



**NARFE**  
FEDERAL BENEFITS EXPERTS

## NARFE Alzheimer's Federation Coordinator's Manual

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## Contact Information for Supplies and Questions

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Regional Coordinator: \_\_\_\_\_  
\_\_\_\_\_

Chair, National Alzheimer’s Committee: \_\_\_\_\_  
\_\_\_\_\_

Alzheimer’s Association Contact: \_\_\_\_\_  
\_\_\_\_\_

NARFE Events Materials Order Form: [www.alz.org/narfemembers](http://www.alz.org/narfemembers) or  
<https://alz.org/media/Documents/narfe-order-form.pdf>; email to: [narfe@alz.org](mailto:narfe@alz.org)

NARFE-Alzheimer’s newsletter: Sign up at <https://www.alz.org/narfemembers>

## Duties of the Alzheimer's Federation Coordinator

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- Act as a resource and offer assistance to the new Chapter Coordinators as they begin their new terms. Ensure they are in possession of a *NARFE-Alzheimer's Chapter Coordinator's Manual* (FH-25 (05/20)).
- Work with federation executive board and Chapter Coordinators to set annual goals for fundraising.
- Receive contributions from chapters. See Appendix A for the handling procedures used by the chapters. Record contributions on "NARFE Payment Detail Summary Sheet" and send copy of summary sheet (see form on page 6) to your Regional Alzheimer's Coordinator. See Appendix B for guidance on using chapter dues for charitable contributions.
- Once a month send total contributions to the Alzheimer's Association in the pre-addressed envelopes provided by the Association. For complete instructions on handling these funds, see page 8, "NARFE Chapter and Federation Guidelines for Handling Special/Dedicated (S/D) Funds." Checks received by the Alzheimer's Association will be credited for the month they are post-marked. (See "Alzheimer's Association Process for Accounting for NARFE Gifts," page 16.)
- Reconcile contributions with Monthly Project Gift Analysis Report (PGA Report) from the Alzheimer's Association.
- Set up Alzheimer's display table at the federation conferences/conventions with brochures ordered through NARFE Headquarters and the Alzheimer's Association (see form on page 3).
- Request materials from the Alzheimer's Association at 312-335-5828 or email [narfe@alz.org](mailto:narfe@alz.org). Order your supplies at least four weeks prior to your federation conference. The order form can be found at <https://alz.org/media/Documents/narfe-order-form.pdf> or <https://alz.org/narfemembers>.)
- At the federation conference, report on research and money contributed during the past year.
- Conduct workshop for Chapter Coordinators at the federation conference.
- Make suggestions to Chapter Coordinators for raising money.
- Support and handle the Alzheimer's Fundraiser at the federation conference.
- Present Certificates of Appreciation, signed by the NARFE-Alzheimer's National Committee chair and the NARFE national president, during the federation conference. National certificates can be obtained from your regional member of the National Committee. (See page 10 for detailed guidelines on ordering and presenting certificates.)

- Handle Memorial/Honorary Contributions. The Federation Coordinator has the responsibility to:
  - Advise a family when a memorial/honorary donation has been made to NARFE Alzheimer’s Research; and
  - Send a NARFE thank you card to the donor of a memorial/honorary contribution. See pages 14 and 15 for procedures and sample cards that are provided to the Federation Coordinator by the NARFE-Alzheimer’s Regional Coordinator.

## Workshop Preparation

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### TIMETABLE

#### ***Three to four months prior to conference***

- Contact the Federation Conference Committee to request and schedule a time for an Alzheimer’s Workshop for Chapter Coordinators. This may also be an opportunity for a “meet and greet” with Chapter Alzheimer’s Coordinators.

#### ***Four to six weeks prior to conference***

- Order event materials that will be included in the workshop:
  - 1) FH-12 brochure from NARFE Headquarters (*NARFE’s Participation in the National Alzheimer’s Research Program*, revised 01/20) using Form F-18.
  - 2) Sample packets and other materials from the Alzheimer’s Association, Chicago, IL. (See the current order form on pages 3-4. Click the following link to download it: <https://alz.org/media/Documents/narfe-order-form.pdf>.) Email the NARFE Events Materials Order Form to [narfe@alz.org](mailto:narfe@alz.org).
- Send the invitation letter (sample on page 5) to each Chapter Alzheimer’s Coordinator in the federation, informing them of the day and time of the workshop and/or meet and greet. Emphasize the importance of meeting to review and plan the year’s goals and activities.

#### ***Two weeks prior to conference***

- Organize the materials in a format that makes sharing information easy. Involve the coordinators in the session by asking them to talk about what has been successful in their chapters.
- Develop a simple evaluation form, to be passed out at the conclusion of the get-together, that will help you gather feedback from participants.

# Alzheimer's Association Order Form



## Event Materials Order Form

For questions on how to complete this form, please reach out to your NARFE Alzheimer's Association Regional Coordinator. **Email completed order form to [narfe@alz.org](mailto:narfe@alz.org).**

Name _____	Email _____
Phone _____	Chapter Number _____
Ship To: _____	
Event Description _____	
Event Date _____	Need Materials By: _____

**Please note: UPS will not deliver to a P.O. Box.  
The Alzheimer's Association reserves the right to adjust orders if need be.**

Item Number	Description	Total Qty:
214-60-0010	<b>NARFE Envelope</b> No. 10 business reply envelope. 25/pack (Limit 5 packs)	
214-65-0013	<b>NARFE Thank You Card with Envelope</b> Co-branded 6" x 4" card with envelope that includes Alzheimer's Association and NARFE logos. 25/pack (Limit 10 packs)	
214-65-0001	<b>NARFE Pens</b> This Bic pen includes NARFE and Alzheimer's Association branding. Writes in black ink. 10/pack (Limit 10 packs)	
214-60-0004	<b>NARFE Donation Box</b> Donation box featuring a slot top and the NARFE and Alzheimer's Association logos on each side. 5/pack (Limit 2 packs)	
214-60-0001	<b>NARFE Stick-On Notes</b> These stick-on notes are co-branded with the NARFE and Alzheimer's Association logos. 50 sheets in a pad. 5/pack (Limit 10 packs)	
214-65-0009	<b>NARFE Tabletop Poster</b> Tabletop display with easel-back stands 8.5" x 14". Includes NARFE and Alzheimer's Association logos to promote the relationship between the two organizations. (Limit 10)	
214-10-0001	<b>NARFE Handout Postcard</b> Co-branded 8.5" x 6" card that highlights the Alzheimer's Association/NARFE care and support webpage. 50/pack (Limit 5 packs)	
214-30-0001	<b>NARFE Magnet</b> Co-branded 3.5" x 2" magnet with 24/7 Helpline number and Alzheimer's/NARFE member webpage. 25/pack (Limit 5 packs)	

Item Number	Description	Total Qty:
663-80-0007	<b>Alzheimer's Association Balloons</b> These balloons come in an assortment of three colors – white, light purple, dark purple – with the Alzheimer's Association logo. 25/pack (Limit 20 packs)	
663-80-0009	<b>Alzheimer's Association Purple Pen</b> Alzheimer's Association branded pens with purple ink. 12/pack (Limit 20 packs)	
663-80-0008	<b>Alzheimer's Association Pencils</b> No. 2 purple pencils with Alzheimer's Association logo. 100/pack (Limit 25 packs)	
663-90-0002	<b>Alzheimer's Association Gold Mission Lapel Pin</b> Display your support for the cause with this gold butterfly-clasp lapel pin inspired by the Alzheimer's Association mission symbol. (Limit 25)	
663-90-0003	<b>Alzheimer's Association Awareness Wristband</b> Proudly show your support for the cause with these Alzheimer's Association wristbands. 5/pack (Limit 30 packs)	
770-10-0024	<b>Alzheimer's Basics Card</b> This information card features basic information and statistics about Alzheimer's disease and highlights ways people can join the cause. 50/Pack (Limit 10 packs)	
773-10-0005	<b>10 Ways to Help a Family Brochure</b> This two-sided card features 10 tips for helping a family living with Alzheimer's. The card also includes information about how to get involved with the cause. 50/Pack (Limit 10 packs)	
770-10-0028	<b>Online Caregiver Resources</b> Use this brochure to promote the online resources available through the Alzheimer's Association website at alz.org, including ALZConnected®, Alzheimer's Navigator, and the Alzheimer's Association & AARP Community Resource Finder. 50/Pack (Limit 10 packs)	
770-10-0018	<b>Communication Brochure</b> This brochure offers guidance for caregivers on how to communicate with a person with Alzheimer's at each stage of the disease. 50/Pack (Limit 10 packs)	
773-10-0004	<b>I Have Younger-Onset Alzheimer's Brochure</b> This brochure addresses a range of issues specific to individuals living with younger-onset Alzheimer's, including diagnosis, personal and professional relationships, and planning for the future. 50/Pack (Limit 10 packs)	
214-65-0015	<b>Brochure Packet</b> This packet includes five collateral pieces: Alzheimer's Basics Card, 10 Warning Signs Bookmark, 10 Ways to Help a Family Brochure, Online Caregiver Resources and the 24/7 Helpline Information Card. Please see individual items for product descriptions. (Limit 50 Packs)	
ENGLISH 770-15-0001 SPANISH 600-77-0001	<b>10 Warning Signs Bookmark</b> This two-sided piece features the 10 Warning Signs of Alzheimer's Disease, the importance of early detection and the 24/7 Helpline phone number. 50/Pack (Limit 10 packs)	<input type="checkbox"/> ENGLISH _____ <input type="checkbox"/> SPANISH _____
ENGLISH 770-15-0002 SPANISH 600-76-0002	<b>10 Warning Signs Brochure</b> This brochure explains the 10 Warning Signs of Alzheimer's Disease, describes the difference between normal aging and dementia, and suggests resources to help. 50/Pack (Limit 10 packs)	<input type="checkbox"/> ENGLISH _____ <input type="checkbox"/> SPANISH _____
ENGLISH 770-80-0001 SPANISH 600-80-0013	<b>24/7 Helpline Information Card</b> Use this card to promote awareness of the Alzheimer's Association 24/7 Helpline, a free service providing around-the-clock information and support. 50/Pack (Limit 10 packs)	<input type="checkbox"/> ENGLISH _____ <input type="checkbox"/> SPANISH _____
ENGLISH 770-10-0001 SPANISH 600-76-0001	<b>Caregiver Stress Brochure</b> This brochure contains helpful resources for caregivers and advice on how to recognize and manage stress. 50/Pack (Limit 10 packs)	<input type="checkbox"/> ENGLISH _____ <input type="checkbox"/> SPANISH _____
ENGLISH 770-10-0002 SPANISH 600-76-0004	<b>I Have Alzheimer's Brochure/ Living with Alzheimer's (Spanish)</b> This brochure provides individuals with Alzheimer's information about dementia, living with the disease and planning for the future. 50/Pack (Limit 10 packs)	<input type="checkbox"/> ENGLISH _____ <input type="checkbox"/> SPANISH _____

## Sample Invitation Letter

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DATE: Month x, 20xx

TO: All STATE NARFE Chapter Alzheimer's Coordinators

FROM: (Your Name), State Federation Alzheimer's Coordinator

Re: Alzheimer's Workshop for Chapter Coordinators

The State Federation of the National Active and Retired Federal Employees Association Conference will meet in (City, State, Month, Date(s), 20xx). The conference will be held at the (location), starting on (day and date), with registration opening at (time).

You are invited to the above workshop that I will be conducting from (time periods) on (day and date) in the (room location in conference location). Our goal during the meeting is to get acquainted, share ideas for raising funds, broaden our knowledge of the disease through discussion and materials, and learn the procedures of keeping records and recognizing contributors to the NARFE-Alzheimer's Research campaign.

We have not had a workshop like this for many years, and we would like to build on our successes by having an engaging workshop. Please make time for this important meeting for Chapter Alzheimer's Coordinators. We work closely with the Alzheimer's Association in Chicago, IL, and it will provide materials that will be of interest to you.

I hope to see you on (day, date and time).



# Alzheimer's Association – NARFE Payment Detail Summary Sheet

All donations forwarded to the Alzheimer's Association by the Federation Alzheimer's Coordinator must be detailed line-by-line on the *Alzheimer's Association - NARFE Payment Detail Summary Sheet* (see below).

*If the Federation Alzheimer's Coordinator or federation treasurer does not have this form, it should be requested from the Regional Alzheimer's Coordinator.*

Note that the Source Code will remain constant: CNAGM1900NA000. Refer to the Project Code List for the correct project code for NARFE chapter and NARFE state federation. A sample of the Project Code List is shown on page 7.

ALZHEIMER'S ASSOCIATION - NARFE PAYMENT DETAIL SUMMARY SHEET												
<b>NARFE GIFT DETAIL SPREADSHEET</b> Region: Coordinator Name: Coordinator Email: Source Code: CNAGM1900NA000 Date:					<b>ALL FIELDS MUST BE COMPLETED FOR EACH LINE DO NOT ENTER SEE CHECK FOR DETAILS</b>							
Item No.	Check Date	Check Number	Check Amount	Project Code	First Name (Donor)	Last Name (Donor)	Street Address <small>(Where gift acknowledgement letter will go)</small>	City	State	Zip Code	In Memorial or Honor Of (Optional)	
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
<b>TOTAL AMOUNT</b>			<b>\$0.00</b>									



## Chapter and Federation Project Codes

A sample of Chapter Project Codes is shown below. See Appendix C for a list of the Project Codes for Federation States. *You can obtain a list of your federation's chapter project codes from your Regional Coordinator.*

PROJECT CODE	REGION/FEDERATION
NC0001	NARFE #0001 – WASHINGTON D.C. CHAPTER
NC0002	NARFE #0002 – TOPEKA, KS CHAPTER
NC0003	NARFE #0003 – LOS ANGELES, CA CHAPTER
NC0004	NARFE #0004 – SAN DIEGO, CA CHAPTER
NC0005	NARFE #0005 – NORFOLK, VA CHAPTER
NC0006	NARFE #0006 – CHICAGO, IL CHAPTER
NC0007	NARFE #0007 – ARLINGTON, VA CHAPTER
NC0009	NARFE #0009 – CAVITE CITY, PI CHAPTER
NC0010	NARFE #0010 – PASADENA, CA CHAPTER
NC0011	NARFE #0011 – SPRINGFIELD, MO CHAPTER
NC0012	NARFE #0012 – PORT HURON, MI CHAPTER
NC0013	NARFE #0013 – PAWTUCKET, RI CHAPTER
NC0014	NARFE #0014 – CHARLES HOGG, OH CHAPTER
NC0015	NARFE #0015 – OLANGAPO, PI CHAPTER
NC0016	NARFE #0016 – VALLEJO, CA CHAPTER
NC0017	NARFE #0017 – ST. PETERSBURG, FL CHAPTER
NC0018	NARFE #0018 – STOCKTON, CA CHAPTER
NC0019	NARFE #0019 – JOPLIN, MO CHAPTER
NC0020	NARFE #0020 – GREATER KANSAS CITY, MO
NC0021	NARFE #0021 – LONG BEACH, CA CHAPTER
NC0022	NARFE #0022 – MUSKOGEE-AZAELA, OK CHAPTER
NC0023	NARFE #0023 – MANNHATTAN-BRONX, NY
NC0024	NARFE #0024 – CIVIL SERVICE RET. ASSN, RP
NC0025	NARFE #0025 – JACKSON, MI CHAPTER
NC0026	NARFE #0026 – BACOR-CAVITE, PI CHAPTER
NC0027	NARFE #0027 – BUFFALO BILL, KS CHAPTER
NC0028	NARFE #0028 – PETERSBURG, VA CHAPTER
NC0029	NARFE #0029 – PORTLAND, OR CHAPTER
NC0030	NARFE #0030 – FORT WORTH, TX CHAPTER
NC0031	NARFE #0031 – PHILADELPHIA CENTER, PA CHAP.
NC0032	NARFE #0032 – SPOKANE, WA CHAPTER
NC0033	NARFE #0033 – ST. AUGUSTINE, FL CHAPTER
NC0034	NARFE #0034 – GREATER BOSTON, MA CHAPTER
NC0035	NARFE #0035 – DAYTON, OH CHAPTER

## NARFE Chapter and Federation Guidelines for Handling Special/Dedicated (S/D) Funds

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*[The following is excerpted from an August 2, 2001 memo written by then-National Treasurer Charles L. Fallis. This is still the current procedure.]*

Instructions contained in documents such as the F-10, “Chapter and Federation Officers Manual,” adequately describe treasurers’ requirements in connection with handling dues revenue. However, they contain little or no guidance for handling special/dedicated (S/D) funds such as the NARFE-PAC Fund, the Alzheimer’s Fund, the Woodruff Building Fund and the NARFE/FEEA Scholarship and Disaster Funds. As a consequence, chapters and federations have devised their own disparate ways of dealing with these distinctive funds. The purpose of this paper is to provide uniform guidance to treasurers that will assist them in reporting and accounting for S/D funds, and at the same time assure that chapters and federations receive credit for all such funds collected.

Basically, all S/D funds, no matter their source or purpose, that are collected in the name of a chapter or federation, or under color of their charters, should be separately accounted for and disbursed by the treasurer or secretary/treasurer. These elected fiduciaries/trustees are charged with the specific responsibility for handling funds and are authorized by their bylaws to perform that function.

General Journal entries showing the dates and the nature of individual transactions along with receipts and disbursements should include S/D fund activity as well as dues activity. Generally, monies for these S/D funds will be in three forms: cash, checks payable to a chapter or federation intended for a particular S/D fund, and checks made payable directly to the intended S/D fund. All such monies should be recorded and appropriately identified by fund in the General Journal.

After recording the receipt of all S/D fund monies in the journal, those funds consisting of checks made payable to a chapter or a federation, but meant for one of the S/D funds, along with related cash, should be deposited in the chapter or federation checking account. The treasurer should draw a check on the chapter or federation account in an identical amount. That check should be made payable to the entity for whom the S/D funds are intended and forwarded to that entity, along with any contributors’ checks made directly payable to that organization. Again, journal entries should reflect such disbursements as well as receipts.

Form F-38, “Treasurer’s Monthly Report,” or whatever counterpart form is used in federations, should report S/D fund activity on the “Miscellaneous (itemize)” lines under both the “Receipts” and “Disbursements” sections of the form. Ordinarily these will be in and out entries in identical amounts reflecting that; after recording, the treasurer forwards the S/D funds to whichever organization, association or other entity the chapter or federation has designated to receive them.

Accordingly, there should be no carry-over balances in these accounts. Contributors who present checks made payable to NARFE intended for any of these S/D funds should be advised that their contributions, as drawn, are not tax deductible. However, checks made payable directly to the Alzheimer’s Association or to NARFE/ FEEA are tax deductible. This disparity arises from the fact that contributions to nonprofit organizations registered under Section 501(c)(3) of the Internal Revenue Code—as is the case with these two organizations—are tax deductible, while 501(c)(5) organizations, such as NARFE, are not granted that privilege. NARFE has chosen not to register as a 501(c)(3) organization because political lobbying—one of NARFE’s main enterprises—is prohibited to organizations so registered. Please encourage those who contribute directly to these two S/D funds to do so through their chapters or federations so that NARFE will receive credit for the contributions.

## Alzheimer's Appreciation Certificates

The NARFE-Alzheimer's National Committee members agreed at the June 2003 meeting, held at NARFE HQ in Alexandria, VA, that a limit of TWO criteria-based national certificates would be given to the Regional Coordinator, for distribution to each Federation Coordinator per year. These "Citation for Distinguished Service" awards are signed by the NARFE-Alzheimer's National Committee chair and the national president.

The certificates may be ordered with the seal and ribbon affixed. If a computer will be used to imprint the chapter or name, order the certificates signed but with the seal and ribbon to be affixed later.

These two certificates should be awarded to recognize the chapter(s) within the federation that have the largest donation per capita and highest amount raised.

New certificates designed specifically for Chapter Coordinators and Federation Coordinators to use are available electronically from the Regional Alzheimer's Coordinator. These certificates may be presented to individuals or chapters that deserve special recognition.



## NARFE Gift Submission Process

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Once a gift is made, there are many steps and departments that help to ensure proper documentation and credit to not only the NARFE research fund, but also the appropriate federation/region and individual who made the gift. Below is a snapshot of that process, which further illustrates the importance of submitting accurate and thorough information with each gift.

Federation Coordinator(s) submit Gifts and NARFE Payment Detail Summary Sheet

- Alzheimer's cashiering
- Donor services
  - Quality control
  - Donor services final review
  - Gift acknowledgment letter sent
    - Quality control specialist sends monthly Project Gift Analysis Report (PGA) to NARFE national chair
    - NARFE national chair sends monthly PGA reports to Regional Coordinators
      - Regional Coordinators
        - Sends monthly PGA reports to appropriate Federation Coordinator
        - Review for accuracy.

All gifts must be submitted with the NARFE Payment Detail Summary Sheet (see page 6). This will help to reduce the amount of miscoded gifts. Please note that all fields must be completed. The summary sheet requires the donor(s) information (name, address, etc.) for which the gift will be recorded under and to whom the gift acknowledgment letter will be sent.

Please refer to project codes document to find the correct code for your region. Note that NARFE has one source code, so this will be consistent across all regional reports and will not change.

### **NOTES:**

Reminder that monthly Project Gift Analysis Report (PGA) and the Transaction Summary reports are one-time reports; any adjustments or re-coding will not be found on these reports.

The monthly Transaction History Report shows when a gift comes in and if the region or project code is unknown or if all information has not been submitted. These gifts are counted towards NARFE's overall goal and credited towards the research grants, but are not coded to the appropriate region until complete information is provided from the NARFE federation to the Alzheimer's Donor Services team via the new submission process outlined on the next page.

## What Should I Do When I Notice a Gift Missing or Incorrectly Coded?

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Please review the Transaction Summary report to see if the missing or incorrectly coded gift is on the report. Send Donor Services ([alznarfe@alz.org](mailto:alznarfe@alz.org) with a cc to Alicia Dorman at [aadorman@alz.org](mailto:aadorman@alz.org)) a request to move the funds from the general NARFE account to the specific region (project code) you are requesting. Note, this does not change the overall amount NARFE is getting credit for, just the region/federation that is getting the credit.

For any missing gift inquiry/gift adjustment that you may have, please email [alznarfe@alz.org](mailto:alznarfe@alz.org) and [aadorman@alz.org](mailto:aadorman@alz.org) and attach or notate any information that will be helpful in locating the gift within the database.

Upon submitting a missing gift or gift re-coding request to [alznarfe@alz.org](mailto:alznarfe@alz.org) (and [aadorman@alz.org](mailto:aadorman@alz.org)), an automated response will be sent letting you know the request has been received. Once the issue is resolved, the gift that was miscoded will appear on the NARFE Gift Adjustment Activity Log, which will list any transaction activity that was adjusted to an updated project code.

While these new procedures will help reduce the amount of gifts that are missing or miscoded, there may still be instances where the Gift Acknowledgment Letter needs to be re-sent or sent to someone else. Please email Donor Services and Alicia Dorman with these requests to: [alznarfe@alz.org](mailto:alznarfe@alz.org) and [aadorman@alz.org](mailto:aadorman@alz.org).

Effective April, 2019, the Donor Services team will acknowledge on a monthly basis, via the NARFE Gift Adjustment Activity Log, the discrepancies brought forth by NARFE committee members and show adjustments/code reconciliation. This will help to ensure that Regional Coordinators know when missing or miscoded donations have been found or adjusted and have been credited to the correct region.

# NARFE Gift Adjustment Activity Log

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The NARFE Gift Adjustment Activity Log is issued monthly to the national chair by Alzheimer’s Association. The chair then distributes the log to each of the 10 Regional Coordinators who in turn distribute it to the appropriate Federation Coordinator.

NARFE GIFT ADJUSTMENT ACTIVITY LOG

Item No.	CHECK DATE	CHECK NUMBER	GIFT AMOUNT	FIRST NAME (DONOR)	MIDDLE (DONOR)	LAST NAME (DONOR)	STREET ADDRESS	CITY (DONOR)	STATE (DONOR)	ZIP CODE (DONOR)	OLD PROJECT CODE	ADJUSTED PROJECT CODE	AFFECTED STATE FEDERATION (Y / N)	ADDITIONAL COMMENTS
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														

The spreadsheet contains 15 columns containing the following information:

- Item No.
- Check Date
- Check Number
- Gift Amount
- First Name (Donor)
- Middle (Donor)
- Last Name (Donor)
- Street Address
- City (Donor)
- State (Donor)
- Zip Code (Donor)
- Old Project Code
- Adjusted Project Code
- Affected State Federation (Y/N)
- Additional Comments



## Memorial Procedures and Memorial and In Honor of Cards

When memorial/honorary checks are received (made payable to “NARFE-Alzheimer’s Research”), the following listed information should accompany the contribution when it is forwarded by the Federation Alzheimer’s Coordinator to the Alzheimer’s Association. It can be submitted along with your other monthly submissions. The Alzheimer’s Association will mail a tax-deductible receipt letter to the contributor using the name and address recorded on the Alzheimer’s Association NARFE Payment Detail Summary Sheet (see page 6).

It is the responsibility of the Federation Alzheimer’s Coordinator to mail:

1. Memorial/honorary donation acknowledgment cards to the family of the deceased, notifying them of the donation; and
2. Thank you cards to the donors. Of course, the Chapter Coordinator may also wish to mail thank you cards.

The Federation Coordinator has been provided with special printed cards with the NARFE logo. The following information is needed from the Chapter Coordinator to communicate with the family and donor:

- Notation on the chapter transmittal form of any check given as a memorial or in honor of;
- Name of deceased or person being honored;
- Name and mailing address of family member (to notify that a donation has been received);
- Name and mailing address of donor (or donors) if it is different from the name on the check. This is not only used by the Federation Coordinator, but also the family to send a thank you note.

*See page 15 for sample copies of the federation donor acknowledgment and memorial/ honorary donation cards.*

These cards are available from your NARFE-Alzheimer’s Regional Coordinator whom you may list below. (The name and email address are listed at [www.narfe.org](http://www.narfe.org) under Special Programs – Alzheimer’s Fund.)

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## Samples of Donor Acknowledgment, Memorial and In Honor of Donation Cards

*We are pleased to inform you that a  
Contribution for  
Alzheimer's Disease Research  
Has been made  
In the memory of*

By \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*National Active and Retired Federal Employees Association*

*Your contribution for  
Alzheimer's Disease Research  
Is greatly appreciated*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*National Active and Retired Federal Employees Association*

*We are pleased to inform you that a  
Contribution for  
Alzheimer's Disease Research  
Has been made  
In honor of*

By \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*National Active and Retired Federal Employees Association*

## Alzheimer's Association Process for Accounting for NARFE Gifts

NARFE Federation Alzheimer's Coordinator or federation treasurer should mail check(s), along with the Alzheimer's Association – NARFE Payment Detail Summary Sheet to the National Office of the Alzheimer's Association in Chicago, Illinois.

- Use the envelope provided by Alzheimer's Association for NARFE donations. This expedites the gift entry and acknowledgment process.

Alzheimer's Association Cashiering Department opens all mail.

- Checks are photocopied upon receipt and put into batches.
- NARFE checks are endorsed, then deposited in the bank within 24 hours of receipt.
- The batches are hand delivered to the Donor Services Center (DSC) for coding.

Donor Services Center (DSC)

- The "NARFE Project Code" identified on the Alzheimer's Association – NARFE Payment Detail Summary Sheet allows the amount of the check to count toward the NARFE total.
- Credits each NARFE chapter or federation based upon the NARFE project code for securing the donation.

Within 24 hours of receipt of the check, Revenue Support Services enters the gift into the Alzheimer's Association's computer database using the name that appears on the check (e.g., "John Smith," "NARFE Chapter 147," etc.).

- All gifts entered have the NARFE code and the code for the chapter or federation that sent in the gift.
- Within three business days, a thank you note with tax-deductible language is mailed to the donor whose name appears at the top of each check.

Around the middle of each month, the Alzheimer's Association runs two reports summarizing the previous month's activity:

- A report of every single NARFE contribution received in the previous month
- A report that lists contributions by federation

These Federation Totals Reports are shared with each member of the NARFE-Alzheimer's National Committee via the chair.

The Alzheimer's Association now accepts credit card donations for the NARFE-Alzheimer's Research Fund. To link directly to the NARFE donation page on the Alzheimer's Association website, go to [www.alz.org/narfe](http://www.alz.org/narfe).

## Appendix A

### Handling Procedures for Special/Dedicated Funds

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A “Special/Dedicated Fund” includes NARFE-PAC, Woodruff Building Fund, Federal Employee Education & Assistance Fund (NARFE-FEEA), and Alzheimer’s Fund. See page 8 for the memo from National Secretary/Treasurer’s office on handling S/D funds.

- All checks must be made payable to “**NARFE-Alzheimer’s Research**” in order to be tax deductible. Checks meant for the Alzheimer’s Fund but made payable to your chapter and deposited to your chapter treasury are not tax deductible. Checks and cash may be deposited to the chapter treasury with the appropriate journal entry for the deposits and disbursements. There should not be any carry-over balance in the chapter treasury from month to month.
- As stated above, contributions to any of the Special/Dedicated Funds must be accounted for separately and not mixed in with dues money. *See the important information regarding the use of membership dues toward charitable donations in Appendix B.*
- Keep a journal of checks received and forwarded, noting:
  - 1) Donor name.
  - 2) Check number and date.
  - 3) Check amount.
  - 4) If it is a memorial/honorary check.
  - 5) Date forwarded to Federation Alzheimer’s Coordinator. (See page 6 for a copy of the Alzheimer’s Association—NARFE Payment Detail Summary Sheet to be used.)
- All donations should be mailed to the Federation (State) Coordinator immediately following chapter meeting. **Make sure all checks are made out to ‘NARFE-Alzheimer’s Research’ and a chapter number noted on the memo line.** Enclose the checks with the Alzheimer’s Association—NARFE Payment Detail Summary Sheet transmittal form and mail to the Alzheimer’s Association in Chicago, IL.

## Appendix B

# Dues Money Should Not Be Used for Charitable Contributions

From time-to-time, the Office of the National Secretary/Treasurer receives calls or email messages regarding whether chapters can use membership dues to make donations to charitable organizations. Here is the explanation of why this is not permissible.

NARFE has always encouraged chapters to become involved in local community activities. One of the ways they can do this is through making donations to charitable organizations. A large number of chapter members make donations to the NARFE-Alzheimer's Research Fund, the NARFE-FEEA Scholarship and Disaster Funds, and to other like programs. These kinds of activities are not directly related to NARFE's mission and donations are strictly voluntary on the part of members.

Article I, Section 3, of the National Bylaws authorizes chapters to collect dues from its members to carry out the activities of the chapter. These activities must relate to the primary mission of NARFE. Rule 4 C specifically describes the objectives that chapters are to undertake. Even though these guidelines are broad and general, under no circumstances may membership dues be used to make a donation to a charitable organization. Membership dues must be used only to support association objectives.

All monies collected, other than for NARFE-PAC, whether through the national dues-collection system, fundraising activities or other methods, must go through the chapter treasury. When collected these monies become dedicated funds and must be used for the purpose intended or collected. **Monies collected for different reasons must not be commingled. The chapter treasurer must maintain a separate account in the financial records for each of these types of funds.** The chapter treasurer should use a chapter check to disburse funds from these accounts. Any questions regarding the disbursement of funds should be addressed to the National Secretary/Treasurer.

*—This article was written by Nathaniel Brown, Past National Secretary, and published in Quarterly News, October 2010.*

Note: The accuracy of this article was re-confirmed by the National Executive Board on March 3, 2011.

Note: The third paragraph was updated September 2015 to reflect the revision of NARFE National Bylaws adopted at the 2014 National Convention.

Noted: The third paragraph was updated August 2018 to reflect the revision of the NARFE National Bylaws adopted at the 2016 National Convention.

## Appendix C Project Codes for Federation States

### NARFE PROJECT CODES BY STATE

Alzheimer's Association: May 2019

PROJECT CODE	STATE
NS0001	NARFE State Federation – Alaska
NS0002	NARFE State Federation – Alabama
NS0003	NARFE State Federation – Arkansas
NS0004	NARFE State Federation – Arizona
NS0005	NARFE State Federation – California
NS0006	NARFE State Federation – Colorado
NS0007	NARFE State Federation – Connecticut
NS0008	NARFE State Federation – District of Columbia
NS0009	NARFE State Federation – Delaware
NS0010	NARFE State Federation – Florida
NS0011	NARFE State Federation – Georgia
NS0012	NARFE State Federation – Hawaii
NS0013	NARFE State Federation – Iowa
NS0014	NARFE State Federation – Idaho
NS0015	NARFE State Federation – Illinois
NS0016	NARFE State Federation – Indiana
NS0017	NARFE State Federation – Kansas
NS0018	NARFE State Federation – Kentucky
NS0019	NARFE State Federation – Louisiana
NS0020	NARFE State Federation – Massachusetts
NS0021	NARFE State Federation – Maryland
NS0022	NARFE State Federation – Maine
NS0023	NARFE State Federation – Michigan
NS0024	NARFE State Federation – Minnesota
NS0025	NARFE State Federation – Missouri
NS0026	NARFE State Federation – Mississippi
NS0027	NARFE State Federation – Montana
NS0028	NARFE State Federation – North Carolina
NS0029	NARFE State Federation – North Dakota
NS0030	NARFE State Federation – Nebraska
NS0031	NARFE State Federation – New Hampshire
NS0032	NARFE State Federation – New Jersey
NS0033	NARFE State Federation – New Mexico
NS0034	NARFE State Federation – Nevada
NS0035	NARFE State Federation – New York
NS0036	NARFE State Federation – Ohio
NS0037	NARFE State Federation – Oklahoma

NS0038	NARFE State Federation – Oregon
NS0039	NARFE State Federation – Pennsylvania
NS0040	NARFE State Federation – Philippines
NS0041	NARFE State Federation – Puerto Rico
NS0042	NARFE State Federation – Rhode Island
NS0043	NARFE State Federation – Panama
NS0044	NARFE State Federation – South Carolina
NS0045	NARFE State Federation – South Dakota
NS0046	NARFE State Federation – Tennessee
NS0047	NARFE State Federation – Texas
NS0048	NARFE State Federation – Utah
NS0049	NARFE State Federation – Virginia
NS0050	NARFE State Federation – Vermont
NS0051	NARFE State Federation – Washington
NS0052	NARFE State Federation – Wisconsin
NS0053	NARFE State Federation – West Virginia
NS0054	NARFE State Federation – Wyoming







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**800-456-8410**

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**NARFE.org**