

NARFE Texas Federation Matching Funds Final Status Report

Matching funds requests require advance approval using form TF-4A. Final Report must be sent to your TF District Representative so that it is received by Federation President within 30 days after the event/project. Include a Word document if more space is needed.

Submitted by (Name) _____

Contact Email: _____ Phone _____

Chapter #: _____ Chapter Name: _____

1.A. Event

Describe event (name, location, city, dates) or advertising campaign:

Attendees: _____ % NARFE Eligible: _____ # of visitors to booth: _____

Applications given out: _____ # new paid members: _____

M-2 cards completed: _____

**Forward M-2 cards to NARFE Recruiting Department (as soon as possible) **

1.B. Advertising

Leads Generated _____ Members gained _____

Audience Reached _____

2. Outcomes to Goals comparison

3. Lessons learned

4. Total Cost _____ / Members gained (not free) _____ = cost/member _____

5. Honest evaluation of the value in terms of outcomes to dollars and energy spent

6. Itemized costs such as booth fee, insurance, # miles & mileage, meals, lodging, drawings, etc. (include TF-2 Expense form). Include copies of all receipts including meals (indicate whether breakfast, lunch or dinner). Receipts need to show actual purchase, not just a dollar amount.

Chapter President Signed: _____ Date: _____

DR: _____ Approved: Yes No Date: _____

AVP: _____ Approved: Yes No Date: _____

President: _____ Approved: Yes No Date: _____

EB: _____ Approved: Yes No Date: _____

Please use a Word document if more space needed. Matching Funds Final TF-4F (revised 5/18)

NARFE Matching Funds Guidelines – Texas Federation

DESCRIPTION AND APPLICATION PROCEDURES

The Matching Funds Program is a 50-50 match incentive designed to encourage NARFE federations and chapters to implement projects that enhance membership prospecting and recruiting marketing strategies. The program assists the efforts of federations and chapters by offsetting the cost of developing prospects and recruiting NARFE members.

All federations and chapters are eligible to apply for matching funds. However, because of limited funding, applications are approved on a case-by-case basis. When budgeted funds have been depleted for the budget year no additional matching funds can be distributed.

Examples of projects that may qualify for matching funds are:

- Advertising in local newspapers or other relevant local publications (Multiple placements with input coordinated through the Federation);
- Booths or tables at local conferences, conventions, fairs, festivals or other relevant events in your area (insurance, booth fees);
- Recruiting/membership incentives (drawing prizes, door prizes)

Submitting a Request to the Federation – TF-4A Application

Matching funds require prior approval.

Federation guidelines must comply with NARFE Headquarters guidelines which may change. Activities and events which may have been approved in the past may not be approved in the future. In some cases, NARFE Headquarters and the Federation use different policies. Please **follow federation policies** when submitting an application and final report.

Only requests totaling \$100 or more will be considered. Please submit your application using Matching Funds Application TF-4A with the following details:

- Date of event or launch date of project
- Detailed description of the project/opportunity
- For booth and fair opportunities, provide exhibitor kits and/or links to exhibit information
- Anticipated impact on efforts to attract prospects and/or recruit members
- Goals for the project/event
- The estimated cost of the project (Use actual costs if available.)
- Marketing plan if you are creating your own event
- A matching funds request must total at least \$100 before it will be considered by the federation. It must total at least \$200 before the Federation will consider it for submission to NARFE Headquarters.
- Lodging for an event less than 100 miles away (200 mile round trip), requires advance approval.
- Proposal must be signed by the chapter president and forwarded to the District Representative. If approved, the DR forwards to the Area Vice President. If approved, the AVP forwards to the federation president for approval by the Federation Executive Board.
- The Federation President must receive the TF-4A Application at least one (1) month before the event date.

Email and contact information for your DR is published in each issue of the “Texas Federation Register.”

All proposals will be reviewed and the approval or denial will be sent in a timely manner to the chapter or federation representative who submitted the proposal.

IMPORTANT NOTE:

Funds will not be released until a final report for the event or project is completed, approved by the Federation, and optionally sent to NARFE Headquarters by the Federation for those activities which qualified.

Final Status Report – TF-4F Final Report and TF-2 Expense Report

The Final Status Report must be submitted as soon as possible after the event, and should follow the same flow as the application. Chapters must send a copy to their DR. If approved, the DR forwards to the AVP, and if approved, the AVP forwards to the Federation President **within 30 days after the event**. If appropriate, the federation must send a final report to NARFE Headquarters **within 30 days after the event**. Use Matching Funds Final Status Report TF-4F. The report will include:

- 1) Provide an “outcomes to goals” comparison. Were your expectations met?
 - a. For events:
 - i. Total attendees
 - ii. Count of contacts (visitors to booth)
 - iii. Number of applications provided/completed
 - iv. M-2 cards completed
 - b. For advertising
 - i. Leads generated
 - ii. Members gained
 - iii. Audience reached
- 2) Lessons learned
- 3) Honest evaluation of the value in terms of outcomes to dollars and energy spent
- 4) Form TF-2 Expense Report with copies of all receipts, **including receipts for any meals claimed**.
- 5) Completed M-2 cards. Make sure M-2 cards have at a minimum a usable, readable name and mailing address. Spell out abbreviations, e.g., change “SA” to San Antonio, etc. Send as soon as possible to the NARFE Recruiting Department at Headquarters. The faster NARFE gets them in the database the sooner they can contact them for membership!