



THE NARFE CHAPTER
Chapter Leadership – 101
Orientation and Training
For
Tennessee Federation of Chapters
April 2014

Resources to Help You Begin

All available on the NARFE web site in downloadable PDF files or can be ordered on the F-18



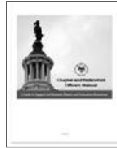
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F-10

CHAPTER
PRESIDENT





I'm a Chapter President, now what do I do?

- Establish local plans to achieve NARFE objectives and goals
- Chair the executive committee and preside at chapter meetings
- Liaison with federation, national office and chapter members
- Encourage and support training
- Appoint committees

Chapter President



- Encourage growth and retention of membership
- Identify, motivate and develop replacements for committee positions
- Ensure each officer and chair is familiar with duties/responsibilities
- Represent chapter at official events

What tools do you need to do your job?



- Be familiar with
 - Chapter/Federation constitutions and bylaws
 - National Articles of Incorporation and bylaws
 - Chapter/Federation Officers Manual (F-10)
 - Past chapter minutes & treasurer's reports
 - Robert's Rules of Order
 - All NARFE publications, forms and reports
 - Online Activities Module (OAM)

Resource Materials



NARFE publications

- NARFE Insider Quarterly News,
- Recruiter's Journal & Quarterly



NARFE Magazine



NARFE Question and Answer Booklet
Federation Newsletter



Resource Materials

- NARFE and Federation Web sites and updates at www.narfe.org & www.narfetn.org
- HQ monthly and quarterly chapter activity reports, i.e. M-112, M-114, A-220, W-101



Chapter Activity Report (M-112) for Chapter 227
Chapter Name: **WISCONSIN**, State: **WI**. This report was prepared on 02/20/14.
[Go Back to Chapter Reports](#), [Print this report](#), [Click here for templates and sample construction](#)

Find 2014 records in your chapter

ID	Name	Address	Exp.	Ch	CR	FC	EC	MR	SR	Phone	Local	ST	ST	Join Date	Address	Expire	Payment Status
Event Annual Membership Roster Report (M-114) for Chapter 227 Chapter Name: WISCONSIN , State: WI . This report was prepared on 12/02/14. Go Back to Chapter Reports , Print this report , Click here for templates and sample construction																	

Chapter Date Address Payment Report (M-101) for Chapter 227
Report made on 11/02/14
[Go Back to Chapter Reports](#), [Print this report](#), [Click here for templates and sample construction](#)

Find 2014 records in your chapter

ID	Name	Special ID	Member Address	Chapter Date	Exp	Birth	Other	Payment
227 Chapter Membership Roster ID: M-114 Exp: M-114								

The Chapter Constitution & Bylaws

- Each chapter should have a constitution and bylaws
- Form F-21 (Chapter Constitution & Bylaws. Updated on 06/09) is good template for bylaws
- New bylaws and any subsequent amendments submitted to HQ for approval.
- Forward any bylaws as they are amended to Federation and Chapter Services at HQ



Other duties



- Establish an executive committee, as appropriate, either by election or appointment per chapter bylaws
- Appoint a nominating committee (unless elected)
- Appoint other officers and standing committees as required or needed

Set meeting agendas



- Preside and conduct chapter business in orderly, impartial manner
- Plan programs that are pertinent, interesting to members and involve them
- Follow the suggested order of business unless specified in chapter bylaws

Suggested Order of Business

1. Call to order
2. Invocation
3. Pledge of allegiance
4. Introduction of members and guests
5. Reading/approval of previous minutes
6. Treasurer's report
7. Officer/committee reports
8. Unfinished business
9. New business
10. Announcements and appointments
11. Program, i.e. speaker, entertainment, etc.
12. Adjournment

Controlling the Meetings



- Always have a written agenda and keep to the order of business
- Allow members to share thoughts but keep to the overall purpose of meeting
- Apply rules uniformly so timely decisions can be made
- Give opportunity for all comments so long as they remain useful and constructive



Controlling the Meetings

- Handle discussions in orderly manner:
 - Each person has chance to speak
 - Keep all speakers to rules of order and to the question
 - Give pro and con speakers equal opportunities
 - State each motion before discussion and vote
 - Where it affects the result, the presiding officer has the same voting rights as any other member if he/she is a member of the assembly or voting body. Unless a vote is by ballot, the chair protects his/her impartial position by exercising his/her voting right only when his/her vote would affect the outcome
 - Be familiar with parliamentary procedures

CHAPTER VICE-PRESIDENT



What does the Vice-President do?

- Supports and backs up the president
- Be prepared to assume responsibilities and function of president, if needed
- May be called upon to perform other duties, as assigned
- May have a first and second vice, if warranted
- Be familiar with chapter operations and duties and responsibilities of other officers/committees



CHAPTER TREASURER



The Treasurer's Roles and Responsibilities

- Keeps all financial records accurate and current.
 - Records chapter dues deposited by HQ and collects chapter dues from social/associate members and other monies owed or collected by chapter
- Review direct deposits of dues from National Office and deposit any other funds received
- Disburses funds as directed by President, Exec committee or chapter's bylaws and policies



Treasurer's Role (Cont'd)

- Makes financial reports each meeting (F-38)
- Reconciles membership records and dues paid
- Prepares budgets and financial reports
- Forwards national/chapter dues from new or renewing members to national treasurer, if needed
- Use F-16 - Dues Transmittal Sheet: New Members or F16R – Dues Transmittal Sheet: Renewals

Treasurer's Role (Cont'd)

- Disburses special/dedicated funds as soon after collection or as required
- Arranges with NARFE HQ for direct deposit for chapter funds
- File annually IRS Form 990-N (e-Postcard) for the chapter. The filing deadline is the 15th day of the 5th month after the chapter's fiscal year (normally May 15th)
- Submit Federation Per Capita Tax
- Turn over all materials to successor



Dues Processing



- Under the NARFE dues system:
 - Members pay national/chapter dues directly to National office
 - National Life Members and Dues Withholding for national dues only can pay to National Office or directly to chapter
- Any check received by chapter for dues should be forwarded to HQ
- Social and associate member dues can be retained by chapter.



What tools do you need to do your job?

- F-38 – Treasurer’s Monthly Report
- F-16 and F-16R – Dues Transmittal Sheet
- Journal or ledger
- Receipt book with carbon
- M-112 and M-114 Reports
- A-220 Chapter Dues Activity Report
- M-130 & 131-C – Recruiting Fee Report & Active Federal Employee Bonus Recruiting Fee
- W-101 – Chapter Dues Advance Payment Report

Maintaining Records



- Post books after each transaction
- At minimum, use two-column journal
- Retain receipts, canceled checks and letters of transmittal involving money
- Reconcile chapter books and bank statement at end of month
- Keep checks with bank statement for audit purposes

Who else do I work with and why?

- Secretary and Membership Chair to:
 - Compare files so chapter roster is accurate
 - Remove deceased members
 - Establish convention delegate numbers and membership numbers for Federation Per Capita Tax based on the M-114 membership roster as published by NARFE Headquarters in October of each year
- Federation Treasurer



CHAPTER SECRETARY





The Secretary's Roles & Responsibilities

- Provides continuity to chapter activities
- Basic job is to:
 - Attend and record minutes of all meetings
 - Notify officers/members of scheduled meetings
 - Maintain roster of chapter officers & members
 - Prepare all correspondence, not exclusive of another officer



The Secretary's Roles & Responsibilities

- Furnish reports and documents to federation and national offices, as required
- Maintain chapter files and permanent documents, IAW Chapter and Federation Officers Manual, F-10 Appendix B
- Order supplies for operations (F-18)
- Works closely with President in preparing agendas
- Turn over all materials to successor

What tools do you need to do your job?



- Be familiar with
 - Chapter/Federation constitutions and bylaws
 - National Articles of Incorporation and bylaws
 - Chapter/Federation Officers Guide (F-10)
 - Robert's Rules of Order
 - NARFE publications and website
 - Monthly chapter newsletter
 - Supply requisition Form (F-18)



Organization - Key to Success



- Be at meeting well before it begins
- Determine if quorum is present
- Record minutes of meeting
- Maintain accurate membership roster
 - Get names of new/lapsed members from treasurer and membership chair
- Keep appropriate officers/committees advised of new members

More Keys to Success



- Maintain copies of constitutions, bylaws, etc and all correspondence, minutes, reports and historical papers.
- Maintain lists of committee appointment and description of functions
- Work closely with treasurer for accurate records and reports



Reporting Requirements

- Submit F-7, Chapter Officer Roster, annually by January 1st (even if no changes are made) and immediately after elections with names, memberships #, addresses and contact information
 - Submit to National Office, Federation President and Secretary either on-line, by fax or mail
 - Provide same contact information on all other committee positions, as soon as known
 - Any additions, deletions and changes in information, report as soon as possible on a separate F-7
 - Any chapter dues changes are reported to NARFE Federation and Chapter Services Department

Online Activities Module

- Chapter Officer Roster F-7 Update Screen:

Chapter Rosters (F-7)

OFFICER TITLE Post Code STATUS MEMBER ID LAST NAME FIRST NAME LAST UPDATE

CHAPTER PRESIDENT	1	ACTIVE	124822	ROBINSON	JOHN W	Thu Jul 18 08:04:10 2014
CHAPTER VICE PRESIDENT	2	ACTIVE	124816	ANDERSON	LEDA	Thu Jul 18 08:04:10 2014
CHAPTER VICE PRESIDENT	3	ACTIVE	124820	WILSON	DAVID W	Thu Jul 18 08:04:10 2014
CHAPTER SECRETARY	4	ACTIVE	124828	HARRIS	KEITH R	Thu Jul 18 08:04:10 2014
CHAPTER TREASURER	5	ACTIVE	124824	HANCOCK	MATTHEW R	
CHAPTER EXECUTIVE BOARD MEMBER	6	ACTIVE	124826	FRANCO	DAVID	
CHAPTER SERVICE OFFICER	8	ACTIVE	124824	ANDERSON	LEDA	Thu Jul 18 08:04:10 2014
CHAPTER SERVICE OFFICER	9	ACTIVE	124822	ANDERSON	LEDA	
CHAPTER SERVICE OFFICER	10	ACTIVE	124828	THORP	LOREN	
CHAPTER SERVICE OFFICER	11	ACTIVE	124820	FRANCO	DAVID	

Be sure that you click on each of these tabs to update your preferences.

More Reports



- In January, send list of all deaths of members during previous year to Federation secretary
- Coordinate submission of materials required from chapters for federation conventions i.e. resolutions/bylaws, list of delegates, delegate credentials
- Keep abreast of record-retention materials



Minutes in Brief

- Record what is done, not what is said
 - No opinions or editorial remarks
- Summarize speeches given at meetings
- Sign and date minutes after "respectfully submitted"
- Type or write legibly in ink
- Have minutes of previous meeting available for vote
- Note date read, approved and/or corrected



Minutes in a Brief

- Record name of who made motions, seconds not necessary
- Prepare original and one copy for secretary file and permanent file...President may want copy
- Secure chapter minutes as they are official records
- Record votes by ballot or show of hand by results only
- Record number of votes only on "sticky" or controversial issues.



Maintaining Chapter Records

- Records are property of the chapter
- Retained records include:
 - Chapter charter, constitution, bylaws, all application for chapter charter (F-19)
 - Federation Convention Resolution Forms
 - Annual Audit or financial review report
 - Chapter ZIP code assignments and changes
 - Record of deceased members
 - Record of chapter property, i.e. flag, banner, etc.
 - Reference Chapter and Federation Officers Manual, F-10, Appendix B

FOR ALL OFFICERS - Help is only a
phone call or email away!

Contact:

Your Federation Vice-President
other Federation Officers and web site
(www.narfetn.org)

Region X Vice-President (www.narferx.org)

Region X Configuration Advisory Board (CAB) Rep

National NARFE Headquarters and web site
(www.narfe.org)