

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 NARFE AMS to look back on chapter performance since the last visit. Last visit date: _____

New Members: _____	Reinstatements: _____	Dropped: _____
2 nd Notice: _____	Transfer out: _____	Transfer in: _____
Cancellations: _____	Prospects: _____	#Members with emails: _____
Voting Members Last: _____	Voting Members Now: _____	Net Gain/Loss _____
Honorary Members: _____		

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

3) Identify items needing emphasis or improvement opportunities (agenda, greeter, hospitality, interesting programs, legislative initiatives, publicity, honorary members remaining on membership lists, etc.

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

During Visit

1) Are annual audits conducted?

2) Review the proper filing of reports (monthly chapter, annual 990-N, etc.).

3) Review the financial status of the chapter (Non-profits need proper use of funds – expenses for NARFE related mission activities. Does the chapter have excess cash on hand?

4) Ask if they need assistance with a NARFE issue or problem or if they need any training regarding a NARFE program. Is the chapter dashboard updated with current information? Are membership files properly maintained (should have no honorary members on list)?

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- 5) Inquire about succession planning (persons identified to assume chapter leadership roles).
- 6) Commend and encourage the chapter for items they are doing well.
- 7) Point out areas where the chapter could improve.
- 8) Provide updates on and promote NARFE campaigns and current events (legislative, dues withholding, conferences, PAC, Alzheimer's, etc.).
- 9) Offer suggestions for future programs for chapter meetings.
- 10) Suggest goals for the chapter (prospects, recruitment, retention, dues withholding, emails at NARFE, clean up of membership files, etc.).
- 11) Assess the overall “health” of the chapter (attendance, leadership, gain/loss, atmosphere, financial).

After Visit

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