

# Appendices

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## 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 meetings, 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-retirement 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 Department 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.