Contents

NARFE’s Mission Statement.............................................................................................................. 1

Section One: NARFE Members ...................................................................................................... 2
The Individual Member .................................................................................................................. 2
  What Are the Benefits of NARFE Membership? ........................................................................ 2
  Who Can Join NARFE? ................................................................................................................ 2

Section Two: Chapter Officers and Operations ............................................................................. 3
NARFE Chapters ............................................................................................................................ 3
  Duties of Chapter Officers .......................................................................................................... 3
    Chapter President ..................................................................................................................... 3
    Chapter Vice President ............................................................................................................ 3

Fig. 1: F-7 Chapter Officer Roster ................................................................................................ 4
Secretary ....................................................................................................................................... 4
Treasurer ......................................................................................................................................... 5

Fig. 2: Exempt Organizations Select Check (990-N filer info.) .................................................. 5

Other Local Chapter Officers ....................................................................................................... 6
  Legislative Chair ....................................................................................................................... 6
  NARFE-PAC Chair .................................................................................................................... 7
  Public Relations Officer ............................................................................................................. 7
  Service Officer .......................................................................................................................... 7
  Alzheimer’s Chair ...................................................................................................................... 8
  Chaplain ..................................................................................................................................... 8
  Parliamentarian .......................................................................................................................... 8
  Historian ...................................................................................................................................... 8

Records Management .................................................................................................................. 9
Election of Chapter Officers ......................................................................................................... 9
New Officers ............................................................................................................................... 9

Chapter Committees .................................................................................................................... 10
Chapter Meetings ........................................................................................................................ 11

Fig. 3: Sample Agenda ................................................................................................................ 12
  Note: Always follow the rule – “God and Country” ................................................................ 12

Organizing a New Chapter .......................................................................................................... 13

Procedures for Closing a Local Chapter ..................................................................................... 14
Procedures for Closing a Chapter Not Affiliated with a Federation ........................................ 16
Reactivating a Closed Chapter .................................................................................................... 17
Communications .......................................................................................................................... 18

NARFE Service Center/Service Officer Support ....................................................................... 18
Section Three: Federation Officers & Operations ......................... 20
  Installation of Officers ................................................................ 20
  Federation Officer Duties .......................................................... 20
    General Responsibilities .......................................................... 20
    President ............................................................................. 20
    Fig. 4: F-7A, Federation Officer Roster ..................................... 21
    Vice President ................................................................. 21
    Secretary ........................................................................... 22
    Treasurer ........................................................................... 22
    Legislative Chair ............................................................... 22
    Congressional District Leader/Senatorial Leaders ................... 23
    NARFE-PAC Coordinator ..................................................... 23
    Area/District Officer/Director ............................................. 23
    NARFE Alzheimer’s Federation Coordinator ......................... 24

Section Four: Other Information ..................................................... 25
  National Conventions ............................................................ 25
    Time and Place .................................................................... 25
    Representation ..................................................................... 25
    Delegate Roles and Expenses .............................................. 25
    Sessions, Rooms, Banquets ................................................ 26
    Convention Resolutions ....................................................... 26
  Awards .................................................................................. 26
    Citations for Distinguished Service ...................................... 27
    Chapter Anniversary Certificates ...................................... 27
  Obtaining a NARFE Banner ................................................... 27
  Charitable Contributions ........................................................ 28

Appendices .................................................................................. 29
  A-Checklist of Chapter Operations ......................................... 29
    Keeping a Chapter Active .................................................... 31
  B-Records Management .......................................................... 33
    Records Management Schedule Quick Reference Chart .......... 33
  C-Membership Prospecting, Recruiting and Retention .............. 34
    Fig. 5: Recruiting Materials .................................................. 34
    The “Elevator Speech” .......................................................... 36
  D-NARFE Chapter Charter Application ...................................... 38
  E-Audit Checklist .................................................................... 39
  F-F-38 Treasurer’s Monthly Report ......................................... 40
  G-Installation of Officers Ceremony ....................................... 41
  H-Letter of Introduction for Accessing Federal Facilities .......... 42
  I-Chart of NARFE Position Codes and OAM Access ............. 44
  J-Officer Resources on the NARFE Website ......................... 47
NARFE’s Mission Statement:

To support legislation beneficial to current and potential federal annuitants and to oppose legislation contrary to their interests.

To promote the general welfare of current and potential federal annuitants by advising them with respect to their rights under retirement laws and regulations.

To cooperate with other organizations and associations in furtherance of these general objectives.
Section One: NARFE Members

THE INDIVIDUAL MEMBER
The effectiveness of NARFE begins with the individual member. Each member is a valuable asset in building a strong and unified NARFE.

What Are the Benefits of NARFE Membership?
- Powerful representation and advocacy before Congress, the Office of Personnel Management and the White House.
- *narfe* magazine, the prime source of information and guidance on critical legislation and benefit issues.
- Members-only section of the NARFE website with up-to-date information and a Legislative Action Center.
- Access to the NARFE Federal Benefits Institute educational resources – webinars, white papers and other events.
- Access to a team of Federal Benefits Service specialists for answers to complex questions.
- Legislative eAlerts on congressional business directly affecting the federal community.
- Scholarship and disaster-relief grant qualification.
- Members-only eligibility for special discounts on products and services.

Who Can Join NARFE?
Membership is open to civilians who are or will be eligible to receive an annuity or survivor annuity from the federal retirement program of an agency of the United States government, including:

- Retirees
- Active employees
- Spouses and surviving spouses of those eligible to join NARFE
- Former employees
- A former spouse who is legally entitled to a federal survivor annuity

Potential members can join:
1. **By mail**: Fill out and return a membership application found in the F-135 brochure and in every issue of *narfe* magazine;
2. **Online**: Visit and join online at www.narfe.org; or
3. **By phone**: Call toll-free, 800-627-3394.
Section Two: Chapter Officers and Operations

NARFE CHAPTERS

Local Chapters: organized within a specific area of a state for the convenience of those members living within that area.

eNARFE Chapter: an online alternative to local chapter membership.

All chapters are encouraged to provide the “grass-roots advocacy” so critical in advancing NARFE’s mission: protecting the earned retirement benefits of all civil service annuitants − both NARFE members and nonmembers.

DUTIES OF CHAPTER OFFICERS

Officers’ duties are prescribed in chapter bylaws, or the chapter president may assign duties in accordance with applicable bylaws and NARFE policies.

If you are a chapter officer with an email address, you must accept NARFE email. Save time, expense and reduce errors by using the NARFE website. The most current versions of forms and guides may be downloaded. See Appendix J for more information.

President

- Presides* at the chapter and executive committee meetings and conducts business in an orderly, impartial manner;
- Ensures that at least a portion of chapter meetings focuses on NARFE’s mission;
- Is familiar with NARFE’s organizational structure, the National Bylaws (FH-4), the respective chapter and federation constitutions and bylaws, and policies and procedures at all levels;
- Appoints standing and special committees as needed;
- In collaboration with the Treasurer, ensures the IRS form 990N (ePostcard) is filed on the IRS website annually.
- Ensures that each officer and committee member is provided with the appropriate information to fulfill the duties of each position and follows up to ensure they are operating effectively; and ensures that all required reports are sent to the respective federation and NARFE Headquarters in a timely manner.

Vice President (Includes Executive Vice President and all other VPs)

- Presides at chapter and executive committee meetings in the absence of the president;
- May be appointed or elected to oversee specific areas of responsibility, such as legislation or membership;

*Note for presiding officers: Parliamentary rules provide a common-sense method under which an organization can base concerted action on the will of the majority, but only after reasonable discussion. The presiding officer is responsible for protecting the minority's rights, which include having the right to be heard. (The majority can usually take care of itself.) Rules should be applied so as to permit the group to achieve its major purpose: taking action to make decisions within a reasonable time.
INSTRUCTIONS:
Note: This may be submitted online at www.narfe.org/oam

1. PLEASE READ THIS ENTIRE FORM CAREFULLY BEFORE FILLING IT OUT.

2. Every office is assigned a specific code entered in the computer database in sequence to speed entry. Please do NOT change or type over titles not used by your chapter. Check box next to title if the officer listed is a new officer.

3. This form must be submitted only by one of the following chapter officers: President, 1st VP, Secretary, Secretary/Treasurer or Membership Chair.

4. All chapters are required, by January 1 of each year, to send a complete listing of all chapter officers (elected and appointed) and their chapter’s dues to the NARFE Office, their Federation President and Secretary, and/or other requesters. Chapters are encouraged to report all changes in chapter officers and chapter dues changes whenever they occur.

5. All chapter dues changes received at the National Office require the effective date of the dues change and require a minimum notice of 90 days to become fully effective.

6. All chapter officers are required to be a national and chapter member.

7. This completed and signed form should be sent for processing to: NARFE Federation and Chapter Services F-7 Unit 606 N. Washington St. Alexandria, VA 22314-1914

Chapters are encouraged to submit their changes and required annual update to NARFE online. The online system saves time and eliminates errors and is automatically sent to the federation president and secretary. This paper form should be used only by chapters that do not have computer access for this required reporting.

Figure 1: F-7, Chapter Officer Roster

- Performs other duties specified in the bylaws or as assigned by the president; and
- Assists the president in promoting NARFE’s mission.

**Secretary (or Secretary/Treasurer)**
- Records the minutes of chapter meetings;
- Maintains chapter files and preserves all permanent official documents, including the charter, constitution, bylaws and other organizational papers;
- Maintains the roster of chapter members, officers and committee chairs;
- Reports changes in officers, committee chairs and chapter dues to National Headquarters’ Federation & Chapter Services section on Form F-7 by mail or online no less than annually;
- Reports chapter dues to National Headquarters’ Federation & Chapter Services section by January 1 of each year. (Note: Headquarters needs at least 90 days’ advance notice for dues changes.);
- Maintains a list and file for each committee;
- Prepares the chapter’s general correspondence (other than correspondence that is not a particular function of another officer);
- Orders necessary supplies and forms for the chapter with Form F-18 online or by mail;
- Maintains a file for NARFE Insider and Recruitment and Retention Journal; and
- Reports member changes of address and deaths to National Headquarters using the OAM member roster online, or mailed forms. (In some chapters, this is done by the membership chair.)

**Treasurer (or Secretary/Treasurer)**

- Creates a budget for approval by the chapter membership;
- Disburses funds as directed by the president, executive committee or bylaws;
- Obtains IRS federal income tax exemption letter from the National Treasurer (Communications/Mailing Permit);
- Forwards to National Headquarters (Attn: Budget and Finance) all national dues paid to the chapter and notifies National Headquarters of all chapter dues paid by members. To update member records, Forms F-16 and F-16R Transmittal Sheets are available to send dues to National Headquarters. (The instructions should be followed exactly);
- On the rare occasion that a member’s dues renewal check is cashed, send a check for the national dues only to National Headquarters and indicate that the chapter has retained its dues.
- Receives chapter dues, which are reimbursed to the chapter by the following month for the prior month’s chapter dues;
- Deposits funds in a federally-insured financial institution and maintains an accurate, current account of all monies collected and disbursed;
- In collaboration with the President, files ePostcard 990N Form annually on the IRS website;
- Reports chapter finances at each regular meeting. (May use Form F-38, see Appendix F. No copy is required at NARFE National Headquarters.);
- Reconciles, at regular intervals, membership records and chapter dues (received from the National Secretary/Treasurer) with the chapter secretary and the membership chair or other officer assigned membership duties;
- Disburses special/dedicated (S/D) funds such as Alzheimer’s, and the

![Exempt Organizations Select Check (990-N filer information)](Figure 2: Exempt Organizations Select Check (990-N filer information))
NARFE-FEEA scholarship and disaster funds as soon as possible after collection;

- Separately accounts for disbursements of all S/D funds – regardless of their source or purpose – collected in the name of the chapter or federation;
- Records the receipt of all S/D funds and ensures that checks made payable to the chapter, but meant for the S/D funds, are correctly entered into the appropriate bank account; and
- Draws a check on the chapter or federation account in an identical amount that is payable to the entity for whom the S/D funds are intended and forwards to that entity, along with any contributors’ checks made directly payable to that organization. (Form F-38 is available to report the S/D fund activity on the “Miscellaneous [itemized]” lines under both the “Receipts” and “Disbursements” sections of the form, ensuring that there are no carry-over balances in these accounts.)

Form F-38, Treasurer’s Monthly Report (Appendix F) is available from National Headquarters’ supply office upon request. (Use Form F-18, Requisition for Printed Supplies.)

OTHER LOCAL CHAPTER OFFICERS (primarily appointed)
The officers listed below are not required, but may be considered necessary when expanding activities of the chapter.

Membership Chair
Responsible for membership recruitment, retention and reinstatement. A key resource for the Membership Chair is the “Membership Marketing Manual,” Form FH-19, available from NARFE Headquarters or the website. This officer should be familiar with the Membership Application Form F-135 and the criteria for joining.

- Create, implement, monitor, document and manage membership development plans and materials for the chapter to recruit and retain members, and encourage former members to rejoin;
- Increase public awareness of NARFE;
- Work with other chapter officers to ensure chapter activities and programs are informative and varied to include programs of interest to all members;
- Engage chapter members in recruitment plans and foster greater involvement; and
- Forward names and addresses of prospective members to the NARFE Recruitment and Retention Section.

Legislative Chair
Serves as the liaison between chapter members, federation leadership, elected officials and NARFE’s Legislative Department, providing expertise and direction for members, motivating them and coordinating effective grass-roots action at the chapter level (NARFE’s Legislative Officer and Congressional District Leader (CDL) Manual, Form FH-7, provides additional guidance and can be obtained from National Headquarters or NARFE’s website, www.narfe.org).

- Provides legislative updates to NARFE members at chapter meetings and through newsletters;
- Builds relationships with members of Congress and their staffs;
NARFE Chapter and Federation Officers Manual

- Keeps up to date on Capitol Hill and Protect America’s Heartbeat activities;
- Is familiar with NARFE’s Legislative Program and positions on pending legislation;
- Prepares grass-roots activities in which NARFE members can participate; and
- Works with CDL, Federation Legislative Chair and fellow legislative officers in the district to plan joint events.

**NARFE-PAC Chair**
leads chapter efforts to promote NARFE-PAC, the Association’s political action committee, such as:
- Educates chapter members on the importance of NARFE-PAC;
- Encourages and solicits members’ contributions;
- Assists Federation NARFE-PAC Coordinators in providing state recommendations for contributing NARFE-PAC funds to candidates in their respective district; and
- Shares contribution and disbursement information with chapter members.

NARFE’s NARFE-PAC Toolkit provides guidance and can be obtained from the Legislative Department or from the NARFE website.

**Public Relations Officer**
Sets public relations agenda for the chapter. (NARFE’s Public Relations Handbook, Form FH-9, provides guidance and can be obtained from National Headquarters);
- Publicizes national and state legislative programs supported by NARFE;
- Provides the local press, television and radio with factual information concerning NARFE positions on current issues;
- Ensures that chapter officers are up to date on issues affecting members; and
- Coordinates with the chapter president visits by elected officials and candidates for public office, and other public relations programs scheduled for chapter meetings.

Note: In some chapters, the public relations officer also serves as editor of the chapter newsletter.

**Service Officer**
- Assists chapter members by providing information, answering questions and offering guidance in navigating issues relating to federal pay and benefits, (*Service Officer Guide*, FH-10, is available from National Headquarters), such as:
  a. Procedures governing delivery of annuity checks;
  b. Life insurance and health benefits;
  c. Survivor benefits;
  d. Change-of-beneficiary procedures;

---

**BE PREPARED FOR LIFE’S EVENTS**

What Your Survivors Should Know

The purpose of this guide is to help your organize your personal and financial information in one location so your survivors will have the information they will need to handle your affairs upon your death. While one’s death is a difficult topic to discuss, reviewing this information with your family will help them to understand the steps they will need to take. Any questions that come up also can be addressed. You should ensure that your family members review this guide with you and know where it is located. You also should review this guide periodically to ensure that the information is up-to-date.

BE PREPARED FOR LIFE’S EVENTS

Date this document was prepared: ________________

F-100 (03-10)

NARFE

NOTE: This booklet contains your private and personally identifiable information. Please keep it in a secure location.

narfe magazine
e. Death benefits;
f. State and federal income taxes;
g. Social Security requirements;

- Assists members to prepare documents associated with the above topics. (Provide the F-100, Be Prepared for Life’s Events, to assist members in managing their affairs); and
- Keeps up to date by reading benefits-related articles in narfe magazine and NARFE Insider.

**Alzheimer’s Chair**
- Receive monthly contributions from chapter members and/or chapter fundraising events. As a Special/Dedicated fund, contributions should not be mixed with dues income. All donations should be forwarded to the Federation Coordinator at least monthly and include the chapter number. See Form FH-12 for details on the program.
- Encourage chapter members to help set the chapter fundraising goal.
- Support and participate in federation and national fundraising efforts.
- Give a brief report on any new Alzheimer’s news releases.
- Plan to have an Alzheimer’s speaker/program for your November chapter meeting for Alzheimer’s Month. Consider planning a quick and fun fundraiser for the same month.
- Write an article for your chapter newsletter. List the chapter goal and where you are in reaching that goal.
- Encourage member participation in planning and conducting fundraising events to be held throughout the year (raffles, 50-50’s, etc.).
- Cooperate with the chapter public relations officer in attracting media attention to the chapter’s Alzheimer’s fundraising and volunteering efforts.
- Stress to the membership the importance of making their Alzheimer’s contributions through their chapter to make it a win-win situation for all involved!

**Chaplain**
- Provides messages and counseling when necessary and during appropriate occasions.

**Parliamentarian**
- Should be familiar with Robert’s Rules of Order, Newly Revised edition;
- Assists the chair in following correct procedures for conducting meetings, and advises the chair on points of order and questions before the chair; and
- Advises the chair of proceedings that may adversely affect the substantive rights of any member, or otherwise do harm.

**Historian**
- Prepares and maintains an account of significant chapter activities during term of office (includes selected items from the minutes and all other substantial events);
Combines the approved historical account with previous accounts, and passes the accumulated history to his/her successor or the chapter president; and

Upon the expiration of his/her term of office, updated chapter activities are submitted for approval as part of the chapter’s official history.

RECORDS MANAGEMENT
Chapters should maintain active current files as well as archived files in accordance with chapter bylaws. Records should be well-organized and kept for a specified period of time and purged periodically. (See Appendix B, Records Management and Quick Reference Chart.)

ELECTION OF CHAPTER OFFICERS
Elections must be conducted in accordance with the chapter bylaws. If there is a nominating committee, it must submit recommendations at the meeting set by the bylaws or by the president, if there is no such provision. Note: The presiding officer must always provide ample opportunity for additional nominations from the floor.

Installation of Officers
We suggest that the person conducting the installation of chapter officers be a federation, area/district or other officer, the outgoing chapter president or the immediate past chapter president. If a national officer or regional vice president is in attendance, then either can perform the installation. See Appendix G, Installation of Officers Ceremony.

NEW OFFICERS
It is recommended that chapter elections be conducted at the same time of year throughout the Association. For example, it should specify in the chapter bylaws that those officers who are installed in December would serve from January 1 through the end of the one-, two- or three-year term of office. The exception to this recommendation is for chapter officers who serve the same year – fiscal or calendar – as federation officers.

After elections, outgoing officers should provide all pertinent information to their successors with information pertaining to the duties and functions of their respective offices. At the end of a term of office, all official files, materials and supplies pertinent to an outgoing officer’s function should be promptly transferred to his/her successor.

New officers should be installed with an appropriate ceremony and in accordance with the bylaws. Shortly after assuming office, the new executive committee and all appointed officers should meet to discuss and determine the chapter’s plan of action for the coming year. Shortly after assuming office, the new executive committee and all appointed officers should meet to discuss and determine the chapter’s plan of action for the coming year.
CHAPTER COMMITTEES

Nominating
Appointed, or elected, as the bylaws provide, a nominating committee should be established, and begin to function, well before the date set for elections, in order to provide sufficient time to identify willing candidates. At the designated meeting, the committee submits nominations for each elective office.

Executive
This committee generally consists of the elected officers and appointed committee chairs. To provide continuity, it also may include the immediate past president. It should establish routine meeting times in order to develop programs and to agree on those issues to be presented before the membership for consideration. The executive committee is responsible for developing the chapter’s plan of action and supporting activities.

Membership
This committee is responsible for developing a strategic plan for the prospecting and recruitment of eligible candidates for NARFE membership and the retention of current members.

A membership plan should include goals and objectives with desired outcomes, volunteers needed for successful implementation, funds required for inclusion in the budget and a tracking system for measuring results. A well-designed membership strategic plan is key and may provide the cornerstone for growing a chapter, and keeping it active and viable in pursuing NARFE’s mission. The agreed-upon plan should be brought before the chapter membership for approval.

The federation membership chair can offer assistance when necessary.

Note: If a public relations committee is not appointed, the membership committee can be responsible for publicizing NARFE as well as NARFE-related chapter activities.

Legislative
This committee is responsible for leading the grass-roots advocacy efforts within a chapter. Its mission is to keep chapter members informed and updated on local, state and national legislation that may affect the federal community. The committee should coordinate efforts with the federation and National Headquarters’ Legislative Department in order to: 1) influence and expedite favorable legislation and regulations; and 2) oppose and defeat unfavorable legislation and regulations. The committee should report to chapter members, federation officers and national officers on favorable or unfavorable progress or developments as they occur.

Public Relations
This committee is usually chaired by the chapter’s public relations officer. Guidance for this committee is provided in the FH-9, Public Relations Handbook, available from National Headquarters.

Program
This committee plans and provides suggestions and recommendations to the members for a
speaker or program to be featured periodically at chapter meetings. **Suggestions:** Presentations by an elected government official or candidate; a medical or health practitioner; a financial or insurance industry expert; an attorney to discuss wills, taxes, trusts, powers of attorney, etc; a local historian; travel films from the public library; or entertainment from a local theater or musical group.

In inviting politicians to speak, chapters must remember that NARFE is a political, but nonpartisan organization. Incumbent elected officials may be invited to speak without regard to political party affiliation, but should be instructed to speak only on the current issues, not as candidates.

If, during an election campaign, a nonincumbent candidate is invited to speak, then all other candidates for the same office should be invited to speak. During election campaigns, debates among candidates are good ways to stimulate member interest and attendance.

**Sunshine**
This committee maintains contact with chapter members who are celebrating birthdays, anniversaries, achievements, etc. It also maintains contact with those members who are ill or otherwise confined, and coordinates with the service officer on issues affecting a member or the member’s family.

**Social**
This committee schedules and oversees special events, such as picnics, special dinners, happy hours, fellowship circles or other group activities.

**Member Communications**
This committee contacts members to notify them about regular and/or special meetings; provides updates on legislative developments; offers reminders about renewing memberships; and responds to other needs. The chair should inform the sunshine committee of any member’s illness or other issues discovered during contact.

**Audit**
This committee should ensure that a chapter fiscal-year audit is performed annually of the treasurer’s records and chapter funds. Its report should go to the president and executive committee and be brought before the members. If an audit reflects any discrepancy, the executive committee (minus the treasurer) should determine the cause and correct it.

**Ways and Means**
This committee initiates programs to raise funds for: 1) delegates’ expenses for federation and national conventions; 2) charitable contributions; 3) scholarship awards; 4) social functions; and 5) other chapter projects not included in accountable annual income.

**CHAPTER MEETINGS**
Monthly meetings are preferable, but not required. If possible, choose a permanent meeting place. However, if a permanent meeting place is not available, the membership should be given sufficient
notice of meeting logistics in order to maximize attendance. Notify members of meeting time, date and location via telephone, email and/or newsletter notice.

A United States flag should be properly displayed at each meeting. The chapter’s NARFE banner – if available – should also be displayed. Unless otherwise provided in the chapter bylaws, the following is a suggested order of business for a 75-minute meeting. (Note: Keeping a meeting focused, and shorter rather than longer, may encourage members to attend and stay engaged in chapter activities.):

**Suggested Order of Business for Chapter Meetings**
The following suggested order of business for a 75-minute meeting was created by Lea Zajac, California Federation of Chapters.

**Opening: 5 minutes**
(Moment of silence, Pledge of Allegiance, welcoming remarks)

**Introductions: 3 minutes**
(Special guests, new members, members attending for the first time or first time in several months)

**Minutes of previous meeting: 5 minutes**
(Brief reading of the minutes of previous meeting; or if printed/distributed, a motion to approve as written or amended)

**Treasurer’s report: 3 minutes**
(Brief status of income and expenditures report. Report of any upcoming expenditures)

**Committee/Officers’ reports: 29-30 minutes**
- **Legislation** – National and state update and actions recommended
- **Membership** – Review of Online Activities Module (OAM) chapter report by category. Report of membership activities undertaken by the chapter
- **Service** – Review of activities and service to chapter members
- **Public Relations** – Review of outreach activities
- **NARFE-PAC** – Status of contributions from members and report of funds distributed to members of respective state congressional delegation
- **Alzheimer’s** – Status of national, state and chapter contributions. Report of activities to raise funds for Alzheimer’s
- **Sunshine** – Announcement of members celebrating special occasions or who are experiencing health issues
- **Hospitality** – Announcement of upcoming social events

**Program and/or guest speaker: 20 minutes** (This portion should alternate between outside interests as determined by the membership and NARFE-related business – keeping in mind NARFE’s mission, particularly the importance of legislation and membership)

**Figure 3: Sample Agenda**

**Note: Always follow the rule – “God and Country”**

Some chapters confuse which of these two should come first. Following the rule of thumb “God and Country,” the invocation or a moment of silence always precedes the pledge. The president or the members may alter the order of business for a specific meeting to meet special circumstances; for example, if the guest speaker has to leave early.
Unfinished Business: 4 minutes  
New Business: 4 minutes  
Good of the Order*: 2 minutes  
Adjournment

ORGANIZING A NEW CHAPTER

A minimum of five NARFE members or eligible members – in cooperation with the federation president – may apply to form a new chapter. Nonmembers who wish to be charter members must join NARFE no later than the date of the charter application. While the minimum is five, every effort should be made to recruit a higher number of charter members.

The group wishing to file for a charter must apply through the federation president. The federation president will determine whether or not forming a new chapter in the area would be beneficial to the members and NARFE’s mission and vision for the future. The federation president will determine which ZIP codes will be assigned to the new chapter.

If it is determined that the creation of a new chapter would be beneficial, a meeting should be arranged by the federation president with the respective federation area/district officer or other representative to assist the new chapter. A new-chapter kit may be ordered from Federation & Chapter Services at National Headquarters by calling 703-838-7760 or emailing fedchpsrvcs@narfe.org.

The federation representative should assist: a) in contacting prospective members among known federal active and retired employees, NARFE members and their spouses; and b) set a date, time and place for an initial meeting to elect officers and to assist in completing and submitting chapter charter application forms.

Essential officers for a chapter are: president, secretary and treasurer, or secretary/treasurer if a combined office is preferred or necessary. Subsequent formal elections should be held in accordance with the approved constitution and bylaws.

The federation representative should assist the secretary or secretary/treasurer in collecting dues, both national and chapter, and in remitting all national and chapter dues to National Headquarters with form F-16 or form F-16R.

On receipt of the initial organization papers, Federation & Chapter Services will assign a chapter number to the new entity. Before a charter can be issued, however, the chapter must have furnished to Federation & Chapter Services:

1. A Charter Application, form F-19, listing the charter applicants and the ZIP codes authorized by the federation president (see Appendix D);

*The Good of the Order is the last item in a meeting agenda before adjournment. It includes announcements, credits and recognition (if any). Ask once and once only – "Is there anything for the Good of the Order?" If no one rises, or only one member rises to speak, after he or she is finished, briefly scan the audience. If no one else rises to speak, then the chair can declare that the meeting is adjourned.
2. A form F-7 roster with each officer’s name, address, email address and telephone number. It also must include a meeting place and time, and annual dues amount;

3. Transmittal sheet (forms F-16 and F-16R) with all membership applications and renewals, and checks for all national and chapter dues;* and

4. A chapter constitution and chapter bylaws, form F-21, signed and dated by the chapter secretary for final approval at National Headquarters.

Note: Questions relating to ZIP code assignments and chapter’s Logistical Support Area (LSA) should be sent to National Headquarters’ Federation & Chapter Services section. Assignment of ZIP codes to a chapter’s LSA is the responsibility of the federation president.

PROCEDURES FOR CLOSING A LOCAL CHAPTER

Federation officials are expected to work with all chapters within their jurisdiction to ensure chapters are active and to assist in improving their viability. As NARFE evolves, however, local chapters likely will close. Lack of leadership or the same leaders serving continuously for many years is the most frequent reason for closure.

Local chapters also are vulnerable to environmental and generational issues. Once it appears that a local chapter is no longer viable and there is an increased risk of losing members, it is imperative that the following actions be taken:

1. Chapter and/or federation officials should discuss and explore all efforts and/or alternatives for re-invigorating a local chapter. (This can be accomplished by holding a meeting or a conference call or via email/text message.) When solutions for saving the chapter no longer appear to be viable, then procedures for closing it should commence.

2. Chapter and/or federation officials should notify chapter members by mail or email of the pending chapter closure and the options available to the members in order to continue their membership through another local chapter, the eChapter or a chapter of their choice. Although notification by mail or email is preferable, the procedure for notification must follow current chapter bylaws. All methods of notification should include sufficient time for members to communicate their choice of a transfer option.

3. If chapter bylaws require that meetings be held with a quorum of attendees, this information should be included in the notification with the date, time and purpose of the meeting. Once the meeting is called to order, if the number of attendees does not meet the minimum required to vote for the chapter’s closing, then a vote should be taken to waive the chapter bylaws.

4. At the conclusion of the meeting, or once the deadline for response from members has passed and the final decision for closure has been confirmed, the federation president will ensure that

*The charter for a new NARFE chapter should list chapter members and elected officers. Once the charter is received, the following steps should be taken:

a) Forms F-16 and F-16R with membership applications and renewals and the proper dues, should be sent to Member Records; and

b) The chapter secretary (secretary/treasurer) should process form SS-4, "Application for Employer Identification Number," furnished with the welcoming letter.
the steps outlined below are taken.

The closing chapter’s officials must ensure that the procedures listed below are implemented to officially close a chapter. If the chapter officials are unable to complete the process for closing, then federation officials must complete the process:

**Member and Chapter Notification**

- All members, including voting and nonvoting, being transferred (both automatically or by choice) must be notified of (a) the name and number of their new chapter; and (b) the name, phone number and email address, if available, of the new chapter’s president.
- National Only members should be transferred to the LSA of the chapter nearest to where they reside or to the chapter of their choice, including the eChapter.
- Members residing outside the chapter’s ZIP code may be transferred to the chapter nearest to where they reside or to the chapter of their choice, including the eChapter.
- Receiving chapters must be given a list of transferred members (including street address, phone number and email address). The new chapter’s leadership should contact the transferred members to welcome them to the chapter and invite them to participate, if they so desire.

**Closing Financial Records**

- All outstanding financial obligations must be met prior to official closing.
- Any funds remaining after the chapter has met all outstanding financial obligations should be forwarded to the receiving chapter(s) on a pro rata basis. (Sufficient funds to cover per capita rates is required.)
- If there are funds remaining after the above transactions have taken place, they must be forwarded to National Headquarters. Chapter bank account(s) must be closed.
- If the closing chapter is incorporated within its state, the Secretary of State must be notified of the closing once all funds have been appropriately distributed.
- The Internal Revenue Service must be notified of the chapter closing by completing ePostcard 990-N, which chapters are required to submit annually.

**Federation President Follow-Up:**

- The federation president must submit a report confirming closure of the chapter to Federation & Chapter Services at NARFE National Headquarters, along with a list of members and the chapter(s) to which they are being transferred. Additionally, the federation president must notify the respective regional vice president of the closing.
- The federation must reassign the closing chapter’s ZIP codes to (an)other chapter(s) and complete the F-46, “LSA Assignments Form,” and forward it to Headquarters.
- If available, the closed chapter’s charter should be returned to Headquarters.
PROCEDURES FOR CLOSING A CHAPTER NOT AFFILIATED WITH A FEDERATION

There are several chapters throughout the country that have made the decision to operate independently from their respective federations. The federations have no direct oversight responsibility for these chapters, and these chapters are exempt from federation activities. A nonaffiliated chapter may opt to close for the same reasons that a chapter that is affiliated with a federation does. Once an independent chapter has made the decision to close, the chapter leadership should notify the RVP who has jurisdiction over the region in which the chapter is located.

Once the RVP has determined that the chapter is in jeopardy of closing and there is an increased risk of losing members, it is imperative that the following actions be taken:

1. The RVP and chapter leadership should discuss and explore all efforts and/or alternatives for re-invigorating the chapter. (This can be accomplished by holding a meeting or a conference call or via email/text message). When solutions for saving the chapter no longer appear to be viable, then procedures for closing it should commence.

2. The RVP and chapter leadership should notify chapter members by mail or email of the pending chapter closure and the options available to the members to continue their membership through another local chapter, an eChapter or a chapter of their choice. Although notification by mail or email is preferable, the procedure notification must follow current chapter bylaws. All methods of notification should include sufficient time for members to communicate their choice of a transfer option.

3. If chapter bylaws require that meetings be held with a quorum of attendees, this information should be included in the notification with the date, time and purpose of the meeting. Once the meeting is called to order, and the number of attendees does not meet the minimum required to vote for the chapter’s closing, a vote should be taken to waive the chapter bylaws.

4. At the conclusion of the meeting, or once the deadline for response from members has passed and the final decision for closure has been confirmed, the RVP must ensure that the steps outlined below are taken.

If chapter officials are unable to complete the process for officially closing a chapter, the RVP must complete the process.

Member and Chapter Notification

- All members, including voting and nonvoting, being transferred (both automatically or by choice) must be notified of (a) the name and number of their new chapter; and (b) the name, phone number and email address, if available, of the new chapter’s president.
- National Only members should be transferred to the LSA of the chapter of their choice, including an eChapter.
- Members residing outside the chapter’s ZIP code may be transferred to the chapter nearest to where they reside or to the chapter of their choice, including an eChapter.
- Receiving chapters must be given a list of transferred members (including street address, phone number and email address). The new chapter’s leadership should contact the transferred members to welcome them to the chapter and invite them to participate, if they so desire.
Closing Financial Records

- All outstanding financial obligations must be met prior to official closing.
- Any funds remaining after the chapter has met all outstanding financial obligations should be forwarded to the receiving chapter(s) on a pro rata basis. (Sufficient funds to cover per capita rates are required.)
- If there are funds remaining after the above transactions have taken place, they must be forwarded to National Headquarters. Chapter bank account(s) must be closed.
- If the closing chapter is incorporated within its state, the Secretary of State must be notified of the closing once all funds have been appropriately distributed.
- The Internal Revenue Service must be notified of the chapter closing by completing ePostcard 990-N, which chapters are required to submit annually.

Regional Vice President Follow-Up

- The RVP must submit a report confirming closure of the chapter to Federation & Chapter Services at NARFE National Headquarters, along with a list of members and the chapter(s) to which they are being transferred. Additionally, the RVP must notify the federation president of the closing.
- The RVP must reassign the closing chapter’s ZIP codes to other chapter(s) and complete the F-46, “LSA Assignments Form,” and forward to Headquarters.
- If available, the closed chapter’s charter should be returned to Headquarters.

REACTIVATING A CLOSED CHAPTER

To reactivate a closed chapter, the federation president should make the request to the National Headquarters’ Federation & Chapter Services. The original charter may be used, if still available, or it can be reconstructed if supporting records are sufficient. A new charter can be issued, showing current officers and new charter members, using either the old charter number or a new number.

The federation president will determine whether or not any money belonging to the closed chapter is in escrow, and – if so – send it to the treasurer of the reactivated chapter.

Before the reactivated chapter’s charter is issued or reconstructed, the chapter must ensure that the following has been sent to Federation & Chapter Services:

- A form F-19 Charter Application, listing the ZIP codes assigned by the federation president;
- A Chapter Officer Roster – form F-7 – giving the name, membership number, address, email address and telephone number of each officer and committee chair. Include also the meeting date, time and place, and annual dues amount;
- A copy of the chapter constitution and bylaws, form F-21, signed and dated by the secretary or secretary/treasurer;
- Transmittal sheets forms (F-16 and F-16R) accompanied by all membership applications and membership renewals, together with the proper dues amount for combined national and chapter dues.
COMMUNICATIONS

Chapter Website
All NARFE Chapters should have and maintain a website. Through the Online Activities Module (OAM), NARFE provides webhosting services and website templates for chapters and federations. Whether you have a simple webpage or create a website with multiple pages, it is critical that the information on your site be current and accurate, so it is important that administration of the website is shared with the appropriate volunteers.

Please visit www.narfe.org/guide for guidelines and information on NARFE webhosting.

Chapter Newsletter
An editor, and perhaps an assistant editor, should be appointed to publish a periodic chapter newsletter.

A chapter newsletter is one of the most effective means of keeping chapter members informed. It is particularly important to members who are unable to attend meetings regularly, but want to maintain an interest in chapter activities. The newsletter can be distributed by U.S. Postal Service mail service, email (such as the NARFE Email System) or both.

If necessary, the public relations committee chair may be appointed editor. In any event, the newsletter editor should work closely with all officers and committee chairs.

Stationery
Official chapter stationery adds credibility to correspondence. Letterhead designed for chapters is available from National Headquarters (see Form F-18 under “Supplies” “Chapter Letterhead”), or it can be downloaded from the NARFE website’s “Officer Resources” page.

Mailing permit
NARFE is a nonprofit organization. Chapters and federations may obtain a nonprofit mail (bulk mailing) permit for 200 pieces or more, including a newsletter. The IRS letter stating NARFE’s nonprofit status must be presented to the USPS when applying for a permit, and may be obtained from the National Secretary/Treasurer’s office. The local post office can provide the necessary forms and instructions. Ask for postal rules and regulations concerning mailings or classes governing permissible use and how to prepare mail for acceptance. Penalties are severe for using the nonprofit permit for profit-making organizations’ purposes.

NARFE SERVICE CENTER/SERVICE OFFICER SUPPORT
NARFE’s Federal Benefits Service Department is available to provide support to federation and chapter service officers, as well as service offices located within an installation, municipal center, federal building or private facility. Both service officers and service centers provide active and retired federal employees with information to assist with issues relating to: death benefits, Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) retirement benefits, Medicare, Federal Employees’ Group Life Insurance (FEGLI), Federal Employees Health
Benefits Program (FEHBP) and other matters important to annuitants and survivors. All contacts are treated confidentially. (Note: Volunteers at service centers are not authorized to provide pre-retirement counseling, financial or legal advice to current employees or their dependents.)

The Federal Benefits Service Department keeps a current list of active service centers and should be contacted whenever a service center is opened, closed or has moved to a new location. Contact the department at 703-838-7760 or email fedbenefits@narfe.org.
Section III: Federation Officers & Operations

INSTALLATION OF OFFICERS
We suggest that the person conducting the installation of federation officers be a National Officer, the regional vice president (RVP), the outgoing federation president or the immediate past federation president. The installation oath is located in Appendix G.

FEDERATION OFFICER DUTIES

General Responsibilities
❖ First and foremost, promote NARFE’s mission and vision;
❖ Know the National Bylaws (FH-4) and the respective federation bylaws;
❖ Participate in federation meetings and conventions, area/district and chapter meetings in accordance with federation bylaws;
❖ Serve as liaison to National Headquarters, National Executive Board (NEB) and respective regional vice president in promoting chapter/federation successes and identifying, analyzing and resolving chapter/federation issues;
❖ Oversee the process of chartering new chapters (see pages 13 and 14), and assist them in becoming effective, viable and strong;
❖ Whenever possible, assist in reviving and strengthening faltering or inactive chapters; and
❖ Support and implement the policies and programs of the federation and the National Executive Board.

If you are a federation officer with an email address, you must accept NARFE email.

Federation officers’ duties listed below are provided for guidance only. Federation bylaws prescribe specific duties and should be followed.

President
❖ Acts as the chief executive and director of federation activities and programs that promote the mission of NARFE;
❖ Presides at federation conventions and meetings of the federation executive board;
❖ Appoints officers and committee chairs who (though they are not required by the constitution or bylaws) carry out the functions of the federation;
❖ Assigns ZIP codes for each chapter in the federation, using form F-46;
❖ Signs all checks drawn on federation funds, subject to the restrictions set by the executive board or federation bylaws;
❖ Ensures that all actions by the respective federation are carried out and all information and updates are forwarded to all chapters;
❖ Ensures that all federation reports are promptly completed and forwarded to National Head-
quarters and the respective regional vice presidents; and

- In collaboration with the Treasurer, ensures the IRS 990N Form (ePostcard) is filed on the IRS website annually.

- Ensures that all required federation reports and information pertaining to the management of a federation, particularly form F-7A, Federation Officer Roster, are forwarded to National Headquarters.

---

**NARFE Federation Officer Roster**

For the state of _______________ 20__ to 20__

Federations are encouraged to submit their changes and required annual update to NARFE online. The online system saves time and eliminates errors. This paper form should be used only by federations that do not have computer access for this required reporting.

<table>
<thead>
<tr>
<th>Position</th>
<th>State/Local</th>
<th>National</th>
<th>Vacant</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>20A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>1st Vice President</td>
<td>21A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>2nd Vice President</td>
<td>22A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>3rd Vice President</td>
<td>22B</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>4th Vice President</td>
<td>22C</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>5th Vice President</td>
<td>22D</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Secretary</td>
<td>23A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Treasurer</td>
<td>24A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Legislative Chair</td>
<td>25A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Legislative Chair</td>
<td>26A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Legislative Chair</td>
<td>27A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Legislative Chair</td>
<td>28A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Legislative Chair</td>
<td>29A</td>
<td>New</td>
<td>No change</td>
</tr>
<tr>
<td>Public Relations Officer</td>
<td>31A</td>
<td>New</td>
<td>No change</td>
</tr>
</tbody>
</table>

Submit this completed form to:
NARFE, Attn: Federation and Chapter Services
606 N. Washington St., Alexandria, VA 22314-1914

---

**Vice President** (Includes Executive Vice President and all other VPs)

- Performs duties assigned by the president and presides over federation meetings in the president’s absence;

- May be elected or appointed as the oversight officer for specific assignments, such as legislation or membership; and

---

Figure 4: F-7A, Federation Officer Roster
Performs presidential functions if the office of the president is vacant, and continues in this role until the vacancy is filled.

**Secretary**
- Records minutes of all proceedings and maintains records of the federation executive board and conventions;
- Maintains federation executive board records and documents;
- Provides National Headquarters with an up-to-date form F-7A, Federation Officer Roster, whenever changes occur; and
- Completes form F-22, Federation Convention Report, immediately after a federation convention and promptly sends, with appropriate attachments, to National Headquarters.

**Treasurer**
- Receives and manages all federation funds. (If the treasurer does not have the IRS Federal Income Tax Exemption Letter, it can be obtained from the National Secretary/Treasurer);
- Keeps accurate, current records of all federation funds received and paid out;
- Deposits funds in a federally insured financial institution with executive board approval, or as specified in the bylaws;
- Draws checks against federation funds as authorized by the executive board or federation bylaws;
- In collaboration with the President, files ePostcard 990N Form annually on the IRS website* (see Fig. 2 on page 5);
- Submits a full financial report at each federation convention, but no less than annually. (A copy also should be sent to the National Secretary/Treasurer); and
- Performs other duties as assigned by the president.

**Legislative Chair**
Serves as the liaison between chapter legislative chairs, CDLs, federation leadership, elected officials and NARFE’s Legislative Department, providing expertise and direction for members, motivating them and coordinating effective grass-roots action at the federation level (NARFE’s Legislative Officer and Congressional District Leader (CDL) Manual, Form FH-7, provides additional guidance and can be obtained from National Headquarters).
- Provides legislative updates to NARFE members at federation meetings and through newsletters;
- Builds relationships with members of Congress and their staffs, in conjunction with chapter chairs and CDLs;
- Keeps up to date on Capitol Hill and Protect America’s Heartbeat activities;

* The IRS Form 990-N is filed electronically via the Internet and is required for nonprofit organizations that have annual gross receipts of $50,000 or less. For instructions on how to file the 990-N, go to https://www.irs.gov/charities-non-profits/irs-form-990-n-e-postcard-user-guide.
Is familiar with NARFE’s Legislative Program and positions on pending legislation;
Prepares and carries out grass-roots activities in which NARFE members can participate;
Acts as primary point of contact for senators’ offices if federation does not have Senatorial Leaders; and
Works with CDLs and Chapter Legislative Chairs to make sure they have the resources necessary to be successful.

**Congressional District Leader/Senatorial Leader**
Serves as the liaison between chapter legislative chairs, federation leadership, elected officials and NARFE’s Legislative Department, providing expertise and direction for members, motivating them and coordinating effective grass-roots action for a specific congressional district (NARFE’s Legislative Officer and Congressional District Leader (CDL) Manual, Form FH-7, provides additional guidance and can be obtained from National Headquarters).

- Provides legislative updates to NARFE members at federation meetings and through newsletters;
- Serves as the main point of contact for the members of Congress and his or her staff representing that congressional district;
- Builds and maintains a relationship with the member of Congress and his or her staff who represents the district;
- Keeps up to date on Capitol Hill and Protect America’s Heartbeat activities;
- Is familiar with NARFE’s Legislative Program and positions on pending legislation;
- Prepares grass-roots activities in which NARFE members can participate; and
- Works with Chapter Legislative Chairs in the congressional district to make sure they have the resources necessary to be successful.

**NARFE-PAC Coordinator**
Leads federation efforts to promote NARFE-PAC, the Association’s political action committee, such as:

- Educates members on the importance of NARFE-PAC;
- Encourages and solicits members’ contributions;
- Provides state recommendations for contributing NARFE-PAC funds to candidates in their respective state and help organize local events; and
- Shares contribution and disbursement information with chapter members.

NARFE’s NARFE-PAC Toolkit provides guidance and can be obtained from the Legislative Department or the NARFE website.

**AREA/DISTRICT OFFICER/DIRECTOR**
Is familiar with the operation of each chapter within its respective area/district;
Encourages activities to promote NARFE’s mission and chapter successes, and assists in resolv-
ing issues/problems;
❖ Consults with other federation officers and the respective regional vice president when necessary;
❖ Assists inactive chapters in becoming active. Organizes new chapters, and recruits new members. National Headquarters will provide appropriate guidance when necessary;
❖ Periodically visits each chapter in the area/district to assess the current status; and
❖ Organizes and chairs periodic meetings of chapter officers for training and discussing successes, issues and problems.

Note: The federation executive board should define the boundaries of each area/district, based on population, and legislative and geographic areas.

NARFE Alzheimer’s Federation Coordinator
❖ Act as a resource person and offer assistance to the new chapter coordinators as they begin their new terms. Ensure they are in possession of a Chapter Coordinator’s Manual.
❖ Work with federation executive board and chapter coordinators to set annual goals for fund-raising.
❖ Receive contributions from chapters.
❖ Once a month, send total contributions to the Alzheimer’s Association in the salmon-colored, pre-addressed envelopes provided by the Association.
❖ Reconcile with Monthly PGA Report from the Alzheimer’s Association.
❖ Set up Alzheimer’s display table at federation convention with brochures ordered through NARFE Headquarters and the Alzheimer’s Association.
❖ Request materials from the Alzheimer’s Association (Contact: Joseph Dominguez at 312-335-5828 or email jdominguez@alz.org. Order your supplies at least four weeks prior to your federation convention.)
❖ At federation convention, report on research and money contributed during the past year.
❖ Conduct workshop for chapter coordinators at federation convention.
❖ Make suggestions to chapter coordinators for raising money.
❖ Support the Alzheimer’s fundraiser at the National Convention.
❖ Present “Certificates of Appreciation,” signed by the NARFE-Alzheimer’s National Committee Chair and the NARFE National President, during federation convention. National certificates are obtained from your regional member of the National Committee.
❖ Handle Memorial Contributions: The Federation Coordinator has the responsibility to 1) advise a family when a memorial donation has been made to NARFE-Alzheimer’s Research and 2) send a NARFE thank-you card to the donor of a memorial contribution.
Section IV: Other Information

NATIONAL CONVENTIONS

Time and Place
NARFE’s National Conventions are held biennially in even-numbered years. They are primarily for conducting the business of NARFE, offering workshops, electing NEB officers and establishing NARFE’s legislative and policy agendas. The NEB selects the sites for National Conventions.

Representation
Each chapter is entitled to one delegate for every 50 voting members or fraction thereof. A chapter with 50 or fewer members is entitled to one vote; a chapter with 51-99 members is entitled to two votes, etc. The chapter delegation may cast as many votes as the number of delegates to which the chapter is entitled.

Each National Officer, RVP and federation president is a delegate-at-large and has one vote. If a federation president cannot serve, any federation officer, in order of succession, shall serve as the delegate-at-large and cast the federation vote.

In January of the convention year, National Headquarters (HQ) will provide convention information to each chapter president. This material verifies the number of chapter members and the authorized voting strength. It also includes forms to identify how the chapter will be represented. A chapter may choose (1) to send delegates, of whom one will be designated as the voting representative, or (2) to ask another chapter to represent it through proxy. Other chapter members may attend as alternate delegates and be asked to fill any delegate vacancies that occur.

National Officers are elected and money issues are voted on through the ballot process. RVPs are elected at the regional caucuses through ballot or acclamation.

Proxy forms are issued by the National Secretary/Treasurer. A delegate or delegate-at-large from the same federation may serve as a proxy, and may not serve as a proxy for more than three chapters.

Chapter presidents and secretaries will coordinate efforts to identify delegates and alternates, and submit names to Headquarters. (Note: All persons attending the convention are encouraged to register early and submit banquet reservations as a group so chapter members may be seated at the same table.)

Delegate Roles and Expenses
Before the convention, it is important that delegates read the convention resolutions and review parliamentary procedures. Delegates should be aware of action taken by their respective federation on a particular resolution. If none is shown, it indicates the resolution was submitted directly to Headquarters. At the appropriate time during a National Convention, the committee(s) having jurisdiction for ruling on resolutions will present a report of recommendations. Delegates will then vote in agreement or disagreement with the committee’s recommendations.
At the convention site, all delegates and guests must obtain their registration package and credentials. This is particularly important for delegates who are designated to cast their chapter or proxy votes.

A delegate acting as the voting representative for their chapter and/or if carrying other chapters’ proxies, will cast the ballot votes for these chapters. All delegates participate in the voice or floor votes on the resolutions considered and brought forth by the convention committees.

If at all possible, delegate expenses should be paid by the federation or the chapter. If a federation or chapter does not budget for all or part of such expenses, it could authorize some form of fundraising for this purpose. (Note: It is important that efforts be made to subsidize the expenses of delegates who are attending the National Conventions or reimburse them for their business-related, out-of-pocket expenses afterward.)

A delegate selected for a committee that meets before the convention convenes will receive a per diem from Headquarters to assist with additional costs.

**Sessions, Rooms, Banquets**

National Convention business meetings are held in the morning and afternoon sessions, Monday through Thursday. Workshops are held at breakfast, lunch and other specified times. The convention formally closes with a banquet on Thursday evening. Convention details and banquet reservation forms are made available at the appropriate time.

**Convention Resolutions**

Chapters may propose bylaw amendments or convention resolutions that address how NARFE operates, either through a federation convention or directly to the National Secretary/Treasurer’s office at Headquarters. All proposed bylaw amendments or convention resolutions must either be on form F-3A or F-3C.

Headquarters will set the deadline for submission, allowing time for review, printing and mailing the booklet to chapter secretaries and delegates. Deadlines will appear in *narfe* magazine and in the *NARFE Insider* quarterly e-newsletter for the Association’s leaders.

**AWARDS**

Awards are presented in recognition of significant or outstanding performance by members. It is very important to recognize the outstanding contributions of our members and to reward them accordingly. Award standards are established by individual chapters and federations. Recognizing members for top performance can be done in a number of ways, from a heartfelt “thank you” to a plaque. To assist chapters and federations in their awards programs, NARFE has two kinds of certificates – one for a member and another for an organization, as indicated below. An official desiring to use the “Citation for Distinguished Service” should ensure that the criteria prescribed have been met. NARFE does not provide certificates for certain types of recognition such as wedding anniversaries or birthdays.
Citations for Distinguished Service

Distinguished service certificates, bearing an embossed NARFE seal and red accent ribbon, may be requested from Federation & Chapter Services, at no cost, in five signature types: 1) Chapter President, 2) Federation President, 3) Regional Vice President, 4) National President or 5) Regional Vice President and National President.

Blank certificates for 1), 2) and 3) are available upon request. Simple certificates are on the NARFE website.

Specific language requested for Certificates for 1), 2) and 3) should have an appropriate region wide, federation wide or chapter wide significance.

Certificates requested for 4) and 5) must be accompanied by written justification of the service to be recognized and must be of significant value to a national program.

Chapter Anniversary Certificates

Chapter anniversary certificates, signed by the National President and the appropriate regional vice president, may be ordered through Federation & Chapter Services, which will research and verify anniversary dates and total years of continuous, active operation.

OBTAINING A NARFE BANNER

The standard NARFE banner measures 36-inches wide by 50-inches high. The banner is white with the logo and lettering in red and blue.

The chapter name and number appear across the top of the banner and National Active and Retired Federal Employees Association is printed in four lines across the bottom of the banner.

For a price quote, call the National Capital Flag Co., Inc. at 800-368-3524 (Washington, DC, area, 703-751-2411).

Make the check payable to National Capital Flag Co., Inc., and send the order to:
   National Capital Flag Co., Inc.
   100 South Quaker Lane
   Alexandria, VA 22314
Banners are shipped directly to the chapter from the manufacturer. If you have any questions or complaints, you can write to the address on the previous page, call 800-368-3524 (Washington, DC, area, 703-751-2411), or send an email message to flags@nationalcapitalflag.com. You can visit the manufacturer’s website at www.nationalcapitalflag.com.

CHARITABLE CONTRIBUTIONS

The use of membership dues to make donations to charitable organizations is **NOT ALLOWED**.

NARFE has always encouraged chapters to become involved in local community activities. One way to accomplish this is through making donations to charitable organizations. Also, a significant number of chapter members make donations to the NARFE-Alzheimer’s Research Fund and the NARFE-FEEA Scholarship and Disaster Funds. Contributing to these funds, whether they are associated with NARFE directly or not, is strictly voluntary. Moreover, these activities are not directly related to NARFE’s mission.

All monies collected – other than for NARFE PAC – whether through the national dues-collection system, fundraising activities or other methods, must go through the chapter treasury. When collected, these monies become dedicated funds and must be used for the purpose intended or collected. Monies collected for different reasons **MUST NOT BE COMMINGLED**. The chapter treasurer must maintain a separate account in the financial records for each of these types of funds. The chapter treasurer should use a chapter check to disburse funds from these accounts. Any questions regarding the disbursement of funds should be addressed to the National Secretary/Treasurer (natsectreas@narfe.org).
Appendices

APPENDIX A - CHECKLIST OF CHAPTER OPERATIONS

1. Organization

Committees (General)
☐ Encourage members to join a committee in which they may have an interest.
☐ Ensure that each chair has the necessary records and publications he/she needs.
☐ Offer assistance when necessary.

Legislative
☐ Develop plan to address “hot” issues at each meeting.
☐ Keep members informed and up to date on NARFE’s legislative agenda.
☐ Initiate periodic letter-writing sessions at chapter meetings.
☐ Communicate regularly with legislators by visiting offices, issuing invitations to attend meet-
ings, and attending town hall and other public meetings.
☐ Acknowledge legislators’ positive efforts, support NARFE friends and NARFE-PAC, and vote.

Membership Marketing Plan
☐ Develop a membership recruitment, prospecting and retention strategy plan at least annually. This strategy should guide all membership growth activities.
☐ Recruit and prospect actively within communities by participating in health fairs, pre-retire-
ment seminars, conventions, etc.
☐ Actively work to retain and reinstate members dropped for nonpayment of dues.
☐ Advertise Dues Withholding and Life Membership programs.

Reports
☐ Submit F-7(Chapter Officer Roster) annually or when there is a change in officers, meeting time and place or dues. May be submitted online.
☐ Use the Online Activities Module (OAM) to review and take action to manage membership.
☐ Audit annually and when a change of treasurer. Use form F-131.
☐ Treasurer should review monthly financial reports from NARFE (Dues Activity, Dues Advance, and Recruiting Fee Reports).

Service to members
☐ Assist survivors and provide information pertaining to complex issues concerning retirement, FEHBP, FEGLI, Social Security and Medicare.
☐ Alert members to retirement or health care benefit changes that affect the federal community.
☐ Alert members concerning new spouse’s survivor elections and FEHBP coverage.
☐ Work in conjunction with service officers, service centers and Federal Benefits Service Depart-
ment to assist members and nonmembers to resolve benefit problems/issues.
Newsletter Preparation, Printing and Distribution

- Produce a chapter publication taking into account the chapter's membership dynamics. (Suggestion: If producing a chapter newsletter is too time-consuming or costly, perhaps doing a joint newsletter with another chapter is possible.)
- Include committee reports and up-to-date information on critical issues such as legislation, membership status, meetings, programs, etc.

2. Use of resources

- Establish dues that are realistic and adequate for promoting NARFE’s mission and other chapter objectives.
- Monitor dues payments to ensure renewals and “reinstates” are timely.
- Conduct fundraising activities for charitable purposes. Member dues shall not be used for charitable contributions (NARFE Bylaws, Article I, Section 4. G.).

3. Chapter meetings

- Plan meetings based on member needs and interests.
- Select speakers based on expressed interests and NARFE’s mission.
- Meet and greet newcomers, and include them in chapter activities.

4. Outreach to community

- Encourage members to search within their respective communities for potential NARFE members.
- Participate on behalf of NARFE in local civic events.
- Establish a relationship with local Chambers of Commerce and visitor centers.
- Select a local charity for sponsorship by your chapter.

5. Establishing relationship with federal agencies

- Contact human resources or personnel officer (contact person and access permission will vary from agency to agency) for access to retirement planning events or for permission to leave materials in a designated area. (See sample letter of introduction – Appendix H – which might be helpful, and use, if necessary, to gain entrance into federal facilities.)
- Contact Federal Executive Board within local jurisdictions, and ask to make a presentation to the board or for assistance to gain entrance to federal facilities.

6. Convention participation

- Discuss issues at chapter meetings that pertain to NARFE’s mission and, if considered appropriate, draft resolutions for consideration at federation and national conventions.
- Encourage members to become delegates, to participate as committee members, and to speak on resolutions of interest at both federation and national conventions.
- Provide funding, if available, for delegates to attend federation and national conventions.
KEEPING A CHAPTER ACTIVE

The following are excerpts from a document prepared by former Region VII Vice President Betty Lucero-Turner, with added comments by former National Secretary Elaine Hughes:

Chapter Leadership:
- Inspire trust, respect and approachability.
- Stay connected to other chapter leaders and be accessible.
- Express responsiveness to the interests of the members.
- Recognize when assistance is needed, and ask for help.

Chapter Culture (dynamics):
- Recognize the dynamics of the chapter members (the makeup of the membership).
- Turn resistance to change into a welcome challenge when warranted.

Identifying Volunteers:
- Approach potential volunteers to come forward to take on tasks.
- Provide guidance when necessary.
- Capitalize on a member’s expertise, experience and knowledge. Remember, members have varied backgrounds and can offer assistance in many areas of NARFE management.

Communication:
- Communication is a top priority in keeping chapters active.
- Always communicate with leadership and members and to share information.
- Take advantage of the latest technology in choosing your methods of communication.

Empowering Members:
- Encourage members to become involved in advancing NARFE’s mission.
- Remind members to stay informed and up-to-date on critical issues facing the federal community.
- Spend time discussing the issues at meetings and make sure members understand the importance of their involvement in grass-roots advocacy.

Importance of Mentoring:
- Leadership succession is an important link in keeping chapters active.
- Invest the time and energy in educating and teaching potential leaders.

Leadership Teamwork:
- Teamwork is critical to a successful chapter.
- Teamwork inspires and is key to achieving the goals of a successful and active chapter.
Where do you want the chapter to go?

- Evaluate the needs of the chapter.
- Keep in mind the importance of membership prospecting, recruitment and retention.
- Create a strategic plan. Such a document need not be complicated, so keep it simple!
- Set attainable goals that are specific, measurable, realistic and timely.
- Obtain agreement and/or buy-in from chapter members.

Legislative Responsibilities:

- Take an active role in promoting NARFE’s legislative agenda.
- Stay informed about critical legislative issues.
- Contact your respective members of Congress, and develop relationships with the representative and/or senator and their staffs.
- Remember to thank our congressional allies.
- Keep in contact with those members who are not necessarily supportive. NARFE voices must be heard.

Other Suggestions:

- “Coffee clusters” – Members meet informally to discuss NARFE issues and to stay informed in lieu of monthly meetings.
- “Shared responsibility” – Having two members share a position lessens the burden of responsibility.
- Joint chapter meetings – Periodically join with another chapter that shares the same congressional district or to undertake a joint project.
- Chapter mentoring – Those chapters that remain active may be able to assist chapters that are inactive or on the verge of closing.
- Chapter meeting schedules – If monthly meetings no longer seem to be feasible, assess your chapter’s attendance and gauge your members’ preferences to determine if an alternative meeting schedule better meets their needs.
**APPENDIX B - RECORDS MANAGEMENT**

**Quick Reference Chart**

Record keeping is important to the overall management of chapters and federations. Good management decisions depend on well-organized and complete record keeping. As leadership changes, providing sufficient records is critical for a smooth transition. Records should be kept for a specified time period, and periodic purging is recommended. Having in place a procedure for the proper storage of records is recommended.

This chart is a guide for current practices and includes standards that are accepted by NARFE. Records can be divided into three categories – One-Year Files, Three-Year Files and Permanent Records.

### Records Management Schedule, Quick Reference Chart

<table>
<thead>
<tr>
<th>File Type</th>
<th>Maintenance Period</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent Records</td>
<td>Permanent</td>
<td><em>(Until superseded)</em></td>
</tr>
<tr>
<td></td>
<td><em>As long as equipment is retained</em></td>
<td></td>
</tr>
<tr>
<td>Financial Records:</td>
<td>Three years preceding the current fiscal/calendar year</td>
<td>IRS form 990. Organization Exempt from Income Tax. *Usually records that support an item of income, deduction or credit must be kept for three (3) years from the date the return is due or filed, whichever is later. Keep records that verify the organization’s basis in property for as long as they are needed to determine the basis of the original or replacement property. The organization should also keep copies of any returns it has filed. They help in preparing future returns and in filing amended returns.</td>
</tr>
<tr>
<td>Three-Year Files</td>
<td>Previous year and current fiscal/calendar year</td>
<td>Correspondence should be destroyed unless it contains historical information.</td>
</tr>
<tr>
<td>General correspondence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-Year Files</td>
<td>Two years, then screened for disposal or nonessential material prior to turning over to the incoming chairman</td>
<td>File folder labels should indicate: <em>Subject</em> <em>Calendar/fiscal year</em> <em>Disposition instructions (one year, three years or permanent)</em> Normally, the contents of a file folder should not exceed 1 1/2 inches.</td>
</tr>
<tr>
<td>Committee Records</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX C – MEMBERSHIP PROSPECTING, RECRUITING AND RETENTION

This section gives an overview of the three most important membership initiatives. It is important that National Headquarters, federations and chapters work together to enhance membership efforts.

NARFE members have always been key in recruitment and retention.

NARFE members are also key in dramatically expanding prospecting efforts.

Prospecting: The effort to find and acquire contact information for prospective – or likely – NARFE members. Synonym: Lead Generation

Why Prospect?
To build our in-house list of targeted prospects for recruitment. A large NARFE prospect list is key to high-volume recruitment.

What does Headquarters do with the prospect list?
New Prospect Letter: A letter acknowledging the prospect’s recent interest, and inviting them to join, is sent within a week of data entry.

Email Cultivation Series: All prospects, upon data entry, are entered into an email-based membership cultivation program. Prospects are offered white papers, take a survey and are invited to join. Relevant engagement is a key factor in converting prospects to members.

Direct Response Mailings: Prospects are selected for acquisition mailings. Multiple exposure is a key factor in converting prospects to members.

Recruiting and Prospecting: How do they work together?
NARFE members are our best recruiters – and prospectors. All encounters with potential members should be viewed not only as a recruiting opportunity, but also as a prospecting opportunity.

Here is a sample of the NARFE Recruiting/Prospecting materials, which includes a copy of narfe magazine, the NARFE membership brochure (F-135), prospect information

Figure 5: Recruiting Materials – NARFE Elevator Speech, F-135, narfe magazine and M-2
cards (M-2) and a sample elevator speech (form F-20). The materials are designed to simplify and streamline field efforts to recruit and prospect at local events. These can be ordered from Headquarters, and assistance is available for determining quantities needed.

**Why the “Elevator Speech”?**
An elevator speech is simply a summary of NARFE’s mission and membership benefits – or the best possible way to present NARFE and the value of membership within a limited amount of time.

We seldom have the luxury of a relaxed, extended discussion with a potential NARFE member. Instead, it is the hurried pitch to busy attendees of a health fair or a brief, chance encounter with a newly discovered fellow federal employee.

Having a clear, highly focused elevator speech memorized makes certain that the limited time you have with prospective members is used wisely.

*The best speech will be based on answering four key questions:*

1. What is NARFE?
2. What does NARFE do?
3. What are the benefits of NARFE membership?
4. Why should I join?

*See the sample NARFE elevator speech on p. 36.*

**Retention**
Retention includes both renewals and reinstates.

Retention efforts begin on the first day of NARFE membership. Effective retention strategies include extending a warm welcome to new members, engaging them in NARFE business and inviting them to participate in local NARFE chapter activities and meetings.

Using the Online Activities Module (OAM) or the M-112 (Monthly Chapter Activity Report) will allow tracking those members who have received second renewal notices and those who are in danger of being dropped. Phone calls, emails or mailings to these members, along with a gentle reminder to renew, will increase retention.

**Resources for Recruiting and Retention**

*Recruiting and Retention Journal*
The Recruiting and Retention Journal is published quarterly and mailed to chapter and federation presidents, membership chairs, editors, pre-retirement seminar speakers, federation public relations chairs, federation area officers, regional vice presidents and national officers.

Each issue provides best practices for recruiting and retaining members at the chapter level. Submissions from the field are encouraged.

The most recent issue and archived issues going back to 2012 are available online in the “Officer Resources” section under “Newsletters.” An index also is available.
NARFE Elevator Speech

An elevator speech is simply a summary – or the best possible way to present NARFE and the value of membership within a limited amount of time. We seldom have the luxury of a relaxed, extended discussion with a potential NARFE member. Instead, it is the hurried pitch to busy attendees of a health fair or a brief, chance encounter with a newly discovered co-fed. A clear, highly focused elevator speech makes certain that the limited time is used most wisely.

The best speech will be based on answering four key questions:

- What is NARFE?
- What does NARFE do?
- What are the benefits of NARFE membership?
- Why should I join?

The following benefits can be used to demonstrate the value of NARFE as you tailor your speech to your audience.

NARFE is the National Active and Retired Federal Employees Association. It is the only organization solely dedicated to protecting and preserving the pay and benefits of all federal workers and retirees.

NARFE has two primary roles:

- Your legislative voice. In-house, influential lobbyists advocate on Capitol Hill on behalf of the federal community.
- Your information resource. NARFE provides clear information and trusted guidance on complex federal benefits issues.

As a member of NARFE, you receive:

- narfe magazine — the primary source of information and guidance on critical legislation and benefit issues.
- Access to a team of federal benefits specialists for answers to complex benefits questions.
- FREE access to webinars and online resources to help you make the most of your federal benefits.
- Legislative alerts on issues that impact the federal community. NARFE’s online Legislative Action Center gives you easy access to your member of Congress.
- Member-only discounts on many products and services that you use regularly. NARFE members also are eligible for disaster relief grants, and family members may qualify to compete for college scholarships.

When you join NARFE, you will help protect your earned pay and benefits, get trusted answers to complex pay and benefit questions, and support the federal community.
**Tips, Tools and Templates**
In “Officer Resources” under “Tips Tools & Templates,” leadership will find documents to help develop strategic plans, recruiting tools such as posters, print ads, sample letters/emails and more.

*The goal for both federations and chapters should be the strategic development of NARFE membership to ensure the long-term strength of the Association and the ability to fulfill our mission. Recruiting, Prospecting and Retention should be ongoing activities of NARFE federations and chapters.*
NARFE Chapter
Charter Application

The federal employees or civil annuitants and/or spouses listed below agree to form a NARFE Chapter and hereby apply for a charter. The chapter’s principal location is ____________________________________________________________________

The chapter’s logistic support area (LSA), in which the chapter may recruit, consists of these ZIP codes, as approved by the federation president or authorized representative: ____________________________________________________________

_______________________________ ______________
Secretary Date

NOTE: All applicants must be NARFE members or, for nonmembers, their membership applications and dues payments must be attached.

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>City</th>
<th>State</th>
<th>ZIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**APPENDIX E – F-131, AUDIT CHECKLIST**

Checklist for the Audit of NARFE Chapter Funds

**General Information**
1. Name and number of Chapter: 
2. Name of bank or credit union where account is kept: 
   - Is this institution federally insured? Yes □ No □ If not, account should be moved to a federally insured institution, preferably one with an interest-bearing account.
3. Name of account: 
4. Account number: 
5. Names of individuals authorized to sign checks on the account: (A minimum of two individuals should be authorized.)
   1. ________________________________________________________________
   2. ________________________________________________________________
   3. ________________________________________________________________
   4. ________________________________________________________________
6. Do checks need to be countersigned? Yes □ No □
   - If yes, names of the individuals authorized to countersign checks:
     1. ________________________________________________________________
     2. ________________________________________________________________

*Note: Questions 4, 5, and 6 above should be obtained from the bank or credit union where funds are kept.*

**Income**
1. Are all chapter funds received, promptly deposited in bank or credit union accounts? Yes □ No □
2. Are chapter dues received from National Headquarters with a listing of the dues? Yes □ No □
3. Are other funds, such as kitty collections and other donations promptly recorded and deposited in the account? Yes □ No □

**Disbursements**
1. Are funds disbursed as authorized by the chapter president or other officers who are specified in the chapter's bylaws and policies? Yes □ No □
   - If not, what action was taken to obtain authorization for the disbursement? Please annotate on the reverse side.
2. Do dispersed checks match receipts/vouchers? Yes □ No □
3. Has per-capita dues been remitted promptly to the Federation Treasurer? Yes □ No □
   - If not, what action should be taken by the chapter to ensure this is done? Please annotate on reverse side.

**Other Items**
1. Are accurate records kept of all chapter income and expenses? Yes □ No □
2. Is a financial report prepared and presented to the chapter each month? Yes □ No □
3. Are the financial records and bank statements reconciled each month? Yes □ No □
4. Are the NARFE PAC funds kept separate from chapter funds? Yes □ No □

This review of chapter records was performed by:

- Member: ___________________________ Date: ___________________________
- Member: ___________________________ Date: ___________________________

*Note: Auditors can be any two members of the chapter with the exception of the officers (President, Vice President, Treasurer or Secretary/Treasurer), who should provide all necessary records and any assistance that is required to conduct the audit.*
# Chapter Treasurer’s Monthly Report

<table>
<thead>
<tr>
<th>CHAP TE R N U M B E R</th>
<th>L O C A TI O N</th>
<th>P E R I O D E N D I N G</th>
</tr>
</thead>
</table>

## Receipts*

- Savings (Long term) $__________
- Total dues collected $__________
- Monies received from Ways and Means committee activities $__________
- For special projects such as programs ads, etc. (itemize) $__________
- Birthday and anniversary fund $__________
- Miscellaneous (itemize) $__________

**Total Receipts** $__________

**Total to be accounted for** $__________

## Disbursements*

- To National Office for dues collected $__________
- To Federation Treasurer for dues $__________
- Office/Officer expenses (itemize) $__________
- Other office expenses $__________
- Disbursements of special collections $__________
- Chapter newsletter/bulletin printing and copying expenses $__________
- Miscellaneous (itemize) $__________

**Total Disbursements** $__________

**Total to be accounted for** $__________

## Obligations*

- Dues to be remitted to National $__________
- Federation dues to be remitted $__________
- Second year members $__________
- Third year members $__________
- Other obligations (itemize) $__________
- Estimated routine expenses next month $__________

**Total Obligations** $__________

**Balance on hand for use** $__________

---

**Signed**

Treasurer

**Date**

---

F-38 (02/14) *May not have entries under combined dues collection. Use reverse side for itemizing entries above.*
Presiding Officer: Please raise your right hand.

I hereby pledge to effectively perform the duties of my office; carry out the programs, policies and bylaws of the Association; promote its goals and objectives; and work as a team in harmony with the Association’s leadership.

I will safeguard all of the Association’s property under my care; have such property available for official inspection, if required; and pass on said property intact to my successor.

Please say “I do.”

I hereby declare you duly installed officers of the ______________ _________ Chapter/Federation. You will now assume the duties of your office as prescribed by the bylaws.

If available, the newly elected officers should be presented with the appropriate pin, and the outgoing president should be presented with a past president’s pin.
APPENDIX H – LETTER OF INTRODUCTION FOR ACCESSING FEDERAL FACILITIES AND ATTACHMENT

Dear Federal Colleague:

As you may know, the National Active and Retired Federal Employees Association - familiar to many federal employees as NARFE – is leading the fight to protect and preserve earned financial and health benefits for both active and retired federal employees. NARFE is not a labor union, and is classified by the IRS as a 501(c)(5), a not for profit organization. NARFE, headquartered in Alexandria, VA, was created in 1921 and has a current membership of 260,000 nationwide, including all 50 states, Puerto Rico, Virgin Islands, Panama, Philippines and Guam.

Since GSA regulation 102-71.20 (please see attached section from GSA 102-71.20) allows organizations such as NARFE into federal buildings and because of the highly focused and critical nature of NARFE’s mission, please grant permission for local NARFE representatives to enter your facility. The primary purpose would be to share valuable benefit-saving information important to all federal employees. Please read on for additional information on how NARFE can offer this one-of-a-kind service to federal employees.

By way of background, NARFE is a membership organization solely dedicated to protecting and preserving the benefits of All federal workers and retirees by implementing an aggressive legislative agenda, which has produced winning results, including:

- Making a Roth option available in the Thrift Savings Plan (TSP);
- Federal employees are able to transition to a part-time work schedule while also collecting a partial annuity;
- FERS workers may now credit half, and, in 2014, all, of their unused sick leave toward retirement.

Beyond NARFE’s critically important and successful lobbying weight, NARFE members receive additional benefits that keep them informed and up-to-date on everything that affects their status as a federal employee or retiree. Its publications, website and Federal Benefits Services Department provide clear information and trusted guidance on complex benefit issues.

Thank you for considering my request to allow NARFE access to your facility. If you need further information regarding NARFE’s mission, please contact David Snell, Director, Federal Benefit Services Department, NARFE Headquarters, by phone, 703-838-7760, ext. 269 or email, DSnell@narfe.org or the local NARFE representative whose contact information is provided separately.

Sincerely,

Richard G. Thissen
National President

Enclosures: NARFE Brochure
GSA Regulation Section 102-71.20

Richard G. Thissen
National President

Enclosures: NARFE Brochure
GSA Regulation Section 102-71.20
The General Services Administration (GSA) allows distribution of flyers, pamphlets, or hand
bills under the following conditions:*

- The materials are distributed in "public areas" of the building (see definition below).
- A permit is obtained from the building manager.
- The organization distributing the materials is classified as a not-for-profit [501(c)].

NARFE is classified by the IRS as a 501(c)(5), a not-for-profit but not a labor union.
"Public area" means any area of a building under the control and custody of GSA that is
ordinarily open to members of the public, including lobbies, courtyards, auditoriums, meeting
rooms, and other such areas not assigned to a lessee or occupant agency.

*GSA 102-71.20
APPENDIX I – CHART OF NARFE POSITION CODES AND OAM ACCESS

This section documents NARFE Position Codes and access in the Online Activities Module (OAM). For information on the OAM, see Appendix J.

To access the OAM, officers must have a valid email address in their NARFE membership record. If a chapter or federation does not have any officers in these positions who have access to a computer, they can simply assign an officer who has access to a computer to one of these positions in order to create an account for the chapter or federation.

Officers from chapters and federations can access this module to perform tasks as follows:

- Maintain an up-to-date chapter and federation officer roster (F-7, F-7A)
- Retrieve membership data with specific membership criteria
- Save data to better manage chapter and federation membership
- Communicate through direct email with individual members and prospects.

❖ **CHAPTER LEVEL** includes: “F-7 Update,” “Officer Roster,” “Activity Reports,” “Member Roster,” “NARFE Email System (NES),” and optional “NARFE Web Hosting” for that person’s chapter only.

❖ **FEDERATION LEVEL** includes: “F-7A Update,” “Officer Roster,” “Activity Reports,” “Member Roster,” “NARFE Email System (NES),” and optional “NARFE Web Hosting” for all chapters in the federation, and chapter-level access to officer roster, member roster and activity reports.

**Currently there are three MODES OF ACCESS:**

Full mode allows changing any F-7 (chapter) or F-7A (federation) position assignments, dues, etc. Only a very limited number of people in each organization have the need to change the F-7 or F-7A assignments.

**ONLY FULL** mode allows access to the corresponding Officer Roster, Activity Reports and Member Roster, including easy downloading of data into Microsoft Excel, text, or printing. Member data downloaded to Excel has the expiration date as a true date.

**DOWNLOAD** mode allows access to and ability to save the corresponding Officer Roster, Activity Reports and Member Roster, including easy downloading of data into Microsoft Excel, text, or printing.

**READ ONLY** mode allows the Activity Reports, Officer Roster and Member Roster to be viewed or printed, but there is no easy way to download the data into Excel or as text, and the expiration date field includes letters such as “AN” or “*LIFE,” which interfere with Excel features such as filtering on date.

The NARFE Information Services Department is working with the NARFE Configuration Advisory Board (CAB) to further advance NARFE in technology, as more and more members and officers use technology in their daily routine. CAB is made up of 10 members, one from each region, who
represent chapters and federations. NARFE members and officers are urged to contact their regional CAB representative to voice their opinions or offer suggestions for improving online data services. Go to http://www.narfe.org/cab/member/index.cfm to contact a CAB member.

**Chart of NARFE Position Codes and OAM Access**

<table>
<thead>
<tr>
<th>Position Code</th>
<th>Description</th>
<th>OAM F-7/F-7A Access</th>
<th>OAM Officer Roster Access</th>
<th>OAM Activity Reports &amp; Member Roster Access</th>
<th>NES Access</th>
<th>Web Hosting Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chapter President</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>2</td>
<td>Chapter First Vice President</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>2A-2C</td>
<td>Chapter Additional Vice Presidents</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Chapter Secretary</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>4</td>
<td>Chapter Treasurer</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Chapter Secretary/Treasurer</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>6</td>
<td>Chapter Legislative Chair (National)</td>
<td>Read Only</td>
<td>Read Only</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Chapter Membership Chair</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>7A</td>
<td>Chapter Membership Retention Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Chapter Public Relations Officer/Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Chapter Service Officer</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Chapter Service Communication</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Chapter Editor</td>
<td>Download</td>
<td>Download</td>
<td>Full</td>
<td></td>
<td>Full</td>
</tr>
<tr>
<td>12</td>
<td>Chapter Alzheimer Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Chapter NARFE-PAC Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Chapter Financial Secretary</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Chapter Other</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Chapter Network Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td>Full</td>
</tr>
<tr>
<td>16A</td>
<td>Chapter Network Coordinator/Social Media Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Chapter Legislative Chair (State)</td>
<td>Read Only</td>
<td>Read Only</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Chart of NARFE Position Codes and OAM Access

<table>
<thead>
<tr>
<th>Position Code</th>
<th>Description</th>
<th>OAM F-7/F-7A Access</th>
<th>OAM Officer Roster Access</th>
<th>OAM Activity Reports &amp; Member Roster Access</th>
<th>NES Access</th>
<th>Web Hosting Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>*20</td>
<td>Federation President</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>21</td>
<td>Federation Executive Vice President</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>22A-D</td>
<td>Federation Additional Vice President</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Federation Secretary</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>24</td>
<td>Federation Treasurer</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Federation Secretary/Treasurer</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>26</td>
<td>Federation Legislative Chair (National)</td>
<td>Read Only</td>
<td>Read Only</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*27</td>
<td>Federation eDivision Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Federation Legislative Chair (State)</td>
<td>Read Only</td>
<td>Read Only</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Federation Public Relations Officer/Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Federation Service Officer</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Federation Membership Chair</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>33A</td>
<td>Federation Membership Retention Chair</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Federation Editor</td>
<td>Download</td>
<td>Download</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Federation Alzheimer’s Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Federation NARFE-PAC Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Federation Immediate Past President</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Federation Other</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Federation Network Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td>Full</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41A</td>
<td>Federation Network Coordinator 2</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>41B</td>
<td>Federation Social Media Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Federation FEEA Coordinator</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Federation Area/District Officer</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>43A-S</td>
<td>Federation Area/District Officer 1-19</td>
<td>Read Only</td>
<td>Read Only</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Full access to eDivision member roster, eDivision email system and eDivision website management*
APPENDIX J – OFFICER RESOURCES ON THE NARFE WEBSITE

The NARFE website offers many resources to officers that can save time, expense and reduce errors. Log in to www.narfe.org (“Secure Login” is preferred), then click the “Officer Resources” button. The “OAM Home Page” offers data services and reports for your chapter or federation, and resources such as forms and guides on demand, newsletters, and access to helpful tools, tips and templates.

Data Services and Reports
Access is determined by your assigned position on your chapter or federation’s officer roster (Appendix I).

Data Services use your organization data to communicate with your members. These include:

- Web hosting, an easy-to-use, professional-looking, NARFE-branded and supported website service that includes support for pictures and files such as newsletters.
- NARFE E-mail System (NES), which uses your organization roster email addresses to communicate with your members. This easy-to-use system lets you create message templates and mailing lists to personalize each message with just a few clicks.
- Other services as needed, such as convention delegate authorization and designation.

Data Reports include the officer roster, member roster, plus activity reports (new members, re-instated, dropped, transfers, deceased, cancellations, prospects, payment status changes, second notices and other information). Two modules are available. If the same report exists in both, choose the OAM version.

- **Online Activities Module (OAM)** provides up-to-the minute officer and member rosters, and activity reports. You may choose what information is included and the timeframe for activity reports. Special features for key officers include online updating of member contact information, access to member history, death reporting (F-9), and ease-of-use features such as mailing labels with a single click.
- **Online Reports Module (ORM)** The reports include monthly chapter and federation financial reports, and statistical details for federations are created at a specific point in time and stored for each organization to access. Rosters such as the member roster are run quarterly, and are usually out of date.

Entry into the OAM provides OAM data reports and data services. The ORM is accessed separately. NARFE Information Technology (IT) is in the process of consolidating all reports and services into the OAM.

The OAM Home Page has a link to documentation modules to learn how to use the OAM.

Resources
Most NARFE forms are available to download or print on demand from the “Forms by Form Number” page. “Requisition for Printed Supplies,” Form F-18, is a directory of the most frequently used forms. If you need paper copies, use the online order form under “Order Forms Supplies.” Electronic versions are easier to search, take less space to store, and waste fewer resources. Fillable
forms let you type the information on your computer, save and then email as needed. Typed information helps reduce errors.

Headquarters Directory, Form H-134, has contact information for NARFE department email addresses and phone numbers.

Newsletters include the *NARFE Insider* and *Recruiting & Retention Journal*.

“Tools, Tips and Templates” includes sample letters, newsletter templates, logos and more.

**Configuration Advisory Board (CAB)** activity and contact. The CAB is the liaison between field organizations and NARFE IT for future information reports and functions.