



CHAPTER OPERATIONS MANUAL

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I.	Chapter Management and Administration.....	5
a.	Management	5
1.	The Executive Committee	5
2.	Board of Trustees.....	5
3.	Election	6
4.	Duties.....	7
5.	Resignation	7
6.	Termination.....	8
7.	Term of Office	8
b.	Job Descriptions.....	8
1.	Chairman.....	8
2.	Vice Chairman	8
3.	Trustee	9
4.	Treasurer	9
5.	Secretary	9
6.	Committee Chairmen.....	9
c.	Voting Procedures	9
d.	Administration.....	9
1.	By-Laws.....	9
2.	Trustee Oath of Office and Code of Ethics	9
3.	Chapter Mailing Address	10
4.	Chapter Bank Account.....	10
5.	Military Installation Clearance	10
6.	Chapter Liability Insurance	10
7.	Chapter Meetings.....	10
8.	Chapter Reports	10
9.	Region Assignment.....	11
10.	Chapter Deactivation	11
e.	Chapter Committees	11
II.	Association Finances Chapter Accounting Procedures (AFCAP)	12
a.	General.....	12
b.	Management of Chapter Funds.....	12
c.	Internal Revenue Service	13
d.	Chapter Bank Account(s)	13

e.	Chapter Obligations	14
f.	Chapter Treasurer’s Reports	15
g.	Annual Internal Audit	16
h.	Chapter of the Year Program	16
III.	Parliamentary Procedures (Roberts Rules of Order)	17
IV.	Benevolent Programs.....	17
a.	NCOA Disaster Relief Fund.....	18
b.	NCOA Scholarship Fund.....	18
c.	Snowball Express.....	19
V.	State, Regional, National Meetings	19
VI.	NCOA Awards Program.....	19
VII.	Addendum.....	20
a.	NCOA Awards Manual	
b.	Roberts Rules of Order Motions Chart	
c.	Annual Chapter Operations Report Form	
d.	Quarterly Treasurer’s Report Form	
e.	Annual Chapter Treasurer’s Report Form	

I. *Chapter Management and Administration*

a. **Management** – This section elaborates on Articles IV – VI of the NCOA Uniform Chapter By-Laws.

1. *The Executive Committee*

The Executive Committee is the policy-setting body of the chapter and is responsible for establishing the chapter's overall programs and objectives. The Chapter's Executive Committee consists of the Officers and Committee Chairmen (refer to Section V). The chapter officers consist of the Trustees, Treasurer, and Secretary with the Chairman as the executive officer of the chapter. The Chapter's Executive Committee meets at the call of the Chairman and should meet, at a minimum, on a monthly basis.

During the Executive Committee meeting, each Committee Chairman, if present, should report on their Committee's progress to ensure uniformity of information throughout the working group. A foreseeable absence should be made known to the Chairman and a prepared report submitted to be read at the meeting.

During an Executive Committee meeting, the attendees review previous minutes, the Treasurer's Report, and provide information on the programs for the future.

It is important to remember the Chairman has the ultimate responsibility for directing the Chapter. Decisions emanating from the Executive Committee meeting need not be presented for affirmation by the membership. While discussion may be entertained from the floor, the decision of the Trustees is irrevocable unless they themselves choose to review and revise those decisions or defer to a General Membership vote.

2. *Board of Trustees*

The Board of Trustees consists of five members of the Chapter, duly nominated and elected. The Board of Trustees serves as the governing body of the chapter. These Trustees must be current members of the NCOA. No Trustee-elect shall exercise any powers of office until they affirm in writing their willingness to comply with the Uniform Chapter By-Laws, Code of Ethics, and Oath of Office of the NCOA; and thereafter be confirmed and sanctioned to act as signified in writing. As a chapter grows, it may become necessary to elect additional Trustees. Additional trustees can be elected if justified and approved in writing by NCOA Headquarters. At no time will any chapter have more than nine Trustees.

Special Advisor to the Board of Trustees is a person who has served in multiple capacities throughout the Association and can bring a wealth of experience to a chapter. These individuals must have served at an international level, e.g. International Board of Directors, Grand Knight, or NCOA staff. These individuals have served the Association and should be utilized as mentors for a chapter as opposed to an active leader. A Special Advisor does not vote at an Executive Committee meeting. A Special Advisor shall be appointed by a majority vote of the Trustees and will be reaffirmed annually.

3. *Election*

The chapter's Board of Trustees is elected by a simple majority vote of the membership at a duly called General Membership Meeting. A duly called General Membership Meeting is one that has been appropriately advertised, preferably no less than thirty (30) days prior to the meeting. Proxy ballots are not authorized at chapter meetings or elections. All members of the chapter, regardless of division of membership, are entitled to vote on matters requiring a vote by from the General Membership of the chapter. The Secretary and the Treasurer are appointed by the Chapter Chairman.

- All chapters will have a minimum of five Trustees.
- All elected or appointed officers must be members. There are no exceptions to this policy and it is the chapter's responsibility to verify Association membership prior to reporting officers to NCOA Headquarters.
- A member of the International Auxiliary can not serve as an elected trustee of a Regular Division Chapter nor can a member of the Regular, Associate or Veterans Division serve as an elected trustee of an International Auxiliary chapter.
- Once the new Trustees are elected, they will elect the Chapter Chairman and Vice Chairman from their ranks.
- Following the election, the Chapter Chairman should appoint a Treasurer and Secretary. These positions may be combined and may be held by a Trustee.
- Chapters are required to submit a complete signed copy of the Uniform Chapter By-Laws to the NCOA Headquarters and the signed Code of Ethics and Oath of Office for each new Trustee. This must be accomplished upon any change in the chapter officers.

4. ***Duties***

The Board of Trustees duties include:

- Plan and direct chapter operations and programs.
- Accept, review and act on proposals and requests from the general membership.
- Formulate, adopt and implement recommended policy.
- Receive and review reports from all chapter committees.
- Schedule, at a minimum, monthly Executive Committee meetings and quarterly General Membership meetings.
- Be informed of NCOA Headquarters policies, programs and events and implement at the chapter level.
- Provide the Chapter Chairman with assistance and guidance in the management of the chapter.
- Act as consultants to the Chapter Chairman.

5. ***Resignation***

In the event of a vacancy on the Board of Trustees:

Chapter Chairman – The Vice Chairman will serve as the temporary Chapter Chairman until such time as the Chapter’s Board of Trustees meets and conducts an election to fill the vacated position.

Chapter Vice Chairman - The position will remain vacant until such time as the Chapter’s Board of Trustees meets and conducts an election to fill the vacated position.

Chapter Treasurer or Secretary - The Chapter Chairman will appoint an individual to the vacated position as soon as possible.

Trustee - The Chapter’s Board of Trustees will meet and appoint an individual to fill the unexpired term of the vacating trustee. At no time can the number of appointed trustees exceed 50% of the Chapter’s Board of Trustees. If more than 50% of the elected trustees vacate their positions a special election will be held. All appointed trustees are subject to election at this time.

6. *Termination*

Each trustee so sanctioned shall serve for the elected term of office or until: (a) voluntarily resigning, (b) PCS (c) position as Trustee is declared vacated by direction of the International Board of Directors or (d) a Trustee may be removed by majority vote of the other Trustees when their actions have been detrimental to the Chapter membership and/or the Non Commissioned Officers Association.

A trustee can be recalled by a motion from the floor at a General Membership meeting, to be voted on at the following General Membership meeting. This meeting can be a special meeting agreed upon by a majority vote of the membership. Upon majority vote to terminate decision will be effective immediately. Removed trustee may appeal through the Chapter Chairman to the International Board of Directors. The Chairman will present the appeal to all trustees. Each trustee will provide a written comment to HQ. The Chairman will forward the entire package to HQ for final decision.

7. *Term of Office*

- Chairman/Vice - may serve in this position for a period of 1-3 years as determined by chapter after which time they may or may not be reelected.
- Trustees - may serve in this position for a period of 1-3 years as determined by chapter after which time they may or may not be reelected.
- Secretary, Treasurer, Committee Chairmen - Appointed by Chapter Chairman at their discretion.

b. **Job Descriptions**

1. **Chairman** – The Chapter Chairman serves as the Chief Executive Officer of the Chapter. The Chairman presides over all executive and business meetings of the chapter. The Chairman is responsible for ensuring that the Vice Chairman and the Executive Committee are aware at all times of the chapter's activities and functions. The Chapter Chairman has ultimate responsibility for the administrative and financial management of the chapter.

2. **Vice Chairman** - The Chapter Vice Chairman acts as the Chairman in the absence of the Chapter Chairman. The Chapter Vice Chairman must remain thoroughly informed on all matters pertaining to the chapter

3. **Trustee** - Trustees are consultants to the Chapter Chairman. They will keep current of NCOA policies and programs. They will provide the Chapter Chairman with assistance and guidance in the management of the chapter.

4. **Treasurer** - The Chapter Treasurer is appointed by the Chapter Chairman. The Treasurer is responsible for proper accounting of all chapter funds and financial records in accordance with the "International Association Finances Chapter Accounting Procedures (AFCAP)". The Treasurer's Report will be submitted to NCOA Headquarters on a quarterly basis.

5. **Secretary** - The Chapter Secretary is appointed by the Chapter Chairperson to maintain the general business records of the chapter and to keep the written minutes of all chapter business meetings and submit copies of all minutes to NCOA Headquarters on a quarterly basis.

6. **Committee Chairmen** - Each Committee Chairman is responsible for ensuring that their committee operates within the NCOA and Chapter guidelines. They will report to the Board of Trustees monthly as to the status of their program. They have no authority to commit NCOA funds or resources without the express permission of the Board of Trustees. They shall structure their committee to meet the needs of their program.

c. **Voting Procedures**

- All voting will be conducted in accordance with Roberts Rules of Order which can be purchased in most book stores or found on the internet at www.robertsrules.org

d. **Administration**

1. **Chapter By-Laws**

Uniform Chapter By-Laws conform to the legal provisions of the Articles of Incorporation and By-Laws of the International NCOA, including the State and Federal laws under which the Association operates. No amendment, deletion, or addition by Chapter members is authorized, nor shall have any lawful affect. Chapters are required to submit a complete signed copy of the Chapter By-Laws and the signed Code of Ethics and Oath of Office for each new Trustee to the NCOA Headquarters. This must be accomplished upon any change in the chapter officers.

2. **Trustee Oath of Office and Code of Ethics**

Chapters are required to submit a complete signed copy of the Chapter By-Laws and the signed Code of Ethics and Oath of Office for each new Trustee to the

NCOA Headquarters. This must be accomplished upon any change in the chapter officers. Ideally this should be done in a ceremony before the membership.

3. ***Chapter Mailing Address***

Chapters must maintain a permanent mailing address and ensure that the address is provided to NCOA Headquarters. A post office box is highly recommended.

4. ***Chapter Bank Account***

All Chapters are required to maintain a checking account. Copy of the bank signature card must be provided to NCOA Headquarters.

5. ***Military Installation Clearance***

Many military installation commanders require local chapters to obtain authorization if any chapter functions will be held on the installation. When a chapter is requested to obtain such authorization, contact NCOA Headquarters, Attn: Chapter Services, immediately. NCOA Headquarters will prepare the appropriate documentation and cover letter and forward the packet to the Chapter Chairman for signature and forwarding to the appropriate base officials. Be sure to provide the correct military title, name and mailing address to Chapter Services when requesting the packet.

6. ***Chapter Liability Insurance***

Liability insurance is often required, and highly recommended, for chapters when the chapter conducts various events and functions. The responsibility for obtaining liability coverage for chapter sponsored events lies solely with the chapter. Liability insurance is available either through local companies or chapters may contact NCOA Headquarters for guidance.

7. ***Chapter Meetings***

The success or failure of a chapter is predicated upon the communication between the chapter officials and the general membership. With this in mind, the International Board of Directors requires all chapters to have at least one Executive Committee meeting monthly and a General Membership Meeting quarterly.

8. ***Chapter Reports***

All official meetings of the chapter must be properly recorded. Official meetings include Executive Committee Meetings, Committee Meetings and General Membership Meetings. A copy of the minutes for all meetings must be submitted to NCOA Headquarters on a quarterly basis and must be signed by the Chapter

Chairman or Vice Chairman and the Chapter Secretary (or acting Secretary). A copy of all meeting minutes must be retained in the chapter file.

The Chapter Treasurer's Report, NCOA Form TR-1, is required quarterly and must arrive at NCOA Headquarters no later than the 20th day following the end of the calendar quarter (April 20th, July 20th, October 20th, and January 20th). The Treasurer's Report must be signed by the Chapter Chairman or Vice Chairman and the Treasurer. A copy must be retained in the chapter files. Failure to submit the TR-1 in a timely manner will be cause to place the chapter in an inactive status.

The Annual Chapter Treasurer's Report, NCOA Form TR-2, must be submitted no later than January 31st of the subsequent year.

See the International Association Finances Chapter Accounting Procedures (AFCAP) portion (Section II) of this manual for detailed instructions.

9. ***Region Assignment***

All chapters are assigned to one of the Association's designated regions. Contact HQ for regional designations.

10. ***Chapter Deactivation***

Upon disbanding the Chapter the highest ranking Chapter officer will render a final financial accounting and forward all records, property and funds to International Headquarters. If a chapter is closed due to inactivity, NCOA International Headquarters, as the parent organization, shall close all chapter bank accounts and capture any funds in said accounts.

e. **Chapter Committees** - Chapters should establish as many committees as necessary to conduct the business and operation of the chapter in a successful manner.

Following are recommended committees:

- Membership Committee
- Public Relations Committee
- Legislative and Resolutions
- Awards
- Fund Raising

II. *International Association Finances Chapter Accounting Procedures (AFCAP)*

a. **General**

This section establishes the procedures to be used to maintain the chapter's financial records.

- The Director of Chapter Services is the Association authority, appointed by the International Board of Directors, responsible for ensuring all chapters fully comply with this procedure.
- The Chapter's Board of Trustees has fiduciary responsibility for the chapter's financial assets and will be held responsible for ensuring full compliance with this directive.
- The Chapter Chairman, Vice Chairman and Treasurer are responsible for ensuring the procedures outlined in this section are followed and sufficient checks are in place to maintain proper disbursement of chapter funds.
- The AFCAP are required by federal, state, local or military authority and must be fully complied with or the chapter will be placed in an inactive status or deactivated pending full compliance.
- All reports submitted to NCOA Headquarters should be sent to the attention of Chapter Services.

b. **Management of Chapter Funds**

- Expenditure of Funds. The Chapter Chairman has the final fiduciary, to the Chapter Trustees and NCOA Headquarters, for all chapter funds. No project should be undertaken unless sufficient funding is available to satisfy all debts of the project without depleting chapter funds.
- All chapter funds must be dispersed via chapter check, credit card and/or petty cash. If using a credit card it must be a business or corporate account. If multiple cards are needed each card will have a separate card number and be able to be individually tracked under the same account. **All credit card balances must be paid in full each billing cycle; at no time will any chapter carry over a balance.**
- Petty Cash - Chapters may maintain a petty cash fund, although this should only be when absolutely necessary. When petty cash funds are maintained, the names of those in possession of the cash must be entered under Section III of the Chapter Treasurer's Report (TR-1). Petty cash expenditures must be authorized by the Chapter Chairman. Receipts and/or proper documentation

are required upon disbursement and this fund should be kept to the absolute minimum required.

c. **Internal Revenue Service**

- Tax Number - NCOA has been designated as a tax-exempt, fraternal organization under section 501(c)(19) of the IRS code. The Association has been issued a tax number by the IRS. Upon chartering a new chapter, NCOA Headquarters will apply to the IRS on behalf of the chapter to establish an individual tax number. Chapters are exempt from paying federal income tax. This does not mean that chapters are exempt from paying state sales tax on merchandise or supplies unless the chapter applies directly with their State Comptroller's office, or appropriate state office for such exemption.
- Tax Reporting - Chapters are administrative branches of the Association for purposes of tax reporting. All reports, legal or financial, requested by any governmental office will be prepared by the Accounting Department of NCOA Headquarters to include an annual consolidated IRS return for all chapter accounts.
- Inquiries - Chapters will not attempt to respond to any inquiries concerning tax, legal, or accounting matters from any military or civilian governmental office. All such inquiries will be immediately forwarded to NCOA Headquarters (Attn: Chapter Services).
- Tax Deductibility - Donations to NCOA, the NCOA International Auxiliary, and the NCOA Scholarship Fund, Medical Fund, Disaster Relief Fund and National Defense Foundation are tax deductible under Section 170(c)(2) of the IRS Code. NCOA annual membership dues are not deductible.

d. **Chapter Bank Account(s)**

- Each chapter will maintain an individual checking account for deposit and disbursement of chapter funds. Account number and the bank's name and address must be provided to NCOA Headquarters.
- Signatures - All disbursements by chapter check shall require two approved signatures. Normally, this will be the Treasurer and Chapter Chairman or Vice Chairman. However, the Secretary or any Chapter Trustee may also be an approved signatory. Bank signature cards should carry a minimum of three signatures to assure continuity of business.
- Signature Cards - These are provided by the banking facility and must be completed by the Chairman, Treasurer and Vice Chairperson (or other

approved signatories). A copy of the completed signature card must be provided to NCOA Headquarters

- New Chapters - While the chapter is being organized, the local chapter members must assume personal responsibility for any chapter funds in their possession. The chapter bank account should be opened when the chapter is duly organized and receives the Chapter Charter from NCOA Headquarters.

e. **Chapter Obligations**

- Games of Chance - Chapters are prohibited from conducting any games of chance such as bingo, lotteries, Monte Carlo, etc., unless express written permission has been granted by the local and/or military authorities and NCOA Headquarters.
- Chapter Loans - Chapters may not loan any chapter assets to any individual, organization or firm.
- Required Reports - Chapters must submit minutes of all meetings and the quarterly Treasurer's Report in a timely manner to remain in an active status. The minutes must be signed by the Secretary and the Chairman or Vice Chairman. Quarterly Treasurer's Reports and minutes are due at NCOA Headquarters not later than the 20th day of the month following the end of a calendar quarter.

<u>Quarter</u>	<u>Due Date</u>
1st Qtr (Jan-Mar)	April 20
2nd Qtr (Apr-Jun)	July 20
3rd Qtr (Jul-Sep)	October 20
4th Qtr (Oct-Dec)	January 20

- Expenditures - All chapter expenditures should be paid by check. If paid with cash or a credit card, a receipt must be obtained.
- Escrow - Escrows are encouraged for the NCOA Scholarship, Medical, Disaster Relief Funds and any other special benevolent projects the chapter may conduct. Chapters are encouraged to deposit escrow funds into savings accounts or Certificates of Deposit. Once monies have been placed in escrow they may not be spent for any other purpose. These monies must be disclosed on your Quarterly and Annual Treasurer's Reports.
- Symposiums/State Meetings/Conferences - Chapters are encouraged to send as many delegates as possible to Regional Symposiums, State Meetings and

the Annual Conference. Recommended reimbursement for chapter delegates is as follows:

- Transportation - Subject to availability of chapter funds, may be reimbursed up to actual airfare cost or current standard IRS mileage for personal auto use. The mileage reimbursement will be in lieu of actual car expenses en route to the official function.
- Lodging and Meals - Subject to availability of chapter funds, may be reimbursed up to actual expense for all officially designated chapter delegates.
- Registration costs - May be paid in full by the chapter for all chapter delegates.
- Responsibility - Although the Chapter Treasurer is responsible for accounting of the chapter finances, the final responsibility and authority at the chapter level rests with the Chapter Chairman.
- Deactivation - Chapters failing to submit required reports to NCOA Headquarters will be placed in a temporary inactive status. If the chapter remains inactive for six months, it will be deactivated and all chapter funds, records, documents and any other pertinent materials must be returned to NCOA Headquarters. Upon deactivation of the chapter it should be understood that any legally due and outstanding indebtedness incurred by the chapter will become a liability of the elected officials of the chapter who authorized the expenditures. This procedure is dictated by federal authority and will not vary.
- Mismanagement/Misappropriation of Chapter Funds - Any chapter official who mismanages or misappropriates chapter funds will be subject to civil legal action and/or military discipline.

f. **Chapter Treasurer's Reports**

1. *Quarterly Treasurer's Report (NCOA Form TR-1)*

- Due Date - The Quarterly Treasurer's Report, NCOA Form TR-1, must be sent to NCOA Headquarters (Attn: Chapter Services) so as to arrive no later than the 20th day of the month following the end of the report quarter. The form must be typed or legibly printed in ink. Use additional forms if more space is required. A copy must be retained for the chapter's file.

- Signatures - All reports must be signed by the Chapter Treasurer and either the Chapter Chairman or Vice Chairman. Two authorized signatures are required on all reports.
- Posting Income or Expenditures - Place the appropriate amount in the column that most nearly applies. If in doubt, the entry may be shown under miscellaneous. The report columns are designed to provide the minimum information required by NCOA Headquarters for tax accounting accuracy.
- Income from Headquarters - Membership dues rebates paid by NCOA Headquarters need not be itemized.
- Method of Payment - When a check covers expenses that appear in more than one column of the report, reflect the appropriate amount under each applicable expense column.

2. *Annual Treasurer's Report (NCOA Form TR-2)*

- The Annual Chapter Treasurer's Report, NCOA Form TR-2, is forwarded to the chapter for completion and must be returned to NCOA Headquarters (Attn: Chapter Services) no later than 30 days after calendar year cut-off date. This form is a complete recap of all chapter income and expenditures for the previous calendar year. These forms will be compiled at NCOA Headquarters and filed with appropriate IRS forms directly to the Internal Revenue Service.
- The fiscal year for the Association is January 1 through December 31.
- Report must be signed by Chapter Treasurer and Chairman or Vice Chairman. Absent two of these three, a duly elected chapter trustee may sign.

g. **Annual Internal Audit**

Each chapter must have an annual audit conducted by 2 impartial chapter members. Also, any time there is a change of chairman or treasurer, an audit should be done. A copy of audit findings signed by the audit committee members must be provided to Chapter Services. Questions regarding conducting an internal audit should be addressed to Chapter Services.

h. **Chapter of the Year Program**

Annually, the Association selects both a Small and Large Regional Chapter of the Year for each of the Association's regions. These awards will be presented at the

Annual Conference. Additionally, from the regional winners, one small and one large chapter will be selected as overall Small Chapter and Large Chapter of the Year.

Chapter selection will be based on points obtained and substantiated in the Annual Chapter Operations Report (ACOR) found in the addendum of this manual.

The ACOR will cover the calendar year and must be completed and signed by the Chapter Chairperson and submitted to Chapter Services, NCOA Headquarters, no later than 28 February of each year. Information on the Operations Report will be verified by NCOA Headquarters.

III. *Parliamentary Procedures (Roberts Rules of Order)*

All meetings and voting should be conducted in accordance with Robert Rules of Order which can be purchased in most book stores or found on the web at www.robertsrules.org.

The Roberts Rules of Order Motions Charts can be found in the Addendum to this manual.

IV. *Benevolent Programs*

a. **NCOA Disaster Relief Fund**

The NCOA Disaster Relief Fund is a certified Texas Non-Profit Corporation, Federal ID # 74-2756133. The Fund is designated by the Internal Revenue Service as a tax-exempt, 501(c)(3) corporation and, as such, all contributions to the Fund are deductible to the extent provided by Section 170 of the Internal Revenue Code.

The NCOA Disaster Relief Fund was established in July 1994 to provide immediate emergency relief to enlisted military members who suffer losses as a result of disasters such as acts of God, hurricanes, floods, fires, earthquakes, etc. Grants are intended to assist with emergency needs such as food, temporary lodging and necessary clothing resulting from the disaster. Grants are not intended to replace insurance or other available local, state or federal disaster aid. Membership in NCOA is not required to request assistance from this fund.

All requests for emergency assistance should be submitted through and endorsed by the individual's First Sergeant/Chief/Sergeant Major or the local NCOA chapter chairperson. Request should include the following:

- > Individual's name
- > Individual's rank
- > Individual's address
- > Short written narrative outlining nature of loss

- > Cost estimate of loss
- > Nature of immediate emergency needs

Recent grants include:

\$1,000 to assist a Marine Corps Corporal with food and lodging expenses following a fire that destroyed his home.

\$1,000 to assist an Army Reserve Sergeant who lost his home to Hurricane Katrina.

\$1,500 to family of Air Force Technical Sergeant killed in Afghanistan to assist with travel expenses to attend memorial ceremony.

\$3,000 to assist family members of 7 military members killed during a training mission in support of the war on terrorism. Grant was made to assist family members with travel expenses.

In addition to hundreds of individual grants for disasters such as fires, floods, tornadoes and hurricanes, the Fund has reacted with immediate grants in a number of mass-disaster situations:

\$3,000 to assist USCG seamen at Oak Island, NC whose housing and all personal belongings were destroyed by fire

\$3,500 to assist USAF families in Abilene, TX whose homes were damaged/destroyed in floods that hit the area

\$4,000 to assist Navy personnel in Norfolk, VA who experienced major losses as a result of a hurricane and the subsequent floods.

More than \$20,000 to assist Army, Air Force, Navy and Coast Guard personnel with emergency living expenses following massive hurricane damages to their homes.

b. NCOA Scholarship Fund

The NCOA Scholarship Fund is a certified Texas Non-Profit Corporation, Federal ID # 74-2351587. The Fund is designated by the Internal Revenue Service as a tax-exempt, 501(c)(3) corporation and, as such, all contributions to the Fund are deductible to the extent provided by Section 170 of the Internal Revenue Code.

Each year academic scholarships are awarded to the children and spouses of NCOA members for undergraduate study. All scholarships are eligible for renewal consideration provided the individual maintains a B average, carries 15 hours and submits a renewal application. Scholarship applications are available from the NCOA website at www.ncoausa.org.

The Distinguished Scholar Program was initiated in 1994. The program enables chapters, individuals and corporations to set up special perpetual scholarships. Donors must donate \$25,000 (5 annual payments of \$5,000). Once the total donation is received, an annual \$900 scholarship is established.

c. **Snowball Express**

NCOA is the official military fraternal association partner for Snowball Express. Snowball Express was started in 2006 with a simple idea – to provide hope and new memories to the children of our Nation’s fallen military heroes who died while on active duty since 9/11. NCOA Headquarters and NCOA chapters have teamed up to support the activities of Snowball Express and to host local Snowflake events.

V. ***State, Regional, National Meetings***

Chapters should send as many representatives as possible to all state and regional meetings. National meetings generally consist of the annual conference or business meeting and each chapter should budget accordingly to send at least one representative.

VI. ***NCOA Awards Program***

The Awards Program for the Non Commissioned Officers Association is one of the most important ongoing programs contributing directly to the growth and success of the NCOA. Properly used, the Awards program will ensure that members who are active in Association affairs are properly recognized and that this recognition will be brought to the attention of the local military and civilian community.

The Awards Program is also designed to recognize non-members who contribute to the success of the Association and/or its stated goals.

Never diminish the importance of an award by requesting it for someone who has not met its criteria. Do not request several awards at one time for the same person or order the same award for any individual more than once; this negates the effect and intent of the Awards Program. When requesting an award, consider what awards the individual has previously received. If an individual’s first award is one of the highest awards the Association gives, what award will you request when their subsequent achievements/actions are even more impressive? Most importantly, do not allow friendship or personal relationships to become a factor in requesting awards.

Objectivity, purpose and performance are the key elements in maintaining an effective Awards Program. Ever mindful of these elements, the Awards program will add immeasurably to the continued growth and success of the NCOA.

VII. *Addendum*

Addendum a - Awards Manual



NCOA AWARDS MANUAL

Revised June 2020

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THE NCOA AWARDS PROGRAM

The Awards Program for the Non Commissioned Officers Association is one of the most important ongoing programs contributing directly to the growth and success of the NCOA. Properly used, the Awards program will ensure that members who are active in Association affairs are properly recognized and that this recognition will be brought to the attention of the local military and civilian community.

The Awards Program is also designed to recognize non-members who contribute to the success of the Association and/or its stated goals.

Please use the information contained herein as your criteria for requesting the appropriate award.

Never diminish the importance of an award by requesting it for someone who has not met its criteria. **Do not request several awards at one time for the same person or order the same award for any individual more than once; this negates the effect and intent of the Awards Program. When requesting an award, consider what awards the individual has previously received. If an individual's first award is one of the highest awards the Association gives, what award will you request when their subsequent achievements/actions are even more impressive? Most importantly, do not allow friendship or personal relations to become a factor in requesting awards.**

Objectivity, purpose and performance are the key elements in maintaining an effective Awards program. Ever mindful of these elements, the Awards Program will add immeasurably to the continued growth and success of the NCOA.

REQUESTING AN AWARD

1. Awards request forms/applications (one for Category I awards certificates, one for Category II, III and IV awards, one for the Award of Honor, one for the International Rat Pack and one for the International Loretta Award) are included in this manual. **Please make copies so that you will have enough forms on hand.**
2. When requesting Category II, III and IV awards, be very specific as to the award being requested and how it will be used. Submit one request form for each award.
3. Telephonic requests for awards will not be accepted at International Headquarters. **All awards requests must be submitted in writing or via e-mail using the appropriate Awards Request Form.**

NCOA AWARDS

CATEGORY I - For members and non-members. May be ordered blank, through NCOA Headquarters. Please use the Category I Award Certificate Request Form.

Certificate of Recognition - For support of the local Chapters, i.e., Certified Merchants, event sponsors, event volunteers, etc.

Military Excellence Awards - For outstanding personal contributions in building the image of the NCO/PO Corps. **May be used for junior and senior enlisted personnel of the month.**

Individual Branches - Award of Quarter & Year - Service member of the Year and Quarter Awards for each individual branch of the Service, (i.e., Soldier of the Year).

Special Olympics Appreciation Award - For participants and supporters of local Special Olympics programs. This award is distributed by NCOA Headquarters.

CATEGORY II - For members only, may be requested by Chapter Chairman, Chapter Awards Chairman or International Auxiliary Chapter Chairman or Awards Chairman.

Commendation Award - For individuals who have contributed to the prestige of the NCO/PO Corps, to include support of the NCOA and for those individuals who excel in the performance of their required duties.

Achievement Award - For outstanding personal and individual efforts in support of International Headquarters projects and high priority chapter projects.

International Auxiliary Outstanding Recruiter Award - For exceptional efforts in new membership recruiting and dedication to the aims, goals and ideals of the Auxiliary which contribute to the growth and success of the Association.

CATEGORY III - For members and non-members

Certificate of Achievement - For specific outstanding achievements either in support of the NCOA, the military and civilian community, or for a personal achievement of the recipient.

International Auxiliary Outstanding Performance Award - For recognition of the exceptional individual efforts of members toward the enhancement of the Auxiliary and the Association overall

Outstanding Chapter Chairman - Requested by chapter when chairman leaves office to recognize him/her for accomplishments while in office. May also be requested to honor chairman's past accomplishments when re-elected to another term in office.

CATEGORY IV -

Award of Excellence - For Members only. This prestigious award should be awarded sparingly for outstanding sustained contributions in support of chapter and the aims and goals of the Association as a whole. Should be requested only if individual has already received Category III or lower awards

President's Award - This prestigious award can only be requested and awarded by the NCOA President or a Chapter Chairman. Presented in recognition of outstanding efforts by individuals and chapters in support of the Association and the President.

CATEGORY V -

Award of Honor - For Members only. One of the most prestigious awards that can be requested. Justification must be sufficient to merit consideration. Award can only be approved by the International Board of Directors when in session. An Award of Honor application is included in this Awards Manual. Following is the criteria for the Award:

- 1) Nominee must be a continuous NCOA member for a minimum of 10 years.
- 2) Nominee must have served as a chapter officer/trustee for a minimum of 5 years.
- 3) Service to Headquarters - Although desired, not mandatory. Service to Headquarters is service such as membership on committees, headquarters special projects and staff members, Board of Directors Members, etc.
- 4) Member Knights of the Square Table - Although desired, not mandatory.
- 5) Nominee must have received at least two Awards of Excellence, five Super Saxons, and any combination of 5 Category II or higher awards.
- 6) Nominee must have attended three conferences in the previous six years.
- 7) Civilian accomplishments benefiting the Association.
- 8) A narrative regarding the nominee's NCOA accomplishments must accompany application.

All Award of Honor requests will be screened and reviewed by the International Board of Directors Awards Committee prior to being submitted along with the Committee's recommendations to the entire International Board of Directors. Recommendations for the Award of Honor must be submitted to arrive no later than 90 days prior to the convening of the NCOA Annual Business Meeting.

NCOA Hall of Fame Award – For Members Only. The most prestigious award that can be requested. Justification must be sufficient to merit consideration. Hall of Fame Petition must be submitted to NCOA Headquarters for review and verification prior to December 1st. Following review, petition will be provided to the Board of Directors Awards Committee. Award can only be approved by the International Board of Directors when in session.

A Hall of Fame application is included in this Awards Manual. Following is the basic criteria for the Award:

- 1) Individual can only be nominated after death.
- 2) Must have been a paid up member in good standing of the NCOA

- 3) Individual must have demonstrated sustained significant support of the Association throughout their membership.
- 4) Must have been a Knight of the Square Table for seven or more years and elevated to Order of Excalibur or highest Order available at the time of death.

The NCOA President and Chairman of the Board assisted by members of the Knights of the Square Table will conduct an appropriate installation ceremony for the Hall of Fame awardee at the Opening Ceremony for the next NCOA Annual Convention following approval of the award.

SPECIAL CATEGORY -

Honorary Membership - For high-ranking military officials and civilian dignitaries only, i.e., base commanders, general and flag officers, senators, congressmen, mayors, etc., who would not otherwise be eligible for membership in NCOA. Request must include award request form, **completed membership application**, and statement that proposed recipient has agreed to accept the award.

Super Saxon Merit Award - For Members only. Designed to honor members who have contributed above and beyond to Association development on an annual basis. Awarded annually in December based on the recommendation of the chapter chairman. The deadline for recommendations is November 15 of each year. Social Security or member numbers for each person recommended **must** accompany the request.

NCOA Junior ROTC Award- National award to be presented annually to the most outstanding Cadet NCO or Petty Officer in a JROTC unit during the past school year. The program is administered exclusively by the NCOA Central Valley Chapter. This award consists of a certificate, presentation folder, bar ribbon and drape with medal and does have an associated cost. **All inquiries regarding this recognition award and the NCOA JROTC Program must be directed to the Central Valley Chapter JROTC Program Coordinator at ncoajrotc@aol.com or jrotc@ncoal551.org.**

INTERNATIONAL RAT PACK

Since its inception, the International Rat Pack has been the appropriate instrument to reward and recognize those members who have made significant contributions to the NCOA, particularly in the area of membership recruiting. The membership recruiting requirement has become more difficult for an individual to attain resulting in the present practice of joint recruiting for an individual. The "significant contribution" standard has never been defined and has remained as a subjective goal determined by the Chairman of the International Rat Pack Chapter.

In an effort to provide a definitive standard for Rat Pack membership, the following qualifications were established. There will be no exceptions granted to this policy.

Qualification Procedure for Admittance into The NCOA International Rat Pack

1. The Chairman of the International Rat Pack Chapter shall be the President of the NCOA or an individual appointed by the President. Appointment of chapter officials, conducting the annual initiation and administration of chapter records will be the responsibility of the Chairman.
2. Members shall be qualified to apply for membership in the Rat Pack upon the attainment of 100 points.

International Rat Pack Point System

Accomplishment	Points
1. Service as Chapter Chairman	20/year
2. Service as Chapter Trustee/Officer	10/year
3. Service as a NCOA Employee	10/year
4. Service as Chapter Special Project Chairman	8/project
5. Service as Chapter Committee Chairman	8/committee
6. Conference attendance prior to application	5/convention (max - 10 points)
7. Service as Conference Volunteer	5/convention
8. Membership Recruiting	5/member (min. - 25 points)
9. Membership Longevity	2/year
10. Category II and III Awards	5/award
11. Category IV & Special Category Awards	
Super Saxon Merit Award	10 points (max. - 10 points)
Award of Excellence	25 points (max. - 25 points)

The application for membership in the International Rat Pack must contain the years pertinent to your achievement and, in the case of membership recruiting, must be accompanied by a listing of members recruited. This listing must contain the full name and membership number. A minimum of 25 points on each Rat Pack application must be earned as a result of membership recruiting.

If the information on an application cannot be verified, it will not be approved.

APPLICATION - INTERNATIONAL RAT PACK MEMBERSHIP

(Full Name)

(Membership Number)

I do hereby proclaim my qualification for membership in the International Rat Pack is fulfilled as attested by the completed application below. I further understood that I must be recognized in person at the Rat Pack Recognition Ceremony at an International Convention in order for my entry to be complete.

NCOA INTERNATIONAL RAT PACK Point Accumulation			
ACCOMPLISHMENT/AWARD	CHAPTER/COMMITTEE/DATE	YR(S)/#ea.	POINTS
Chapter Chairman			
Chapter Trustee/Officer			
NCOA Employee			
Chapter Special Project Chairman			
Chapter Committee Chairman			
Conference Attendance <i>(Max 10 points)</i>			
Conference Volunteer			
Membership Recruiting * <i>(Min 25 points)</i>			
Membership Longevity			
Category II & III Awards			
Category IV/Special Category Awards Super Saxon <i>(Max 10 points)</i>			
Award of Excellence <i>(Max 25 points)</i>			
		Total Points	

** Attach list containing full name and membership or Social Security Number of each member recruited.*

Signature _____ Date _____

Mailing Address _____

.....
(Headquarters Use Only)

Verified by: _____ Date Received: _____

Approved _____
 Chairman, International Rat Pack Chapter

INTERNATIONAL AUXILIARY LORETTA AWARD

A total of 100 points is required to qualify for the coveted Auxiliary Loretta Award. Points may be accumulated using the point system outlined below.

International Auxiliary Loretta Point System

Accomplishment	Points
1. Service as Auxiliary Chapter Chairman	20 points/year
2. Service as an Auxiliary Chapter Trustee/Officer	10 points/year
3. Service as an Auxiliary Committee Chairman	8/year
4. Service as an Auxiliary Special Project Chairman	8/project
5. Auxiliary Membership Recruiting	5/member (min. - 25)
6. Auxiliary Membership Longevity	2/year

Awards

Outstanding Chapter Chairman	10 points (max. - 10 points)
Super Saxon Merit Award	10 points (max. - 10 points)
Auxiliary Outstanding Performance Award	10 points (max. - 10 points)
Award of Excellence	25 points (max. - 25 points)
Auxiliary Major Awards (<i>Betsy Ross Top Recruiter, Auxiliary President's Award, Outstanding Recruiter Award, Top Supporter Award</i>)	20 per award

Application for the Loretta Award must list the years pertinent to your achievement and, in the case of membership recruiting, must be accompanied by a listing of recruited members. The list must contain the full name and membership number. A minimum of 25 points on each Loretta application must be earned as a result of membership recruiting.

If the information on an application cannot be verified, it will not be approved.

APPLICATION - INTERNATIONAL AUXILIARY LORETTA AWARD

(Full Name)

(Membership Number)

I hereby proclaim all qualifications for receipt of the coveted Auxiliary Loretta Award have been completed as attested by the completed application below. I understand that I must be recognized in person at the Rat Pack Recognition Ceremony at an International Convention in order for my entry to be complete.

INTERNATIONAL LORETTA AWARD Point Accumulation			
ACCOMPLISHMENT/AWARD	DESCRIPTION	YEAR(S)	POINTS
Auxiliary Chapter Chairman			
Auxiliary Chapter Trustee/Officer			
Auxiliary Special Projects Chairman			
Auxiliary Committee Chairman			
Auxiliary Membership Recruiting *			
Auxiliary Membership Longevity			
Outstanding Chapter Chairman <i>(Max 10 pts)</i>			
Super Saxon Merit Award <i>(Max 10 pts)</i>			
Outstanding Performance Award <i>(Max 10 pts)</i>			
Award of Excellence <i>(Max 25 pts)</i>			
Auxiliary Major Awards <i>(20 pts per award)</i>			
		Total Points	

* Attach listing of full names and membership numbers or Social Security Numbers.

Signature _____ Date _____

Mailing Address _____

.....
(Headquarters Use Only)

Verified by: _____ Date Received: _____

Approved: _____
Auxiliary Liaison

KNIGHTS OF THE SQUARE TABLE

Knight of the Square Table - Members meeting the criteria of the "Steps to Knighthood" must personally petition the Knights Committee at International Headquarters. Petition may be requested from NCOA Headquarters. Those selected are notified to appear before the Knighting Committee at the NCOA Annual Conference/Business Meeting during the year of their selection. Candidates selected who are unable to attend the Knighting Ceremony must contact the Grand Knight in writing or by email requesting excusal. "Knighthood is not just another award; it is a commitment and a responsibility."

STEPS TO KNIGHTHOOD

1. Be a member of NCOA in good standing for a period of at least three continuous years.
2. Be a life member of NCOA.
3. Be a member of the International Rat Pack or Loretta.
4. Have personally participated in at least one civic or charitable program.
5. Have received at least 3 Category II or higher/Special Category NCOA awards.
6. Have attended at least one NCOA Annual Conference or Annual Business meeting prior to application.

In addition, each petitioner must submit a brief synopsis of their personal history and participation in NCOA activities since joining.

The completed and signed petition must be received by the Knights of the Square Table not later than 90 days prior to the Annual Conference.

Order of the Sword:

1. Must have been a Knight for at least three years at the time of girding.
2. Must be nominated, in writing using the Girding Petition, by a member in good standing within the Order of the Sword or Order of Excalibur.
3. Meet all remaining requirements as outlined in the KST Rules of Order.

Order of Excalibur:

1. Must have been an OS for at least three years at the time of girding.
2. Must be nominated, in writing using the Girding Petition, by a member in good standing within the Order of Excalibur.
3. Meet all remaining requirements as outlined in the KST Rules of Order.

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CATEGORY I AWARD CERTIFICATE REQUEST

Type of Award	Quantity	Notes
Military Excellence Award		<i>Maximum order - 20 certificates</i>
Certificate of Recognition		<i>Maximum order - 20 certificates</i>
Soldier of the Quarter		<i>Maximum order - 5 certificates</i>
Soldier of the Year		<i>Maximum order - 5 certificates</i>
NCO of the Quarter		<i>Maximum order - 5 certificates</i>
NCO of the Year		<i>Maximum order - 5 certificates</i>
Airman of the Quarter		<i>Maximum order - 5 certificates</i>
Airman of the Year		<i>Maximum order - 5 certificates</i>
Senior NCO of the Quarter		<i>Maximum order - 5 certificates</i>
Senior NCO of the Year		<i>Maximum order - 5 certificates</i>
Marine of the Quarter		<i>Maximum order - 5 certificates</i>
Marine of the Year		<i>Maximum order - 5 certificates</i>
Petty Officer of the Quarter		<i>Maximum order - 5 certificates</i>
Petty Officer of the Year		<i>Maximum order - 5 certificates</i>
Sailor of the Quarter		<i>Maximum order - 5 certificates</i>
Sailor of the Year		<i>Maximum order - 5 certificate</i>

Please allow 2-3 weeks for delivery of certificates. Requests for quantities in excess of those specified must be approved by the NCOA Awards Coordinator.

(Please Print)

Requested by: _____

Chapter: _____

Mailing Address: _____

**MAIL TO:
NCOA Awards Program
P.O. Box 33790
San Antonio, Texas 78265**

(For Headquarters use only - do not write below this line)

.....

Processed by: _____

Date: _____

CATEGORY II, III, IV & SPECIAL AWARDS REQUEST

(Please Print)

Award requested: _____ Presentation Date: _____

Awardee: _____
(Last Name) (First Name & Middle Initial) (SSN)

(Branch of Service) (Member Number if applicable)

(Street) (City) (State & Zip)

Justification: *(please use reverse side or attach additional sheet if necessary).*

Requested by: _____
(Name) (Member Number)

Chapter: _____

Mailing Address: _____

MAIL TO:
NCOA Awards Program
P.O. Box 33790
San Antonio, Texas 78265

(For Headquarters use only - do not write below this line)

.....
Verified by: _____ Date: _____

Approved by: _____ Disapproved by: _____

AWARD OF HONOR NOMINATION FORM

(Please Print)

Nominee: _____
(Last Name) (First Name & Middle Initial) (Member number)

1) Nominee must be a continuous member for a minimum of 10 years. Date joined NCOA: _____

2) Nominee must have served as a chapter officer/trustee or accredited NCOA representative for a minimum of 5 years. **Please list chapters for which nominee served as chapter officer/trustee (include dates) or list information on accredited capacity (include dates):**

3) It is desired, although not mandatory, that nominee has provided service to Headquarters (such as membership on a committees, Headquarters' special projects, staff members and members of the International and Auxiliary Board of Directors). **Please provide information on service(s) and include dates:**

4) It is desired, although not mandatory, that nominee is a member of the NCOA Knights of the Square Table. **Please provide date of acceptance in the Knights of the Square Table and Order (Knight, Sword or Excalibur) that has been achieved:**

5) Nominee must have received at least two Awards of Excellence, five Super Saxon Merit Awards and any combination of five Category II or higher awards. **Please list awards and include dates received:**

Awards of Excellence: 1) _____ 2) _____

Super Saxon Merit Awards: 1) _____ 2) _____ 3) _____ 4) _____ 5) _____

Category II or higher awards: _____

6) Nominee must have attended three conferences in the previous 6 years. **Please list locations and dates.**

7) Nominee's civilian accomplishments benefiting the Association are taken into consideration. **Please provide information on civilian accomplishments and include pertinent dates:** _____

8) A narrative of nominee's NCOA accomplishments **must** accompany this award request. **Please use a separate sheet of paper.**

Nominated by: _____ Member# _____

Mailing Address: _____

MAIL TO:
NCOA Awards Program
P.O. Box 33790
San Antonio, Texas 78265

HALL OF FAME PETITION

Basic criteria to be met for nomination to the NCOA Hall of Fame are:

- To have been a paid up member in good standing of the NCOA; to be deceased; to have been a Knight of the Square Table for seven or more years; and to have been elevated to Excalibur or highest award available at the time of death.
- Petition should be submitted with a photograph, preferably an 8x10 head & shoulders.
- Petition must be should be submitted to NCOA Headquarters for review and verification prior to December 1. The petition will then be forwarded to the NCOA Board of Directors Awards Committee for their review and recommendation to the entire Board of Directors at their next scheduled meeting.

(Please print or type all information)

		DATE OF PETITION
LAST NAME	FIRST NAME	M.I.
STREET ADDRESS	CITY	STATE & ZIP
LOCATION OF DEATH	AGE AT DEATH	BRANCH OF SERVICE
NCOA MEMBERSHIP NUMBER		DATE JOINED
KIN-LAST NAME	FIRST NAME & M.I.	RELATIONSHIP
STREET ADDRESS	CITY	STATE & ZIP
HOME TELEPHONE		BUSINESS TELEPHONE

DETAILED SYNOPSIS OF THE CANDIDATE'S PERSONAL ACHIEVEMENTS AS A MEMBER OF THE NCOA TO INCLUDE AWARDS (attach additional pages as needed)

DATE ELEVATED TO ORDER OF THE EXCALIBUR (or highest order available at time of death): _____

SUBMITTER'S LAST NAME	FIRST NAME & M.I.	MEMBERSHIP NUMBER
STREET ADDRESS	CITY	STATE & ZIP
HOME TELEPHONE		BUSINESS TELEPHONE

I hereby certify that _____ is fully eligible, to the best of my knowledge, and entitled to be inducted into the NCOA Hall of Fame.

SUBMITTER'S SIGNATURE

Addendum b – Roberts Rules of Order Motion Chart

Parliamentary Motions Guide

Based on *Robert's Rules of Order Newly Revised (11th Edition)*

The motions below are listed in order of precedence. Any motion can be introduced if it is higher on the chart than the pending motion.

YOU WANT TO:	YOU SAY:	INTERRUPT?	2 ND ?	DEBATE?	AMEND?	VOTE?
§21 Close meeting	I move to adjourn	No	Yes	No	No	Majority
§20 Take break	I move to recess for	No	Yes	No	Yes	Majority
§19 Register complaint	I rise to a question of privilege	Yes	No	No	No	None
§18 Make follow agenda	I call for the orders of the day	Yes	No	No	No	None
§17 Lay aside temporarily	I move to lay the question on the table	No	Yes	No	No	Majority
§16 Close debate	I move the previous question	No	Yes	No	No	2/3
§15 Limit or extend debate	I move that debate be limited to ...	No	Yes	No	Yes	2/3
§14 Postpone to a certain time	I move to postpone the motion to ...	No	Yes	Yes	Yes	Majority
§13 Refer to committee	I move to refer the motion to ...	No	Yes	Yes	Yes	Majority
§12 Modify wording of motion	I move to amend the motion by ...	No	Yes	Yes	Yes	Majority
§11 Kill main motion	I move that the motion be postponed indefinitely	No	Yes	Yes	No	Majority
§10 Bring business before assembly (a main motion)	I move that [or "to"] ...	No	Yes	Yes	Yes	Majority

Parliamentary Motions Guide

Based on *Robert's Rules of Order Newly Revised (11th Edition)*

Incidental Motions - No order of precedence. Arise incidentally and decided immediately.

YOU WANT TO:	YOU SAY:	INTERRUPT?	2ND?	DEBATE?	AMEND?	VOTE?
§23 Enforce rules	Point of order	Yes	No	No	No	None
§24 Submit matter to assembly	I appeal from the decision of the chair	Yes	Yes	Varies	No	Majority
§25 Suspend rules	I move to suspend the rules which ...	No	Yes	No	No	2/3
§26 Avoid main motion altogether	I object to the consideration of the question	Yes	No	No	No	2/3
§27 Divide motion	I move to divide the question	No	Yes	No	Yes	Majority
§29 Demand rising vote	I call for a division	Yes	No	No	No	None
§33 Parliamentary law question	Parliamentary inquiry	Yes (if urgent)	No	No	No	None
§33 Request information	Request for information	Yes (if urgent)	No	No	No	None

Motions That Bring a Question Again Before the Assembly - no order of precedence. Introduce only when nothing else pending.

§34 Take matter from table	I move to take from the table ...	No	Yes	No	No	Majority
§35 Cancel or change previous action	I move to rescind/ amend something previously adopted...	No	Yes	Yes	Yes	2/3 or maj. w/ notice
§37 Reconsider motion	I move to reconsider the vote ...	No	Yes	Varies	No	Majority

Addendum c – Annual Chapter Operations Report

ANNUAL CHAPTER OPERATIONS REPORT

	<u>Activity</u>	<u>Point Structure</u>	<u>Points</u>
1.	Membership Recruiting	5 points per new member	_____
2.	Retention	3 points per renewal	_____
3.	New Life Members	3 points per new life member	_____
4.	Contributions to chapter's installation and/or community projects as substantiated in chapter's minutes	1 point per \$10 donated	_____
5.	Volunteer hours for chapter's installation and/or community projects as substantiated in chapter's minutes	1 point per hour donated	_____
6.	Contributions to the NCOA Scholarship, Disaster Relief or Medical Funds, International Auxiliary or NCOA HQs	1 point per \$1 donated	_____
7.	Benevolent programs run/sponsored by chapter as documented in minutes	25 points per program	_____
8.	Chapter News Letter	25 points per issue	_____
9.	Certified Merchant Program	5 points per Merchant	_____
10.	Chapter Web Site – must be currently active, <u>provide web address below.</u>	300 points	_____
11.	Social Function (20 or more attendees)	25 points per function	_____
12.	Voter Registrations	1 point per registration	_____
13.	Co-existing Auxiliary or Regular Division chapter	100 points	_____
TOTAL			_____

Important Notes:

Items 1, 2 and 3 will be completed by NCOA HQs.

*When computing totals for items 4, 5, 6, 7 and 11, if both a Regular Chapter and an Auxiliary Chapter work on a project, points and/or monies must be split by the chapters. **Both chapters cannot claim the total points and/or monies.***

Coupon clippers – volunteer hours should be counted but value of coupons should not be counted.

Chapter Name: _____

Chapter Number: _____

Chairman's Signature: _____

Chapter website: _____

HEADQUARTERS USE ONLY
REGION: _____
S/L: _____

Addendum d – Quarterly Treasurer’s Report Form

Non Commissioned Officers Association of the United States of America
QUARTERLY TREASURER'S REPORT

Section 1

Instructions: Prepare in accordance with Chapter 5, NCOA Headquarters AFCAP Directive.

Print in ink or use typewriter. Prepare in duplicate; retain one copy. Send the original to NCOA Chapter Services, NCOA, P.O. Box 33790, San Antonio, TX 78265-3790. Mail report so as to reach NCOA Headquarters no later than the 20th day of the month following the end of the calendar quarter. Chapter accounting to NCOA Headquarters exempts local chapter from any other tax reporting for purposes of the U.S. Internal Revenue Service.

No reimbursements will be advanced to Chapter unless correct Treasurer's Reports have been received by NCOA. Up-to-date Chapter By-Laws signed by all Trustees, Treasurer and Secretary must be on file at NCOA Headquarters. Chapter refund will not be paid until all above instructions have been complied with. Chapters will not be paid for any members recruited for any quarters the Chapter has been in an inactive status.

Important: All funds from all sources must be reported on this Treasurer's Report.

Section II

Report # _____ Quarter ending _____, _____ Chapter _____

Chapter Mailing Address _____

1. Name of bank _____ Account # _____

Bank Mailing Address _____

2. Name of bank _____ Account # _____

Bank Mailing Address _____

NCOA Form TR-1
Revised 10/21/03

Section III

Balance Brought Forward \$ _____

Total Gross Income This Quarter \$ _____

TOTAL \$ _____

Less Total Gross Expenditures This Quarter \$ _____

Balance Carried Forward, Close This Quarter \$ _____

Petty Cash Held by _____ \$ _____

Cash in Bank 1 \$ _____

Cash in Bank 2 \$ _____

TOTAL \$ _____

(Note: Total cash on hand must equal Balance Carried Forward, Close This Quarter)

Section IV – Gross Expenditures

Show name of payee	Check #	Supplies	Printing	Postage P.O. Box Fee	Charitable Donations	Fund Raiser Expenses	Meeting Expenses	Official Travel	Misc.*	TOTAL
1.										
2.										
3.										
4.										
5.										
6.										
7.										
8.										
9.										
10.										

*Misc. Expenses must be explained on a separate sheet & attached to this report.

Total Gross Expenditures \$

Section V – Gross Income

Source	Chapter Dev. Refund	Fund Raiser Proceeds	Miscellaneous (Type & Amount)	TOTAL
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

*Misc. Income must be explained on this report

Total Gross Income \$

Section VI – Escrow (not an official requirement)

Amount held in escrow for official NCOA-sponsored Symposia & Conventions \$ _____

Amount held in escrow for NCOA Benevolent Programs \$ _____

Funds held for Auxiliary \$ _____

Funds held in escrow for special projects (specify) \$ _____

Section VII We certify that this Report is true, correct and completely reports all Chapter financial transactions for the quarter shown.

Date _____ Chapter Chairman or Vice Chairman _____ Chapter Treasurer _____

Addendum e – Annual Treasurer’s Report Form

Non Commissioned Officers Association of the United States of America ANNUAL TREASURER'S REPORT

Print in ink or use typewriter. Prepare in duplicate; retain one copy for chapter records. Send the original to NCOA Chapter Services, P.O. Box 33790, San Antonio, TX 78265-3790. Chapter accounting to NCOA Headquarters exempts local chapter from any other tax reporting for purposes of the U.S. Internal Revenue Service.

Cash Balance - Beginning of Year \$ _____
 Total Gross Income (from reverse side)..... \$ _____
TOTAL..... \$ _____
 Less Gross Expenditures..... \$ _____
 Cash Balance - End of Year \$ _____
 Cash on hand..... \$ _____
 Cash in bank..... \$ _____
TOTAL..... \$ _____

Report for Year Ending _____
 Chapter Name _____
 Address _____

GROSS EXPENSES

	SUPPLIES	PRINTING	POSTAGE/ P.O. BOX FEE	CHARITABLE DONATIONS (OVER*)	FUND RAISER EXPENSES	MEETING EXPENSES	OFFICIAL TRAVEL	MISCELLANEOUS	TOTALS
JANUARY									
FEBRUARY									
MARCH									
APRIL									
MAY									
JUNE									
JULY									
AUGUST									
SEPTEMBER									
OCTOBER									
NOVEMBER									
DECEMBER									
TOTAL									

UNDER PENALTY OF PERJURY, I DECLARE THAT I HAVE EXAMINED THIS REPORT INCLUDING A COMPANYING SCHEDULES AND STATEMENTS AND TO THE BEST OF MY KNOWLEDGE AND BELIEF, IT IS CORRECT AND COMPLETE TO INCLUDE REPORTING ALL GROSS INCOME AND EXPENSES FROM CHAPTER FUND RAISERS. THIS CHAPTER WISHES TO BE INCLUDED IN THE GROUP RETURN FILED BY INTERNATIONAL HEADQUARTERS.

DATE _____, _____, _____

CHAIRMAN OR VICE CHAIRMAN

TREASURER

