**United States Public Health Service Commissioned Corps**

**Junior Officer Advisory Group**

**General Standard Operating Procedures (SOP)**

**Document History Record for**

**JOAG General Standard Operating Procedures**

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**UNITED STATES PUBLIC HEALTH SERVICE COMMISSIONED CORPS**

**JUNIOR OFFICER ADVISORY GROUP**

**GENERAL STANDARD OPERATING PROCEDURES (SOP)**

# **ARTICLE I**

PURPOSE

The Junior Officer Advisory Group (JOAG) General Standard Operating Procedures (SOP) provides internal guidance for the operations and procedures of all JOAG committees and workgroups. This SOP provides guidance on matters not addressed by the JOAG Charter or the JOAG Bylaws.

# **ARTICLE II**

JOAG COMMITTEES AND MISSION

The JOAG has the following standing committees with respective missions:

|  |  |
| --- | --- |
| Executive (EC) | To serve the general JOAG membership in the execution of the JOAG vision, mission, and objectives. |
|  |  |
| Awards | To facilitate the awards process and recognize junior officers for their accomplishments and commitment to the mission of the United States Public Health Service Commissioned Corps (USPHS). |
|  |  |
| Communications and Publications (CPC) | To facilitate the dissemination of USPHS-related information to junior officers. The Communications and Publications Committee (CPC) is responsible for providing junior officers with pertinent information in a timely and efficient manner. |
|  |  |
| Membership | To facilitate the annual selection of JOAG Voting Members through the nomination and appointment processes outlined in Article VI of the JOAG Bylaws and to increase the general membership of JOAG. |
|  |  |
| Outreach | To connect and recruit newly-commissioned and current junior officers to JOAG by providing information supporting appropriate wear of the PHS uniform and through outreach activities at the Commissioned Officers Training Academy (COTA) open houses/graduations and other approved JOAG participation events, such as major trainings, meetings, conferences and/or PHS awareness events. |
|  |  |
| Policy and Procedures (PPC) | To establish and update guidance documents and operating procedures governing JOAG. The Policy and Procedures Committee (PPC) is also responsible for providing junior officers with updates on USPHS policies. |
|  |  |
| Professional Development | To provide and promote opportunities for junior officers’ professional growth and development. |
|  |  |
| Public Health and Uniformed Service (PHUS) | To enhance health and wellness of junior officers in the USPHS and their communities by providing information and tools that promote health and wellness, and by implementing and supporting community service activities that will promote public health, enhance the visibility of USPHS, and interact with other uniformed services. |
|  |  |
| Readiness and Deployment (R&D) | To promote officer fitness and readiness and provide opportunities to increase deployment-related knowledge, expertise, and training. |
|  |  |
| Recruitment and Retention (R&R) | To develop projects and programs that aid in the recruitment and retention of junior officers in the USPHS. |

# **ARTICLE III**

ORGANIZATION

## ***Section 1.*** Structure

The broadest possible committee guidelines are established in the JOAG Bylaws. With approval of their Executive Committee (EC) Liaison, Committee Chairs may form permanent or ad-hoc Subcommittees or Workgroups within their Committee, as needed. Only the EC shall create Committee-level Workgroups, as needed.

## ***Section 2.*** Size

The size of each committee should be adaptable to meet its mission, as determined by the JOAG EC and Committee Chairs.

## ***Section 3.*** Representation

All junior officers interested in serving on a committee are encouraged to do so. Every attempt should be made to ensure diversity in the following: Agency/OPDIV, professional category, geographic location, and rank.

# **ARTICLE IV**

LEADERSHIP

## ***Section 1.*** JOAG Executive Committee

This committee facilitates the execution of the vision, mission, and objectives developed by the JOAG membership. The JOAG EC shall consist of the following: Chairperson (Chair), Vice-Chairperson (Vice-Chair), Chairperson-Elect (Chair-Elect), Co-executive Secretaries, and Operations Liaison.

## ***Section 2.*** JOAG Liaisons

Liaisons may be identified and selected, as needed, to address issues of importance to JOAG. In coordination with the pertinent organization’s leadership, the leadership of JOAG shall assign one junior officer to serve as the JOAG Liaison to specific USPHS organizations.

## ***Section 3.*** Committee Leadership

The Chairperson of a JOAG Committee shall be a JOAG Voting Member and referred to as the Committee Chair. Two Voting Members may equally share a Chairpersonship and be referred to as the Committee Co-Chairs. The Chair, at his/her discretion, may choose to appoint a single non-Voting Member to the role of Co-Chair.

## ***Section 4.*** Committee Chair

The selection of the Chair for each committee is established in the JOAG Bylaws. The JOAG Chair may establish and disband a committee based on the needs of JOAG. The JOAG Chair-Elect appoints all Voting Member Co-Chairs and in certain circumstances may appoint a non-Voting Member Co-Chair. The current Committee Chair(s) may have input on future Committee Chair membership, but do not make appointments. For more information on this process, EC members may refer to JOAG EC SOP.

## ***Section 5.*** Executive Committee Liaison

The JOAG Chair shall appoint a member of the EC to serve as the EC Liaison to each JOAG committee.

## ***Section 6.*** Subcommittee/Workgroup Lead

The lead of the subcommittee/workgroup shall be referred to as the Lead.

# **ARTICLE V**

EXECUTIVE COMMITTEE ROLES

## ***Section 1.*** The JOAG Executive Committee

1. Chairperson (Chair): The Chair acts as a liaison between the Group and the following entities: Agency representatives, Chief Professional Officers, the Professional Advisory Committee (PAC) Chairs Group, and the Office of the Surgeon General. The Chair also facilitates, organizes, and maintains order in meetings of the Group and meetings of the EC.
2. Vice-Chairperson (Vice-Chair): The Vice-Chair shall act as the Chair in his/her absence, shall serve as the official JOAG Liaison to the Commissioned Officers Association (COA)/Commissioned Officers Foundation (COF) Board of Directors and act as the official Executive Officer Liaison to professional advisory groups, committees and other groups as assigned by the Chair. The Vice-Chair shall have at least quarterly check-ins with liaisons to identify cross-collaborative activities and matters affecting JOAG.
3. Chairperson-Elect (Chair-Elect): The Chair-Elect shall act as the Chair in the absence of the Chair and Vice-Chair and exercise all the rights and responsibilities granted to the Chair by the JOAG Charter and Bylaws. The Chair-Elect oversees all survey activities of general membership and manages survey account, as they relate to JOAG strategic planning initiatives.
4. Executive Secretaries: The Executive Secretaries shall inform the membership of meeting times and webinar/call-in information. They shall also be responsible for establishing meeting agendas in collaboration with the Chair and EC and distributing the agendas as appropriate, preparing and distributing approved minutes, recording and tracking attendance during JOAG General Member and Voting Member meetings, facilitating EC review of Committee/Workgroup documents, and maintaining the EC MAX.gov webpages, which include the EC SOP, EC tracker of priority initiatives, document review tracker, EC meeting notes, etc.
5. Operations Liaison: The Operations Liaison shall keep the voting and general membership informed about JOAG financial and operational aspects, and act as the JOAG financial point of contact to the Commissioned Officers Foundation (COF), where the JOAG financial account is held. Additionally, the Operations Liaison will oversee all matters related to JOAG finances, including maintaining a fiscally responsible budget, processing deposits and reimbursements through COF, and making donations. The Operations Liaison will be the point of contact for JOAG website social media platforms and virtual trainings; this includes maintaining JOAG website EC pages, ensuring the website is accurate and up to date, and supporting webinars and other virtual events sponsored by JOAG. This Liaison may appoint non-voting members as EC volunteers to support these activities, such as a platform technical manager and social media strategic planner.

## ***Section 2.*** Additional Resources

The JOAG Bylaws and EC SOP provide additional procedural information for the EC.

# **ARTICLE VI**

JOAG VOTING MEMBER AND LIAISON ROLES AND RESPONSIBILITIES

## ***Section 1.*** Voting Members

All Voting Members incur the following responsibilities:

1. Attend and participate in Voting Member Meetings and General Member Meetings.
2. Carry out committee-specific duties outlined in the Committee SOP.
3. Score nominations for the JOAG VADM Carmona Inspiration Award.
4. Score nominations for the JOAG VADM C. Everett Koop Award.
5. Score applications for new Voting Members.
6. Prepare written reports (to be included in the minutes) for the JOAG General Member and Voting Member Meetings.
7. Be part of annual strategic planning at the committee level, including the annual review of the committee-specific portion of the JOAG Operational or Strategic Plan.
8. Review SOP and other committee documents at least annually. Note: For documents that require EC review, review all documents in detail and certify that the document is ready for EC review prior to initiating the EC review.
9. For JOAG listserv posting requests, review and submit a statement of clearance to the EC liaison.
10. Review the JOAG Bylaws annually and other governing documents as necessary.
11. Track the first 30 days of JOAG work, which is required for earning a Special Assignment Award during the second year of Voting Membership.
12. Complete End-of-Year Accomplishments Report for their respective Committee.
13. Prepare end-of-year Letters of Appreciation to reward all committee members who met criteria for recognition. Prepare other recognition documents for participation of members in events or other programs, as needed. For more information, please see the Awards SOP.
14. Nominate two Outstanding Non-Voting Members and Secretary(ies) to be recognized at the annual USPHS Scientific & Training Symposium.
15. Score nominations for the JOAG Senior Advisor (occurs every three years).
16. Other duties as determined by the EC to meet the needs of JOAG.
17. If assigned as a liaison to another organization, such as a PAC, please seeSection 2 below for additional duties.
18. Ensure all documents are saved in Max.gov. Please see more information in Article XII.

## ***Section 2.*** JOAG Liaisons

Liaisons may be identified and selected, as needed, to address ad-hoc issues of importance to JOAG. JOAG shall have a liaison for each of the Professional Advisory Committees (PACs), and may have liaisons to the Commissioned Corps Headquarters (CCHQ), the Minority Officer Liaison Committee (MOLC), the Commissioned Officers Foundation (COF) Board, the Commissioned Corps Women’s Issues Advisory Board (CCWIAB), and other OSG chartered groups. The primary liaisons are: Commissioned Corps Women Issues Advisory Board (CCWIAB), Commissioned Corps Headquarters (CCHQ), Minority Officer Liaison Council (MOLC) and Sexual Orientation and Gender Diversity Advisory Group (SOAGDAG). The secondary liaisons are: PHS Athletics, The Association of Military Surgeons of the United States (AMSUS) and Prevention through Active Community Engagement (PACE).

1. Requirements for JOAG PAC Liaisons
   1. A Voting Member of JOAG who can communicate freely and effectively between JOAG and their PAC.
   2. Ideally, have been an active JOAG member for at least a year to ensure familiarity with JOAG and a consistent message between the JOAG and their PAC.
2. Requirements for JOAG Liaisons to other USPHS organizations
   1. Have interest, knowledge, and experience in both organizations.
   2. Be selected with input from the leadership of the respective organization he/she will be corresponding with.
3. JOAG Liaison roles and responsibilities
   1. Attend JOAG General Member meetings and respective organization meetings.
   2. Attends check-in calls or follows up with Chair and Vice-Chair, as requested.
   3. Provide updates about their respective organization to JOAG and vice versa.
   4. Share JOAG-requested messages with their respective organization (via listserv or other methods).
   5. Share organization-requested messages with JOAG (e.g. request posting from EC liaison to distribute material to JOAG members via the listserv or other methods).
   6. Represent JOAG and act as an advocate for JOAG to respective organization.
   7. Ensure that the designated alternate (Please see JOAG Proxy/Alternate Form in the Bylaws) provides a report at a JOAG or organization meeting in the absence of the designated JOAG liaison.

## ***Section 3.*** Recusal from Applicant Scoring Policy

If you are acquainted with an officer (e.g. recognize the officer from the redacted materials; have met an officer several times) and think you could be objective in evaluating a nomination, *no need* to recuse yourself from the process.

A. If you know an officer well and therefore would not be able to score a nomination objectively, please recuse yourself from scoring that nomination*.* Voting Members are expected to score the remaining nominations and participate in the final selection process. Please note that your scores may be eliminated during the evaluation process to prevent skewing of results.

B*.* If you nominated an individual for an award, you must recuse yourself from the entire process.

C. If you have applied for an additional term as a Voting Member, you must recuse yourself from the entire VM scoring process during that selection round.

D. For any recusal, please inform the Committee Chairs spearheading the scoring efforts.

E. If you are unsure whether to recuse yourself, please discuss your personal situation with the Committee Chairs spearheading the scoring efforts.

# **ARTICLE VII**

COMMITTEE ROLES AND RESPONSIBILITIES

## ***Section 1.*** Committee Chair

The Committee Chair(s) must be a proficient meeting manager. The Committee Chair must understand the committee’s mission and objectives, plan meetings, resolve conflicts, communicate effectively, and ensure committee members follow up on assigned tasks or projects. Because committee members are volunteers with many other responsibilities, the Committee Chair should be respectful of time and keep meetings on schedule. The Chair must also guide the committee to consensus. Responsibilities of the Committee Chair include:

1. Preparing and distributing meeting agendas in advance and including agenda items that realistically fit within the allotted meeting time. This may be delegated to a Committee Secretary.
2. Involving as many committee members as possible in discussions by soliciting opinions and experiences.
3. Ensuring committee members understand expectations for assigned tasks and projects.
4. Summarizing major points or decisions.
5. Keeping discussions on subject.
6. Utilizing facts to resolve conflicts.
7. Maintaining objectivity.
8. Praising committee members and acknowledging individual and group contributions.
9. Listening to all committee members and all sides of an issue.
10. Facilitating committee meetings/conference calls to ensure optimal time utilization.
11. Ensuring individual project milestones are met and, if not, identifying the cause and rectifying the problem.
12. Assigning action items to individual committee members.
13. Communicating project progress and committee activities to the JOAG EC through the EC Liaison.
14. Providing orientation to new committee members.
15. Keeping the committee viable and productive, as outlined in Section 11, below.
16. If deployed or otherwise unable to attend to VM duties for an extended period of time (e.g. maternity or paternity leave), arrange for a POC during the absence. This may be the other Committee Co-Chair, if available, or may be delegated to another non-voting committee member, such as a Secretary. Inform the Committee and the EC Liaison.

## ***Section 2.*** Executive Committee Liaison

The EC Liaison serves as the JOAG Chair’s designee to the JOAG Committee. The roles of the EC Liaison are as follows:

1. Attends Committee meetings as needed as the EC representative.
2. Updates the JOAG Chair and EC on the progress of the Committee.
3. Communicates the EC’s recommendations to the Committee Chair and members.
4. Provides guidance on policy and procedures relevant to JOAG.
5. Advises Committee Chair and members on new and existing projects.
6. Reviews and finalizes committee-specific documents (See Sections 7, 8, and 9, below).

## ***Section 3.*** Committee Secretary

The Committee Chair is responsible for selecting a Committee Secretary. When deemed necessary or advantageous by the Chair(s), two committee members may occupy the role of Secretary and shall be assigned the title of Co-Secretaries. The Secretary of each committee is responsible for the following essential committee functions:

1. Communicate upcoming general meeting information, including agenda, meeting time, call-in information, and distribution of materials to committee members.
2. Maintain contact information for all committee members.
3. Maintain accurate records of committee member attendance.
4. Perform an attendance record review and prepare a report at least twice a year to determine attendance rates of committee members.
5. Provide general meeting attendance and recordkeeping.
6. Advise the Chair when Participants do not meet minimum standards for meeting attendance and inform such Participants that they will be listed as Inactive Participants as outlined in Article IX, Absenteeism Policy.
7. Record, store, and if appropriate, distribute meeting minutes and General Member Meeting notes to committee members.
8. Designate an alternate (co-secretary, when applicable) to fulfill his/her duties if he/she cannot attend a meeting, or at a minimum, alert the Chair well in advance of a possible absence so that another person can be assigned the responsibilities.

## ***Section 4.*** Subcommittee/Workgroup Lead

Committee Chairs may form permanent or ad-hoc Subcommittees or Workgroups within their Committee, as needed (only the EC can create Committee-level Workgroups). The lead of the subcommittee/workgroup shall be referred to as the Lead. The Committee Chair is responsible for appointing said Lead(s). Committee Chairs may solicit input from the outgoing Leads for recommended replacements.

1. *Responsibilities.* A pre-designated subcommittee/workgroup Lead will be entrusted with the responsibilities of the Committee Chair and committee Secretary as outlined above, as they pertain to the individual assigned project.
2. *Authority.* The Lead shall have the authority and responsibility to assign specific tasks and responsibilities to individual subcommittee/workgroup members as needed. Additionally, Leads will:
   1. Maintain awareness of the project timeline and ensure that goals are met and, if not, identify options to resolve the problem and meet projected goals.
   2. Communicate project progress and subcommittee or workgroup activities to the Committee Chair and to the entire committee during regular committee meetings and as needed.

## ***Section 5.*** Committee Projects

As mentioned earlier, achievement of the committee’s projects should be based on JOAG’s Strategic Plan. All committee projects should be related to the mission and goals commonly agreed upon by the committee, the JOAG Chair, and the JOAG Strategic Plan that establishes a five-year plan, which started in OY 2021. Each committee should follow the steps outlined below for each project as a guide and make sure to keep JOAG leadership apprised of the current status of each project through the committee reports. All committee members should be aware of this general process for committee projects and share responsibility for seeing projects through to completion (particularly any designated Leads for particular projects); however, ultimate responsibility for all projects that take place within the committee, even when delegated, resides with the Committee Chair(s).

1. Identify specific projects through collective committee member brainstorming, conferring with other USPHS officers and JOAG leadership.
2. Gather additional information as needed.
3. Review the committee’s need for outside assistance. Determine what assistance JOAG or other junior officers can provide (e.g., should other committees or the general membership be involved in the activity?).
   1. Create an Action Plan with timeline.
   2. Identify next steps and ultimate goal of project.
   3. Identify project lead.
   4. Identify and assign specific tasks.
   5. Establish reasonable timeline to complete tasks and discuss results.
   6. Get updates from project lead.
   7. Evaluate results and assign new tasks, if appropriate.
   8. Keep appropriate JOAG leadership apprised of project status.
   9. Ensure appropriate and timely recordkeeping for each task.
   10. Repeat steps 1 through 7 as needed, until project is completed.
   11. Include project updates in JOAG report.
   12. Ensure acknowledgement of project completion and project team members to JOAG leadership and other authorities as appropriate.

## ***Section 6.*** Committee Meeting Preparation

1. *Agenda.* The Chair prepares a written agenda with input from the committee members. Allocate sufficient time for each topic on the agenda. Items not on the agenda should be saved for new business at the end of the meeting.
2. *Date and Time.* The committee meeting date, time and location (if applicable) is designated by the Committee Chair/Co-Chairs. A change in time, date, and frequency of the call can be initiated only through the Chair/Co-Chairs, in consultation with the Secretary(ies). Every effort should be made to keep committee meetings as originally scheduled. Scheduling a bi-monthly (every other month) reoccurring meeting increases meeting attendance and participation.
3. *Notification.* The committee Secretary shall email an agenda and supporting documents to the committee in advance of the meeting; this serves as a reminder and will increase attendance.
4. *Meeting Logistics*
   1. Start and end the meeting on time. The Committee Chair should respect the committee members’ valuable time. Stick to the agenda and follow the time allotted to the agenda items.
   2. Introduce unique participants and visiting speakers (if appropriate) during the meeting. Introduce and recognize new members joining a meeting for the first time and identify them as such to the committee.
   3. The Committee Secretary should be assigned to take minutes. The meeting may be recorded to assist in the subsequent preparation of written minutes. A recorded meeting should be announced. The written minutes are the official record of the meeting. Minutes from the preceding meeting should be distributed prior to the new meeting for committee review. Records of action plans for specific projects should clearly show specific tasks and the designated committee member responsible for achieving each task.
   4. Work through the agenda. To help the committee keep track of agenda items, the Committee Chair should ask the committee members to give status reports on their progress. This report can be given in writing or verbally. Agenda items should be handled in the following order; however, the Chair can adopt, adapt, or reject these in favor of a more simplified approach as needed. Robert’s Rules may be used, as described below:
      1. Announce the item.
      2. Ask for or give a report on the item.
      3. Allow discussion.
      4. Ask for a motion.
      5. Ask for a second to the motion.
      6. Ask for any further discussion.
      7. Repeat the motion.
      8. Call for either a voice vote or a show of hands.
      9. Announce the motion for adoption or failure.
      10. If the motion fails, call for a new motion and second. Generally, there should be no discussion until a new motion is made under this circumstance, although some discussion may be necessary to form a new motion.
      11. Repeat steps a. through j. until the item is resolved and go to next item.
   5. Summarize the action items and due dates that have resulted from the meeting.
   6. Establish a date and place for the next committee meeting.
   7. Adjourn the meeting.

## ***Section 7.*** Requesting JOAG EC Review of New Committee Documents

All new committee documents must be reviewed by the JOAG EC and approved by the JOAG Chair (or designee) prior to dissemination outside of the committee or to the general JOAG membership. Note: Please refer to Section 9 of this Article for Review of Committee SOPs.

1. The Committee Chair will send a request for document review via email to the committee’s EC Liaison. The request should include all pertinent deadlines so that the EC can prioritize its review if necessary. The review time allowed will be commensurate with the length and complexity of the document.
2. The committee’s EC Liaison will review the document in its entirety before sending it to the designated Co-Executive Secretary for coordination of the full EC review.
   1. The EC Liaison may send the document back to the Committee Chair for further revision if needed.
   2. If the document does not require edits, the EC Liaison will send the document to the designated Co-Executive Secretary.
3. If further revisions of the document are requested by the EC, the committee’s EC Liaison will forward the suggested revisions to the Committee Chair via email.
4. The EC Liaison may review the final document to ensure all EC comments have been incorporated and addressed appropriately.

## ***Section 8.*** Annual Review of All Existing Committee Documents

All committee documents should be reviewed by the Committee Chair and EC Liaison at least once annually (preferably during the first quarter of the operational year). Minor revisions may be reviewed and approved by the EC Liaison. Major revisions should be reviewed by the JOAG EC and/or approved by the JOAG Chair (or designee). For major revisions, the committee’s EC Liaison will review the document in its entirety before sending it to the designated Co-Executive Secretary for coordination of the full EC review, as outlined in *Section 7.B., above. Note: Please refer to Section 9 of this Article for Review of Committee SOPs.*

## ***Section 9.*** Review of Committee SOPs

Each Committee shall strive to maintain an updated SOP by continuously reviewing and updating its respective SOP throughout the operational year.

1. *Major Changes.* Refers to new procedures or significant revisions to existing procedures. Major changes to existing committee SOP Article(s) shall be sent through the EC Liaison for initial review. The EC Liaison will then submit the updated SOP Article(s) to the Chair-Elect and Chair for approval.
2. *Minor Changes.* Minor changes to the SOP (i.e., to correct spelling or grammar or to clarify unclear wording) shall be made by the Committee with concurrence by the EC Liaison.
3. *Yearly Review.* A yearly review of each committee SOP shall be performed by the Committee, EC Liaison, and the JOAG Chair. The yearly review process shall start during the 3rd quarter, April-June, of the JOAG operational year. Committee SOPs shall be submitted first to the PPC for review of format and general content. The committee shall make revisions, if necessary, following PPC review, then submit the revised draft SOP to the Chair-Elect and Chair for review. After receipt and incorporation of edits or comments from the Chair-Elect and Chair, the SOP shall be considered final and will be posted to Max.gov.

## ***Section 10.*** Requesting JOAG Website Updates

Refer to the JOAG Communications and Publications Committee SOP for information on requesting website updates.

## ***Section 11.*** Keeping the Committee Viable and Productive

To ensure the committee is running effectively, it is important to maintain vital, contributing members on the committee. The Committee Chair and subcommittee/workgroup Leads will take the following steps:

1. Ensure committee members know the purpose of the committee and the standards to maintain Participant status. This should initially be done through timely and consistent new Participant orientation, including distribution of policies, responsibilities, and procedures of the committee.
2. Committee member assignments should be clear, specific, and achievable. The Committee Chair or subcommittee/workgroup Lead is responsible for ensuring this is done.
3. Periodic checkups or regular committee reports will keep committee members focused and productive.
4. Inquire about the interests and experiences of new volunteers to make sure volunteers are matched with the right subcommittee(s) or project(s).
5. At times, it may be necessary to address a performance issue with a committee member. If this occurs, it is important to minimize hard feelings. After all, this person is volunteering his/her time to the committee and may be better prepared and willing to do so in the future; however, for the benefit of the committee, quick action is better than waiting until the person is rotated off the committee. Use the following suggestions to start this process:
   1. Talk with the committee member. Are there outside issues affecting his/her committee involvement, e.g., pressures from a boss? Is the committee member truly interested in the activities of the committee? Can you help resolve any of the issues raised?
   2. Be up-front with the individual. Explain that because of absences or lack of follow-through, his/her involvement on the committee is not up to par.
   3. An ineffective committee member might just be on the wrong committee. Every opportunity should be made to involve a junior officer who is interested in JOAG but may have joined the wrong committee. Ask the committee member about their interest and what they hope to accomplish in the committee. If, based on the committee member’s response, another committee may be a better fit, seek out an opportunity to involve the member with that alternate committee.
   4. Before talking to the committee member, try to find a stand-alone project that he/she can handle to be put forward as a possible suggestion for involvement in the current committee or another committee that the member may assist with.

# **ARTICLE VIII**

NEW PARTICIPANT ORIENTATION/MINIMUM STANDARDS

## ***Section 1.*** Committee Participation

Committee members can participate as Participants or Observers. Members should be made aware and given the option of choosing participation status. This is especially important for new members. It is the responsibility of the Committee Chair to inform all members about the two options for involvement: Participant or Observer.

1. *Participants.* The following are the expected roles and responsibilities of all committee/workgroup Participants:
   1. Willingness and ability to give the necessary time to attend meetings and perform duties.
   2. Active participation in discussion and willingness to listen to and respect other viewpoints.
   3. To think in terms of the welfare of the group rather than personal interests.
   4. Ability to accept and follow through on assignments.
   5. Maintain minimum standards for Participants as listed below:
      1. Attending at least half of the eligible meetings since joining the Committee (See Article IX, Absenteeism Policy).
      2. Active participation in at least one project and/or subcommittee annually.
      3. Active participation in meeting discussions and providing input to the Committee Chair’s (or Co-Chairs’) solicitations.

At any time, a participant may change his/her participation from Participant to Observer by contacting the Chair, Co-Chair, and Secretary and notifying the leads for the activity that he/she was involved with.

1. *Observers.* Each committee shall encourage attendance at all meetings from any junior officer who wishes to remain abreast of current issues but does not wish to encumber the responsibilities of a Participant.
   1. A committee Observer is an officer who wishes to maintain awareness of committee issues and is under no obligation or requirement to participate, maintain a minimum level of attendance, or other responsibility.
   2. Observers are not eligible for recognition as outlined in Article XI.
   3. At any time, an Observer may change his/her participation status to Participant by contacting the Chair, Co-Chair, and Secretary and volunteering for a committee activity.

# **ARTICLE IX**

ABSENTEEISM POLICY

## ***Section 1.*** Absenteeism Policy

In accordance with Article VII Section 6 of the Bylaws, any JOAG Voting Member who frequently misses meetings, without an excused absence, in a year without just cause can at the discretion of the JOAG Chair, in concert with the EC and in consultation with the Senior Advisor, be asked to voluntarily resign from JOAG. Furthermore, the JOAG Chair, in concert with the EC and in consultation with the Senior Advisor, can initiate a request to the Office of the Surgeon General to terminate said membership and so inform the officer’s respective CPO and supervisor of termination of JOAG membership. Specifically, a Voting Member is not allowed more than 3 absences in total from the combined number of Voting Member and General Member meetings that occur during a given Operational Year. Any Voting Member who is unable to meet the attendance requirement may be considered for removal by the EC and may not be considered for a Special Assignment Award (SAA). Exceptions to this policy may be made by the EC for absences related to medical issues, deployments, or other unusual circumstances so that Voting Members are not penalized for unavoidable absences. All decisions regarding removal and non-consideration of the SAA will be made in concert with the Senior Advisor.

## ***Section 2.*** Inactive Participants

Participants who miss more than 50% of the meetings in an operational year (October through September) or since joining a committee without approved absences, such as work duties, shall be considered inactive and ineligible for the committee’s end-of-year letter of appreciation (LOA). The committee Secretary shall keep attendance of all meetings and notify the Chair if a Participant has fallen below the 50% mark. Ultimately, it is up to the Committee Chair’s discretion to determine if a Participant should receive a LOA based on their accomplishments and completion of assigned duties and tasks.

## ***Section 3.*** Notifying Inactive Participants

Active participation will be determined by the Committee Chair using the committee participation guidelines outlined above. Those Participants who fall below the 50% mark will be sent an email by the Chair or Secretary informing them of their status and asking if they would like to continue to participate in the respective committee(s). Officers who fail to reach the 50% mark may be designated as an Observer. Those officers who choose to disassociate from a committee, not respond, continue to fail to make meetings, or are designated as an Observer will not achieve the minimum recognition of a Participant as outlined above. Those officers wishing to remain an active part of a committee should provide a timely reply stating continued interest and desire to still be considered as a Participant. The officer will then be required to make the next meeting and maintain 50% attendance at all future meetings.

## ***Section 4.*** Special Considerations

These guidelines are intended to encourage at least 50% attendance at meetings; however, it is recognized that there may be individual cases that warrant special consideration (e.g., weekly scheduling conflict, extended deployment, officer in a clinical billet, etc.) where an officer is not able to make enough meetings, but substantially contributes to the committee. Therefore, the Committee Chair (or Co-Chairs) reserves the right to utilize discretion in determining whether or not an individual should be recognized as a Participant.

# **ARTICLE X**

TRANSITIONING

## ***Section 1.*** Incoming Committee Chair Preparation

Incoming Committee Chair orientation guidelines and practices should be established for the Committee Chair, should involve the outgoing Chairperson, and should include:

1. Emphasis on the importance of the position (committee members will look for ideas, leadership, and support from the Chair).
2. Discussion of all duties and responsibilities.
3. Review of the committee’s SOP.
4. Review of JOAG policy, practices, and procedures (JOAG Charter, Bylaws, General SOP, Committee-specific SOP, and Strategic Plan; available in the [JOAG Policy and Procedures Subcommittee archives](https://community.max.gov/pages/viewpage.action?pageId=961151112).
5. Review of past accomplishments and current work of the committee.
6. Review of committee member assignments.
7. Recommendations for future co-leads of subcommittees.
8. Review of standards used for accepting new committee members.
9. Identification of available resources.

## ***Section 2.*** Incoming Committee Chair Expectations

The incoming Chair is expected to:

1. Lead the committee in a professional manner.
2. Provide support and new initiatives to improve existing processes.
3. Review and suggest changes, as appropriate, to the committee’s process, with input from committee members.
4. Review and understand the JOAG Charter, Bylaws, and General SOP, Committee-specific SOP, and Strategic Plan (available in the [JOAG Policy and Procedures Subcommittee archives](https://community.max.gov/pages/viewpage.action?pageId=961151112)).
5. Review and approve assignments of committee members.
6. Develop (as needed) and plan the committee’s initiatives for the Operational Year, set appropriate timelines, and work with committee membership to achieve those goals
7. Review and approve assignments of committee members.
8. Designate new co-leads and liaisons of subcommittees/workgroups if needed.
9. Review and approve communications and criteria used for recruiting and accepting new committee members.
10. Identify and recruit new junior officers for involvement in the committee as necessary.
11. Function and act as a mentor to new subcommittee leads/liaisons as necessary.
12. Provide responsive service to committee membership and EC. Generally, will respond to inquiries by stated deadline or within 2 business days, if no deadline is stated. Committee Chair/Voting Member will notify EC Liaison regarding leave/extended leave and POC for coverage.
13. Complete committee deliverables within established timelines.
14. Notify JOAG Chair and Co-Executive Secretaries prior to the meeting if unable to attend a general member or voting member meeting.
15. Have an established Max.gov account and maintain/store all final documents on Max.gov.
16. Demonstrate accountability and provide quality work that is complete and accurate in content.
17. Demonstrate professional and positive attitude and manners in email, telephone, and face-to-face contacts.
18. Work as a team player to accomplish overall mission. Effective teamwork is displayed by using good judgment and tact when dealing with fellow officers.
19. Seek, receive, and accept constructive feedback, and take steps to proactively address feedback.

As per Article VII, Section 7 of the Bylaws, if a voting member is neglectful in their duties as a voting member, including failing to comply with the aforementioned expectations and the responsibilities outlined in Article VI of the General SOP, the JOAG Chair and the EC liaison will have a discussion with the Committee Chair/Voting Member about his/her ability to meet these obligations. If, after such discussions, the performance and/or conduct of the Voting Member does not improve, the JOAG Chair, in concert with the EC and in consultation with the Senior Advisor, shall have the option to remove or request resignation. The OSG and the officer’s respective CPO and supervisor will be notified of the officer’s dismissal or resignation from JOAG. Any voting member who is removed from his/her position as a voting member will not be eligible to receive an SAA.

## ***Section 3.*** New Participants

Every Committee Chair should conduct a “New Participant Orientation” for new Participants, similar to the one the Committee Chair received from JOAG at beginning of OY for new voting members. This orientation includes communication of Participant roles and responsibilities and the minimum standards for maintenance of good standing of committee participation as outlined in Article VIII.

## ***Section 4.*** Outgoing Committee Chair

After the duties and responsibilities of the Committee Chair have been transitioned to new leadership, the outgoing Committee Chair shall:

1. Remain available to answer questions from the new leadership when needed.
2. Provide historical perspective for decisions that were made by the committee in the past.
3. Create a basic transition document to ensure continuity of operations and push the committee mission forward.

# **ARTICLE XI**

RECOGNITION

## ***Section 1.*** Committee Participants

Junior officers who maintain the minimum standards for Participants (See Article VIII) will be acknowledged through the following methods:

1. A written letter signed by the JOAG Committee Chair/ Co-Chairs suitable for inclusion in the officer's eOPF.

Note: Voting Members do not receive written letters of appreciation and are ineligible for other JOAG awards. Unless they also participate in non-secretarial activities that support a Committee, Committee Secretaries do not receive written letters of appreciation, but are instead recognized as a group at the annual Symposium. Only in the case that a Secretary partakes in other activities that support the committee would he/she get a LOA.

* 1. Specific detail on the individual officer’s contributions should be maintained along with the impact of their contributions on the overall outcome when applicable.
  2. Each Committee should only submit one letter per qualified officer, even if an officer was involved in multiple Subcommittees/Workgroups within the Committee.

Note: An officer’s involvement on multiple subcommittees within a committee should be consolidated into one letter; multiple letters should not be written in recognition of accomplishments within one committee. Additionally, participation in activities of shorter duration or impact (e.g., attending a community service event or volunteering at the uniform inspection booth at the Symposium) would not by themselves make an officer eligible for this recognition. Instead, officers may be recognized in an alternative manner (Certificate of Appreciation).

Refer to the JOAG Awards and Membership Committee SOPs for more information on alternative methods of recognition and their use.

* 1. Eligibility for this letter, to include verification that attendance criteria were met, will be determined at the end of the operational year by the Committee Chair (exceptions to maintaining the minimum standards for Participants may be made on a case-by-case basis).

1. Approval to list role with the JOAG Committee on official CV as Participant.
2. Participants shall be differentiated from Observers in attendance rosters and in correspondence with the JOAG Chair and EC for the purposes of acknowledging their contributions to JOAG. The Participant roster will be provided to the JOAG Chair and EC when requested.

# **ARTICLE XII**

GENERAL OPERATIONS

## ***Section 1.*** JOAG Funds

## This section has been archived in appendix as JOAG is not allowed to fundraise or collect funds.

## ***Section 2.*** Conducting Surveys

With prior approval from the EC, Committee members may conduct surveys via an approved survey platform for the collection of information from JOAG general members and other interested parties. To request and conduct a survey, committees should follow these steps:

1. Committee Chair should submit a short summary of the intended purpose of the survey, via email, to their JOAG Executive Liaison and Chair-Elect to request access.
2. The summary should be limited to two pages and should include: the name of the host committee, a list of those officers who will be responsible for implementing the survey, an outline of the project, timeframe, target audience and expected outcomes.
3. The request should be accompanied by an outline of the survey, including questions to be asked.
4. A new request must be submitted for each survey to be conducted.

After approval by the EC, the Chair Elect will grant access to the committee and inform the Committee Chair of the approval. Access to the account will be limited to those identified in the request. Note: Beta testing may be conducted by allowing committee members to test the survey; however, full-launch of the survey shall not occur without EC review and approval.

1. Prior to launching the survey, the Committee Chair will inform the EC via email that the survey is ready for launch.
2. The EC will then review the final survey and send an invitation to take the survey either via the JOAG listserv or to the appropriate audience.

## ***Section 3.*** Requesting Access to the “Officer Locator Tool”

## This section has been archived in appendix as JOAG is not allowed to use the tool.

## ***Section 4.*** Max.gov Guidance and Policy

Max.gov: All voting members shall ensure they have access to Max.gov. Max.gov may be accessed via a Max.gov account (User ID & Password), PIV or CAC card, or using Agency Federated Partner Automated Login. Users with non-HHS emails should contact the max.gov help desk for assistance.

1. JOAG EC shall determine the access level (view or edit restrictions) to the “USPHS JOAG” parent page and the “JOAG General” child page. JOAG EC Co-secretaries are designated as the JOAG Max.gov liaison for each operational year. The JOAG Max.gov liaison is in charge of setting up and maintaining access (view or edit restrictions) to the “USPHS JOAG” parent page, and the “JOAG General” child page and its sub-child pages. The JOAG Max.gov liaison is also in charge of creating sub-child pages as needed by JOAG EC under the “JOAG General” child page.

The layout of “USPHS JOAG” Parent Page consists of a dark blue ribbon and a list of child pages.

* Dark blue ribbon provides easy access to information (functions like a shortcut). The ribbon shall include Journeyman Speaker Series, Meet & Greets, and other topics as determined by EC.
* List of child pages shall only include the JOAG Committees and “JOAG General”.
* The JOAG EC Secretary will be responsible for the JOAG EC page.
* Naming of JOAG Committee child pages shall be in the format of “JOAG + committee’s name + committee’s abbreviation”. For example, “JOAG Policy & Procedures Committee (PPC)”.

1. Each JOAG Committee shall determine the access level (view or edit restrictions) for their respective committee’s child page. If junior officers have issues with obtaining max.gov access, they can contact the max.gov help desk.
2. When creating a sub-child page, the sub-child page shall be named in the format of “JOAG + committee’s abbreviation + subcommittee name/relevant title”. For example: under the child page JOAG Policy & Procedures Committee (PPC),

* JOAG PPC Meeting Minutes
* JOAG PPC Letters of Appreciation
* JOAG PPC Bylaws Subcommittee
* JOAG PPC SOP Subcommittee

For additional sub-level under a sub-child page, then a “relevant title” such as years shall be included in the name.

For example, under the child page JOAG Policy & Procedures Committee (PPC):

* + JOAG PPC Meeting Minutes
    - JOAG PPC Meeting Minutes 2016-2017
    - JOAG PPC Meeting Minutes Archives
      * JOAG PPC Meeting Minutes 2014-2015
      * JOAG PPC Meeting Minutes 2015-2016
  + JOAG PPC Letters of Appreciation
    - JOAG PPC Letters of Appreciation 2016-2017
    - JOAG PPC Letters of Appreciation Archives
      * JOAG PPC Letters of Appreciation 2014-2015
      * JOAG PPC Letters of Appreciation 2015-2016
  + JOAG PPC Bylaws Subcommittee
  + JOAG PPC SOP Subcommittee

1. Any committee member with appropriate access can upload files and documents to a sub-child page.

Naming of files/documents shall include at the minimum the year of the file/document (YYYY), but date is preferred when possible (MM.DD.YYYY or MM.YYYY). Dash or underscore can be used optionally to separate month, date, and year.

For example:

* Meeting Minutes 12.1.2016.doc
* LCDR JohnSmith LOA 2017.doc
* Deployment Readiness 1\_2016.ppt (a Jan 2016 presentation from the Journeyman speaker series)

Therefore, the organization from child page to file/document is:

JOAG Policy & Procedures Committee (PPC)

* + JOAG PPC Meeting Minutes
    - JOAG PPC Meeting Minutes 2016-2017
      * Meeting Minutes 12.1.2016.doc
      * Meeting Minutes 1.1.2017.doc
      * (files of all current year meeting minutes)
    - JOAG PPC Meeting Minutes Archives
      * JOAG PPC Meeting Minutes 2014-2015
      * JOAG PPC Meeting Minutes 2015-2016
  + JOAG PPC Letters of Appreciation
    - JOAG PPC Letters of Appreciation 2016-2017
      * LCDR JohnSmith LOA 2017.doc
      * LT JohnSmith LOA 2017.doc
      * (files of all current year LOAs)
    - JOAG PPC Letters of Appreciation Archives
      * JOAG PPC Letters of Appreciation 2014-2015
      * JOAG PPC Letters of Appreciation 2015-2016
  + JOAG PPC Bylaws Subcommittee
  + JOAG PPC SOP Subcommittee

1. When to post/upload files and documents to Max.gov is at the discretion of each committee.

For example:

* One JOAG Committee may decide to post meeting minutes within seven days after a Committee meeting, vs. another JOAG Committee may choose to post meeting minutes at end of the month.

## Section 5. JOAG Listserv Posting Guidance and Policy

JOAG Listserv ([JOAG@LIST.NIH.GOV](mailto:JOAG@LIST.NIH.GOV)) ‘Policy’- Only EC members can post to the JOAG listserv. Any proposed posting must be requested to/through an EC member. Committee Co-Chairs should perform a review prior to submitting to the EC and should include a statement of clearance Refer to the **EC SOP** for more information.

# **ARTICLE XIII**

STANDARD OPERATING PROCEDURES (SOP)

## ***Section 1.*** Updates to the JOAG General SOP

The EC shall be responsible for maintaining and updating the JOAG General SOP. Updates to the SOP may be initiated as needed by the JOAG Voting Membership. Any Voting Member may request a review of the SOP or suggest a change to the SOP through correspondence with the EC. If deemed worthy of further review, such a review shall occur with drafting of new proposed language.

## ***Section 2.*** JOAG General SOP Review

The JOAG Chair-Elect (Policy & Procedures Committee Chair) will initiate the yearly review process. The JOAG General SOP shall be reviewed annually by the EC. In the event of a major update is identified, the JOAG Voting Members shall be allowed to review and comment on the changes.

## ***Section 3.*** Approval

Requires a simple majority vote of Voting Membership.

## ***Section 4.*** Minor Changes

Minor changes to the SOP (i.e., to correct spelling or grammar or to clarify unclear wording) may be made without requiring a vote.

# **APPENDIX 1: Glossary of Terms**

**Committee Chair**: JOAG Voting Member(s) responsible for leading a JOAG Committee.

**Committee**: The Committees are the organizational groups that make up JOAG. Committees are responsible for ensuring the mission and goals of JOAG are met.

**Co-Secretary**: Term used to refer to two committee members serving in the role of Committee Secretary.

**EC**: The JOAG Executive Committee. The EC is made up of the JOAG Chair, the Vice-Chair, the Chair-Elect, the two Co-Executive Secretaries, and the Operations Liaison. *(See JOAG Bylaws for EC duties).*

**EC Liaison**: Appointed by the JOAG Chair to serve as the liaison between the EC and the assigned JOAG Committee.

**JOAG Bylaws**: The JOAG Bylaws provide internal guidance for the operations and policies of JOAG. The Bylaws provide specific guidance on matters not addressed by the JOAG Charter.

**JOAG Chair**: The Chair of the Junior Officer Advisory Committee.

**JOAG Charter**: JOAG’s Charter is the governing document that establishes JOAG as an entity under the Surgeon General and defines the overall purpose and structure of JOAG.

**JOAG Committee SOPs**: The JOAG Committee SOPs provide specific internal guidance for the operations of each JOAG Committee.

**JOAG General SOP**: The JOAG General SOP provides general guidance on the operations and procedures of the JOAG Committees as related to policies addressed by the JOAG Charter and Bylaws.

**Lead**: A Participant or Voting Member responsible for leading a JOAG Subcommittee or Workgroup.

**Observer**: An officer who maintains awareness of committee issues and is under no obligation or requirement to participate, maintain a minimum level of attendance or other responsibility. (See Article VIII, Section 1.B.)

**Participant**: Member of a Committee or Workgroup who takes an active role in the activities and initiatives of the Committee/Workgroup. (See Article VIII, Section 1.A.)

**SOP**: Standard Operating Procedure

**Subcommittee**: Refers to an organizational group within a JOAG Committee.

**Workgroup**: Refers to an organizational group within a JOAG Subcommittee, or an organizational group created by the EC for a specific initiative.

# **APPENDIX 2: JOAG Funds**

## This section has been archived in appendix as JOAG is not allowed to fundraise and manage funds.

## **ARTICLE XII: General Operations**

## ***Section 1.*** JOAG Funds

1. *Requesting Funds.* Committee participants may request reimbursement for expenses that are incurred in support of JOAG related activities with prior approval of the Committee Chair and the JOAG Operations Liaison. Reimbursement is not guaranteed.
   1. Committee members must first complete and submit the Funding Request Form (FRF) (**See Appendix 2**) via email, through the requesting Committee Chair, to the JOAG Operations Liaison prior to spending any funds.
   2. Funding requests will be reviewed by the Operations Liaison, and the JOAG EC if necessary, to determine appropriateness of the request.
   3. The Committee Chair and member will be notified by email if the request was approved or declined.

It is advised that purchases are not made until **after** notification of approval by the JOAG Operations Liaison is received as reimbursement is not guaranteed. Approved requests will be sent to the Commissioned Officer Foundation (COF) administrative assistant for payment. COF will mail reimbursement checks to the name and address on the FRF. To allow ample time for processing, please submit all request(s) for funding at least two to three (2-3) weeks before the payment is needed. Although not required to be submitted with the FRF, you will need to submit a cost estimate (e.g., invoice from vendor) or a receipt before payment can be sent.

1. *Collecting & Depositing Funds*. The EC SOP covers the deposit of funds by the JOAG Operations Liaison. JOAG Voting Members other than the JOAG Operations Liaison may collect funds at activities during which COF-JOAG merchandise is sold (e.g., Officer Basic Course (OBC), career fairs, and the USPHS Scientific & Training Symposium). Assuming the JOAG Operations Liaison is not available, procedures for submitting money earned for JOAG are as follows:

**Checks**. Ensure that checks are **NOT** made out to JOAG. **Checks should be made out to COF with “JOAG” in the memo.**

***Note****: If you receive a check made out to JOAG, please contact the check writer and request that she/he submit (by mail or in-person) a new check written to COF and return to her/him the original check written to JOAG.*

**Cash**. Keep the cash and write a personal check for the amount of any cash received less the costs of sending the check with delivery verification through UPS, FedEx or USPS, if you are unable send it through your office.

**Checks should be made out to COF with “JOAG” in the memo.**

***Note****: If unable to write a check, please contact the JOAG Operations Liaison.*

Make a copy of the check(s) and email it to the JOAG Operations Liaison.

Mail the check(s) with delivery verification to:

Junior Officer Advisory Group

c/o Commissioned Officers Foundation

8201 Corporate Drive, Suite 200

Landover MD 20785

* 1. Email the JOAG Operations Liaison to notify him/her:
     1. Check(s) was sent
     2. Date of mailing
     3. Number of checks
     4. Total amount of the checks

## JOAG Funding Request Form (FRF)

Please complete this form and submit via email, through the requesting Committee Chair, to the JOAG Operations Liaison. The request will then be reviewed by the JOAG Executive Committee (EC) to determine if this is an appropriate use of JOAG funds. The Committee Chair/Member will be notified by email of the EC’s decision. It is advised that purchases are not made until **after** notification of approval by the Operations Liaison as reimbursement is not guaranteed. Approved requests will then be sent to the Commissioned Officer Foundation (COF) for payment. To allow ample time for processing, please submit all requests for funding at least 2-3 weeks (if possible) before the payment is needed. Although not required to be submitted with the FRF, you will need to submit a cost estimate (e.g., invoice from vendor) or a receipt before payment can be sent. **(The FRF in pdf form is stored on Max.gov in the Voting Members section under Forms.)**

**Date of Request: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Requesting Committee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Chair: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Requesting Member (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Amount of Funding Requested: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Please describe how the funding will be used:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Payment/Mailing Information**

**Check One:** Reimbursement/Payment to Officer \_\_\_\_\_ Payment to Vendor: \_\_\_\_\_\_

**Pay to the Order of: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Address to which check \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**should be mailed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Invoice/Order # (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**FOR JOAG OPERATIONS LIAISON ONLY: Date of Approval/Non-Approval:**

**Total Amount Approved/Reimbursed:**

**Notes:**

# **APPENDIX 3**: **Archived information on the Officer Locator Tool**

Key members of the Membership Committee will need to have access to the “Officer Locator Tool” (OLT). To request access to the OLT, the following process shall be followed:

*Note*: The OLT has not been used FY 2020 as JOAG has not been granted access. JOAG is working through CCHQ to request access to OLT and status is pending.

1. The Committee Chair shall identify the member of the committee needing access to the OLT. In addition to the Committee Chair, only one other committee member, preferably the Lead of the relevant Subcommittee shall be given access.
2. The incoming Committee Chair(s) of the Membership shall begin the request process at the beginning of the JOAG operation year and after the key Subcommittee members have been identified.
3. The Committee Chair, through the EC Liaison, shall submit the request to the JOAG Chair.
4. The JOAG Chair (or designee) will review the request. After approval has been received, the JOAG Chair shall send the [**User Registration Form** (URF)](https://dcp.psc.gov/CCMIS/PDF_docs/user_registration_form.pdf) to the requesting Committee Chair.
5. After the completed URF has been received by the JOAG Chair (or designee), the JOAG Chair (or designee) shall review and submit the completed URF to the JOAG Senior Advisor for final approval. The JOAG Chair will also submit a request to remove access from those committee members no longer active in said roles.
6. The JOAG Senior Advisor is responsible for approving the final URF and may submit to the appropriate staff at Commissioned Corps headquarters or may direct the Chair to submit. Submission is processed via email, not postal service, to [cchelpdesk@hhs.gov](mailto:cchelpdesk@hhs.gov).
7. At the beginning of each Operational Year, the list of members with access to the OLT will be reviewed by the Chairs of the Membership and R&R Committees. In the event that a committee member is no longer active or their role is unknown, the Chairs will confirm the role and necessity of OLT access for the committee member through the member’s respective or most recent Committee, or revoke access.