

Texas Federation Officer Chapter Checklist

This checklist is intended to help chapters improve. It may be used as a guide to maximize the effectiveness of visits for both the visitor and the chapter.

This is a planning worksheet, it is not a required report. Please include noteworthy results, observations and recommendations in your monthly activity report (TF-1)

Chapter#: _____ Chapter name: _____

Report by: _____ Visit date: _____

Before Visit

- 1) Review chapter activity in the OAM to look back on chapter performance since your last visit, or 12/31. Last visit or 12/31 date: _____

a) New Members:	b) Reinstatements:
c) Dropped:	d) 2nd Notice:
e) Transfer out:	f) Transfer in:
g) Cancellation:	h) Prospects:
i) #voting members last time:	j) #members now:
k) Net gain/loss (i-j)	l) # members email at NARFE

- 2) Identify praiseworthy items for commending the chapter: dues withholding %, email at NARFE %, recruiting & retention, etc.

Dues withholding % = # on DWH (Dues Category=B) divided by [total membership less life members (DC=D) less honorary members (DC=F)].

For example, a chapter of 100 has 40 DWH members, 15 life, and 5 honorary.

$DWH \% = 40 / (100 - 15 - 5) = 40 / 80$ or 50%.

If you use Excel data filtering, Excel will show you the count for a selected dues category.

- 3) Identify items needing emphasis or improvement opportunities (agenda, greeter, hospitality, interesting programs, legislative initiatives, publicity, etc.)

- 4) Prepare for any special requests and/or questions from the chapter.

During Visit

- 1) Commend and encourage chapter for items they are doing well.

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- 2) Point out areas where the chapter could improve.
- 3) Provide update on NARFE current events.
- 4) Promote current NARFE campaigns and events (legislative action, dues withholding, conferences, PAC, etc.)
- 5) Ask if they need assistance with a NARFE issue or problem.
- 6) Inquire about succession planning (persons identified to assume chapter leadership roles)
- 7) Suggest goals to the chapter (prospects, recruitment, retention, dues withholding, email at NARFE).
- 8) Offer suggestions for future programs for chapter meetings.
- 9) Ask about recent legislative activities (letters, visits, calls, NARFE PAC).
- 10) Assess the overall "health" of the chapter (attendance, leadership, gain/loss, meeting room, and atmosphere – friendly/cliquish/fun/cold, etc.—do you feel welcomed?).

After Visit

- 1) Provide written feedback (via e-mail when possible) to Chapter President of your observations.
- 2) District Representatives should update their Area VP with outcomes on the next Monthly Activity Report (TF-1)
- 3) Fulfill any commitments made to chapter or answers to any unanswered questions.
- 4) Determine if a follow-up visit is needed, obtain approval and schedule accordingly