian Business
    - a. Males – Suit or sports coat and tie
    - b. Females – Dresses or pants suits
  - iii. Civilian Casual
    - a. Males – slacks and collared shirt
    - b. Females – slacks and blouses or dresses
  - iv. Informal Casual - Bermuda shorts and polo (collared) shirt
- B. You may dress up but not dress down.
- C. The military dress code for all National functions will be prescribed for various events by NACO.

### **2. Invitations to District Conferences**

- A. The DNACO will obtain the dates for District Meetings and send to N-EA to be placed on the National Calendar. At the fall NEXCOM meeting NACO will assign a VNACO, DNACO, NIPCO or NACO to attend the meeting.
- B. A National representative will be assigned for each election meeting for a new DCO with or without a specific invitation.

### **3. National Publications – (eg. The Navigator, Navigator Express, etc)**

- A. Please observe the deadlines established by the editor.
- B. Send articles via email directly to DVC-AN at [navigator-editor@auxpa.org](mailto:navigator-editor@auxpa.org).
- C. Each issue of the National Publication will be reviewed by NACO, CHDIRAUX Office, ANACO-FC, and DIR-A prior to publication.

### **4. Illnesses and Deaths**

#### **A. Expressions of Sympathy – Hospitalization**

- i. The Executive Director will arrange for cards when any of the following are hospitalized:
  - a. Current member of the National Board and Executive Staff
  - b. Current National Staff Director
  - c. PNACO
  - d. Spouse of a current member of NEXCOM

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- ii. Advise NACO, VNACO, N-EA, and Executive Director of any known hospitalizations.

**B. Expressions of Sympathy – Deaths**

- i. Flowers will be sent from the Auxiliary when any of the following cross the bar:
  - a. A current member of the National Board and ANACOs
  - b. A current member of National Staff
  - c. A PNACO
  - d. The spouse of a current member of the NEXCOM
- ii. A donation of \$50.00 will be made in the member's memory to O. W. "Sonny" Martin, Jr., U. S. Coast Guard Auxiliary Records Endowment Fund. The Executive Director arranges for and sends the flowers and/or cards, and donations.
- iii. Advise NACO, VNACO, Executive Director, and N-EA regarding deaths. A card will be sent if the current spouse of one of the above passes away.

**C. Death Notices**

- i. A death notice will be sent by N-EA via email upon the death of any of the following:
  - a. A current member of the National Board or Executive Staff
  - b. A past member of the National Board or Executive Staff
  - c. A current National Staff Director
- ii. Notify NACO, the Executive Director, and N-EA of any of the above deaths.
- iii. N-EA sends notification to National Board, PNACOs, ANACOs, Directors, N-D, DVC-AH, and DVC-AN and includes the deceased's obituary when available.

**D. Obituaries in the National Publication**

- i. Obituaries for current NEXCOM members, Executive Staff, and PNACOs will be published in the National Publication.
- ii. DVC-AH will maintain biographical information and photographs of PNACOs and current NEXCOM members

**5. Agreements with other Organizations**

- A. The Coast Guard Auxiliary participates in partnership agreements with outside agencies. Normally, a Memorandum of Agreement (MOA) or Memorandum of Understanding (MOU) is used to ensure all parties involved in a cooperative effort or partnership are aware of the associated objectives, plans, and expectations. Each MOA and MOU will be composed and formatted in accordance with COMDTINST 5216.18 (series).
- B. No member of the Auxiliary may, on behalf of the Auxiliary, enter into a MOA, MOU or other legally binding agreement with an outside agency without adhering to the following procedure.
  - i. District - The member (originator) suggesting consideration of such an agreement will utilize the chain of leadership and management to send all information about the proposed

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- agreement to the DCO and Director, who will both ensure that the proposed agreement does not conflict with preexisting agreements, is in compliance with all Coast Guard policies and procedures, and is beneficial to the Auxiliary. The DCO will have the proposed agreement reviewed and approved by the DSO-LP and appropriate DSOs while the Director will do the same with appropriate district program offices and the district legal office, which may perform a prohibited source determination. If after such review, the DCO and DIRAUX agree that the proposed agreement should be approved, they will have the DSO-LP prepare the agreement in a MOA or MOU format as applicable. If the proposed agreement has nation-wide implications for the Auxiliary, it will be sent by the DCO to the Auxiliary Chief Counsel for review and approval. If the proposed agreement has service-wide implications for the Coast Guard, it will be sent by the Director to the Chief Director, who will ensure a similar review at the Coast Guard Headquarters level. After all applicable reviews of the proposed agreement have been completed, the DCO will notify the originator of the final decision, and if the agreement is approved, it will be signed by the appropriate Auxiliary leader in accordance with the provisions of the Auxiliary Manual, COMDTINST M16790.1 (series). The applicable DSO-LP will maintain a copy of all such agreements.
- ii. National - The national staff officer (originator) suggesting consideration of such an agreement will utilize the national chain of leadership and management to send a copy of the proposed agreement and all pertinent supporting information to the VNACO, who will determine that the proposed agreement does not conflict with preexisting agreements and is beneficial to the Auxiliary. If that determination is made, the VNACO will refer the proposed agreement to the ANACO-CC for a legal review to determine whether the proposed agreement is in compliance with all Coast Guard policies and procedures. After receiving a legal review, ANACO-CC will send the proposed agreement and the results of the legal review to the NACO for approval or disapproval. The NACO will inform NEXCOM of all approved agreements. The VNACO will inform the originator of the final determination regarding the agreement.