



NARFE
FEDERAL BENEFITS EXPERTS

Chapter and Federation Officers Manual

A Guide to Support and Maintain Chapter and Federation Operations

Using this manual, F-10:

There may be instructions that have been overtaken by five Bylaws updates and two Policy Manual updates. A current in-depth update is being accomplished and should be on the website very soon.

If additional information or a review of something you know does not sound right, do not hesitate to contact the National Secretary/Treasurer at natsectreas@narfe.org or (571)483-1281.

Kathryn Hensley
National Secretary/Treasurer

Contents

This manual provides a reference guide to assist NARFE officers in managing chapter and federation activities, and in performing their duties more efficiently. Outgoing officers should ensure their successors are aware of this manual to assist in a smooth transition of leadership.

National Headquarters will furnish, upon request, all available materials and supplies necessary to support chapter and federation operations.

Suggestions for improving this manual are welcome.

Send to:

National Secretary/
Treasurer

NARFE

606 N. Washington St.

Alexandria, VA 22314

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NARFE's Mission Statement:

To support legislation and regulations beneficial to federal civilian employees and annuitants and potential annuitants under any federal civilian retirement system and to oppose those detrimental to their interests.

To promote the general welfare of federal civilian employees and annuitants and potential annuitants, to advise and assist them with respect to their rights under retirement, health, and other employee and retiree benefits laws and regulations, and to represent their interests before appropriate authorities.

To cooperate with other organizations and associations in furtherance of these general objectives.

Section One: NARFE Members

THE INDIVIDUAL MEMBER

The effectiveness of NARFE begins with the individual member. Each member is a valuable asset in building a strong and unified NARFE.

What Are the Benefits of NARFE Membership?

- ❖ Powerful representation and advocacy before Congress, the Office of Personnel Management, and the White House.
- ❖ *NARFE Magazine*, the prime source of information and guidance on critical legislation and benefit issues.
- ❖ Members-only section of the NARFE website with up-to-date information and a Legislative Action Center.
- ❖ Access to the NARFE Federal Benefits Institute educational resources – webinars, white papers and other events.
- ❖ Access to a team of Federal Benefits Service specialists for answers to complex questions.
- ❖ Legislative eAlerts on congressional business directly affecting the federal community.
- ❖ Scholarship and disaster-relief grant qualification.
- ❖ Members-only eligibility for special discounts on products and services.

Who Can Join NARFE?

Membership is open to civilians who are or will be eligible to receive an annuity or survivor annuity from the federal retirement program of an agency of the United States government, including:

- ❖ Retirees
- ❖ Active employees
- ❖ Spouses and surviving spouses of those eligible to join NARFE
- ❖ Former employees
- ❖ A former spouse who is legally entitled to a federal survivor annuity

Potential members can join:

1. **By mail:** Fill out and return a membership application found in the F-135 brochure and in every issue of *NARFE Magazine*;
2. **Online:** Visit and join online at www.narfe.org; or
3. **By phone:** Call toll-free, 800-456-8410.

Section Two: Chapter Officers and Operations

NARFE CHAPTERS

Local Chapters: organized within a specific area of a state for the convenience of those members living within that area.

All chapters are encouraged to provide the “grass-roots advocacy” so critical in advancing NARFE’s mission: protecting the earned retirement benefits of all civil service annuitants—both NARFE members and nonmembers.

DUTIES OF CHAPTER OFFICERS

Officers’ duties are prescribed in chapter bylaws, or the chapter president may assign duties in accordance with applicable bylaws and NARFE policies.

If you are a chapter officer with an email address, you must accept NARFE email. Save time, expense and reduce errors by using the NARFE website. The most current versions of forms and guides may be downloaded. See Appendix H for more information.

President

- ❖ Presides* at the chapter and executive committee meetings and conducts business in an orderly, impartial manner;
- ❖ Ensures that at least a portion of chapter meetings focuses on NARFE’s mission;
- ❖ Is familiar with NARFE’s organizational structure, the National Bylaws (FH-4), the respective chapter and federation bylaws, policies and procedures at all levels and *Robert’s Rules of Order Newly Revised*;
- ❖ Appoints standing and special committees as needed;
- ❖ In collaboration with the Treasurer, ensures the IRS form 990N (ePostcard) is filed on the IRS website annually by May 15.
- ❖ Ensures that each officer and committee member is provided with the appropriate information to fulfill the duties of each position and follows up to ensure they are operating effectively; and ensures that all required reports are sent to the respective federation and NARFE Headquarters in a timely manner.

Vice President (Includes Executive Vice President and all other VPs)

- ❖ Presides at chapter and executive committee meetings in the absence of the president;
- ❖ May be appointed or elected to oversee specific areas of responsibility, such as legislation or membership;

***Note for presiding officers:** Parliamentary rules provide a common-sense method under which an organization can base concerted action on the will of the majority, but only after reasonable discussion. The presiding officer is responsible for protecting the minority’s rights, which include having the right to be heard. (The majority can usually take care of itself.) Rules should be applied so as to permit the group to achieve its major purpose: taking action to make decisions within a reasonable time.



National Active and Retired
Federal Employees Association
606 North Washington Street
Alexandria, Virginia 22314-1914
(703) 838-7760 - FAX (703) 838-7783

NARFE Chapter Officer Roster

Term 20__ to 20__

INSTRUCTIONS:

Note: This may be submitted online at www.narfe.org/oam

1. PLEASE READ THIS ENTIRE FORM CAREFULLY BEFORE FILLING IT OUT.

- Every office is assigned a specific code entered in the computer database in sequence to speed entry. Please do NOT change or type over titles not used by your chapter. Check box next to title if the officer listed is a new officer.
- This form must be submitted only by one of the following **chapter officers: President, 1st VP, Secretary, Secretary/Treasurer or Membership Chair.**
- All chapters are required, **by January 1 of each year**, to send a complete listing of all chapter officers (elected and appointed) and their chapter's dues to the **NARFE Office, their Federation President and Secretary**, and/or other requesters. Chapters are encouraged to report all changes in chapter officers and chapter dues changes whenever they occur.
- All chapter dues changes received at the National Office require the effective date of the dues change and require a minimum notice of **90 days** to become fully effective.
- All chapter officers are required to be a national and chapter member.
- This completed and signed form should be sent for processing to: NARFE Federation and Chapter Services F-7 Unit 606 N. Washington St. Alexandria, VA 22314-1914

Chapters are encouraged to submit their changes and required annual update to NARFE online. The online system saves time and eliminates errors and is automatically sent to the federation president and secretary. This paper form should be used only by chapters that do not have computer access for this required reporting.

<p>President 1 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>1st Vice President 2 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>2nd Vice President 2A <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>3rd Vice President 2B <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>4th Vice President 2C <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Secretary 3 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Treasurer 4 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Secretary/Treasurer 5 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p>	<p>Leg. Chair (Nat'l Legislation) 6 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Membership Chair 7 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Membership Chair Retention 7A <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Public Relations 8 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Service Officer 9 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Chapter Service Committee 10 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Newsletter Editor 11 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p>
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Figure 1: F-7, Chapter Officer Roster

- ❖ Performs other duties specified in the bylaws or as assigned by the president; and
- ❖ Assists the president in promoting NARFE's mission.

Secretary (or Secretary/Treasurer)

- ❖ Records the minutes of chapter meetings;
- ❖ Maintains chapter files and preserves all permanent official documents, including the charter, bylaws and other organizational papers;
- ❖ Maintains the roster of chapter members, officers and committee chairs;
- ❖ Reports changes in officers, committee chairs and chapter dues to National Headquarters' Federation & Chapter Services section on Form F-7 (Figure 1), by mail or online no less than annually, by January 1;
- ❖ Reports chapter dues to National Headquarters' Federation & Chapter Services section by January 1 of each year. (Note: Headquarters needs at least 90 days' advance notice for dues changes.);

- ❖ Maintains a list and file for each committee;
- ❖ Prepares the chapter's general correspondence (other than correspondence that is not a particular function of another officer);
- ❖ Orders necessary supplies and forms for the chapter with Requisition for Printed Supplies Form (F-18) online or by mail;
- ❖ Maintains a file for *NARFE Insider* and *Recruitment and Retention Journal*; and
- ❖ Reports member changes of address and deaths to National Headquarters using the OAM member roster online, or mailed forms. (In some chapters, this is done by the membership chair.)

Treasurer (or Secretary/Treasurer)

- ❖ Creates a budget for approval by the chapter membership;
- ❖ Disburses funds as directed by the president, executive committee or bylaws;
- ❖ Obtains IRS federal income tax exemption letter from the National Secretary/Treasurer (Communications/Mailing Permit);
- ❖ Forwards to National Headquarters all national dues paid to the chapter and notifies National Headquarters (Attn: Member Services) of all chapter dues paid by members. To update member records, Forms F-16 and F-16R Transmittal Sheets are available to send dues to National Headquarters. (The instructions should be followed exactly);
- ❖ On the rare occasion that a member's dues renewal check is cashed, send a check for the national dues only to National Headquarters (Attn: Member Services) and indicate that the chapter has retained its dues.
- ❖ Receives chapter dues, which are reimbursed to the chapter by the following month for the prior month's chapter dues;
- ❖ Deposits funds in a federally-insured financial institution and maintains an accurate, current account of all money collected and disbursed;
- ❖ In collaboration with the President, files ePostcard 990N Form annually no later than May 15 on the IRS website;
- ❖ Reports chapter finances at each regular meeting. (May use Form F-38, see Appendix E. No copy is required at NARFE National Headquarters.);
- ❖ Reconciles, at regular intervals, membership records and chapter dues (received from the National Secretary/Treasurer) with the chapter secretary and the membership chair or other officer assigned membership duties;



Figure 2: Exempt Organizations Select Check (990-N filer information)

- ❖ Disburses special/dedicated funds such as Alzheimer’s, and the NARFE-FEEA Fund as soon as possible after collection;
- ❖ Records the receipt of all funds and ensures that checks made payable to the chapter, but meant for the funds, are correctly entered into the appropriate bank account (if separate accounts are maintained, otherwise, provide a separate report of the receipts and disbursements with the Treasurer’s report; and
- ❖ Separately accounts for disbursements of all funds—regardless of their source or purpose—collected in the name of the chapter or federation;
- ❖ Processes a check on the chapter account in an identical amount that is payable to the entity for whom the funds are intended and forwards to that entity, along with any contributors’ checks made directly payable to that organization. (Form F-38 is available to report this fund activity on the “Miscellaneous [itemized]” lines under both the “Receipts” and “Disbursements” sections of the form, ensuring that there are no carry-over balances in these accounts.)

Form F-38, Treasurer’s Monthly Report (Appendix E) is available from National Headquarters’ supply office upon request. (Use Form F-18, Requisition for Printed Supplies.)

OTHER LOCAL CHAPTER OFFICERS (Primarily appointed and may only have a chair)

The officers listed below are not required, but may be considered necessary when expanding activities of the chapter.

Membership Chair (Who may also serve as a chapter vice president)

Responsible for membership recruitment, retention and reinstatement. A key resource for the Membership Chair is the “Membership Marketing Manual,” Form FH-19, available from NARFE Headquarters or the website. This individual should be familiar with the Membership Application Form F-135 and the criteria for joining.

- ❖ Create, implement, monitor, document and manage membership development plans and materials for the chapter to recruit and retain members, and encourage former members to rejoin;
- ❖ Increase public awareness of NARFE by exhibiting at local events where active and retired federal workers may be in attendance;
- ❖ Work with chapter officers and committee chairs to ensure chapter activities and programs are informative and varied to include programs of interest to all members;
- ❖ Engage chapter members in recruitment plans and foster greater involvement; and
- ❖ Forward names and addresses of prospective members to the NARFE Recruitment and Retention Section.

Legislative Chair (Who may also serve as a chapter officer)

Serves as the liaison between chapter members, Congressional District Leaders (CDLs), federation leaders and NARFE’s Advocacy Department, providing timely updates on NARFE’s legislative priorities, motivating them and coordinating effective grassroots action at the chapter level.

- ❖ Provides legislative updates to NARFE members at chapter meetings and through newsletters;
- ❖ Communicates with CDLs about ongoing engagements with legislators and staff;
- ❖ Works with CDLs to build relationships with members of Congress and their staffs;
- ❖ Keeps up to date on legislation affecting Feds;
- ❖ Keeps up to date on and participates in NARFE grassroots activities;
- ❖ Is familiar with NARFE's Legislative Program and positions on pending legislation;
- ❖ Plans grassroots activities along with CDLs in which NARFE members can participate; and,
- ❖ Works with CDLs, Federation Legislative Chair and fellow legislative officers in the district to plan joint events and invite chapter members to participate.

NARFE-PAC Chair

Leads chapter efforts to promote NARFE-PAC, the Association's political action committee, such as:

- ❖ Educating chapter members on the importance of NARFE-PAC;
- ❖ Encouraging and soliciting members' contributions;
- ❖ Assisting Federation NARFE-PAC Coordinators in providing state recommendations for contributing NARFE-PAC funds to candidates in their respective district; and,
- ❖ Sharing NARFE-PAC contribution and disbursement information with chapter members.

Public Relations Chair (Who may also serve as chapter vice president)

Sets public relations agenda for the chapter. (NARFE's *Public Relations Handbook*, Form FH-9, provides guidance and can be obtained from National Headquarters);

- ❖ Publicizes national and state legislative programs supported by NARFE;
- ❖ Provides the local press, television and radio with factual information concerning NARFE positions on current issues;
- ❖ Ensures that chapter officers are up to date on issues affecting members; and
- ❖ Coordinates with the chapter president visits by elected officials and candidates for public office, and other public relations programs scheduled for chapter meetings.

Note: In some chapters, the public relations officer also serves as editor of the chapter newsletter.

Service Officer (Not an elected officer but appointed)

- ❖ Assists chapter members by providing information, answering questions and offering guidance in navigating issues relating to federal pay and benefits, (*Service Officer Guide*, FH-10, is available from National Headquarters), such as:
 - a. Procedures governing delivery of annuity checks;
 - b. Life insurance and health benefits;
 - c. Survivor benefits;
 - d. Change-of-beneficiary procedures;
 - e. Death benefits;

- f. State and federal income taxes;
- g. Social Security requirements;

- ❖ Assists members to prepare documents associated with the above topics. Provide the F-100, *Be Prepared for Life's Events* (Figure 3), to assist members in managing their affairs; and
- ❖ Keeps up to date by reading benefits-related articles in *NARFE Magazine* (Figure 4) and *NARFE Insider*.

Alzheimer's Chair

- ❖ Receive monthly contributions from chapter members and/or chapter fundraising events. As a Special/Dedicated fund, contributions cannot be mixed with dues income. If funds are maintained in the same account, they must be recorded on the monthly report and designated as Alzheimer's Fund. All donations should be forwarded to the Federation Coordinator at least monthly, if amount is significant, and include the chapter number. See Form FH-12 for details on the program.
- ❖ Encourage chapter members to help set the chapter fundraising goal.
- ❖ Support and participate in federation and national fundraising efforts.
- ❖ Give a brief report on any new Alzheimer's news releases.
- ❖ Plan to have an Alzheimer's speaker/program for your November chapter meeting for Alzheimer's Month. Consider planning a quick and fun fundraiser for the same month.
- ❖ Write an article for your chapter newsletter. List the chapter goal and where you are in reaching that goal.
- ❖ Encourage member participation in planning and conducting fundraising events to be held throughout the year (raffles, 50-50's, etc.).
- ❖ Cooperate with the chapter public relations officer in attracting media attention to the chapter's Alzheimer's fundraising and volunteering efforts.
- ❖ Stress to the membership the importance of making their Alzheimer's contributions through their chapter to make it a win-win situation for all involved!

Chaplain

- ❖ Provides messages and counseling when necessary and during appropriate occasions.

Parliamentarian

- ❖ Should be familiar with *Robert's Rules of Order Newly Revised*;
- ❖ Assists the chair in following correct procedures for conducting meetings, and advises the chair on points of order and questions before the chair; and
- ❖ Advises the chair of proceedings that may adversely affect the substantive rights of any member, or otherwise do harm.



Figure 3: F-100
Be Prepared for Life Events



Figure 4: *NARFE Magazine*

Historian

- ❖ Prepares and maintains an account of significant chapter activities during term of office (includes selected items from the minutes and all other substantial events);
- ❖ Combines the approved historical account with previous accounts, and passes the accumulated history to his/her successor or the chapter president; and
- ❖ Upon the expiration of his/her term of office, updated chapter activities are submitted for approval as part of the chapter's official history.

RECORDS MANAGEMENT

Chapters should maintain active current files as well as archived files in accordance with chapter bylaws. Records should be well-organized and kept for a specified period of time and purged periodically. (See Appendix B, Records Management and Quick Reference Chart.)

ELECTION OF CHAPTER OFFICERS

Elections must be conducted in accordance with the chapter bylaws. If there is a nominating committee, it must submit recommendations at the meeting set by the bylaws or by the president, if there is no such provision. Note: The presiding officer must always provide ample opportunity for additional nominations from the floor when voting is done in person.

Installation of Officers

We suggest that the person conducting the installation of chapter officers be a federation, area/district or other officer, the outgoing chapter president or the immediate past chapter president. If a national officer or regional vice president is in attendance, then either can perform the installation. See Appendix F, Installation of Officers Ceremony. The person doing the installation will read the pledge and then ask the officers to say "I do." The installation pledge is also included on the inside back cover of the printed national bylaws.

NEW CHAPTER OFFICERS

It is recommended that chapter elections be conducted at the same time of year throughout the Association. For example, it should specify in the chapter bylaws that those officers who are installed in December would serve from January 1 through the end of the one-, two- or three-year term of office. The exception to this recommendation is for chapter officers who serve the same year—fiscal or calendar—as federation officers.

After elections, outgoing officers should provide all pertinent information to their successors with information pertaining to the duties and functions of their respective offices. At the end of a term of office, all official files, materials and supplies pertinent to an outgoing officer's function should be promptly transferred to his/her successor.

New officers should be installed with an appropriate ceremony and in accordance with the bylaws. Shortly after assuming office, the new executive committee appointed by the new president and all elected officers should meet to discuss and determine the chapter's plan of action for the coming year.

CHAPTER COMMITTEES

Nominating

Appointed, or elected, as the bylaws provide, a nominating committee should be established and begin to function well before the date set for elections, in order to provide sufficient time to identify willing candidates. At the designated meeting, the committee submits nominations for each elective office.

Executive

This committee generally consists of the elected officers and appointed committee chairs. To provide continuity, it also may include the immediate past president. It should establish routine meeting times in order to develop programs and to agree on those issues to be presented before the membership for consideration. The executive committee is responsible for developing the chapter's plan of action and supporting activities.

Membership

This committee is responsible for developing a strategic plan for the prospecting and recruitment of eligible candidates for NARFE membership and the retention of current members.

A membership plan should include goals and objectives with desired outcomes, volunteers needed for successful implementation, funds required for inclusion in the budget and a tracking system for measuring results. A well-designed membership strategic plan is key and may provide the cornerstone for growing a chapter, and keeping it active and viable in pursuing NARFE's mission. The agreed-upon plan should be brought before the chapter membership for approval.

The federation membership chair can offer assistance when necessary.

Note: If a public relations committee is not appointed, the membership committee can be responsible for publicizing NARFE as well as NARFE-related chapter activities. Members of the Membership Committee should assist with outreach activities at community events.

Legislative Advocacy

This committee is responsible for leading the grassroots advocacy efforts within a chapter. Its mission is to keep chapter members informed and updated on local, state and national legislation that may affect the federal community. Congressional District Leaders (CDLs) should work with the committee to inform chapter members about their legislators' efforts on behalf of the federal community and plan engagements with the legislators and NARFE members living within the applicable congressional district.

The committee should coordinate efforts with the federation and NARFE's Advocacy Department in order to: 1) influence and expedite favorable legislation and regulations; and 2) oppose and defeat unfavorable legislation and regulations. The committee should report to chapter members, federation officers and national officers on favorable or unfavorable progress or developments as they occur.

Public Relations

This committee is usually chaired by the chapter's public relations officer. Guidance for this committee is provided in the FH-9, *Public Relations Handbook*, available from National Headquarters.

Program

This committee plans and provides suggestions and recommendations to the members for a speaker or program to be featured periodically at chapter meetings. **Suggestions:** Presentations by an elected government official or candidate; a medical or health practitioner; a financial or insurance industry expert; an attorney to discuss wills, taxes, trusts, powers of attorney, etc; a local historian; travel films from the public library; or entertainment from a local theater or musical group.

In inviting politicians to speak, chapters must remember that NARFE is a political, but nonpartisan organization. Incumbent elected officials may be invited to speak without regard to political party affiliation, but should be instructed to speak only on the current issues, not as candidates.

If, during an election campaign, a nonincumbent candidate is invited to speak, then all other candidates for the same office should be invited to speak. During election campaigns, debates among candidates are good ways to stimulate member interest and attendance.

Sunshine (Health and Happiness)

This committee maintains contact with chapter members who are celebrating birthdays, anniversaries, achievements, etc. It also maintains contact with those members who are ill or otherwise confined and coordinates with the service officer on issues affecting a member or the member's family.

Social

This committee schedules and oversees special events, such as picnics, special dinners, happy hours, fellowship circles or other group activities.

Member Communications

This committee contacts members to notify them about regular and/or special meetings; provides updates on legislative developments; offers reminders about renewing memberships; and responds to other needs. The chair should inform the sunshine committee of any member's illness or other issues discovered during contact.

Audit

This committee should ensure that a chapter fiscal-year audit is performed annually of the treasurer's records and chapter funds. Its report should go to the president and executive committee and be brought before the members. If an audit reflects any discrepancy, the executive committee should determine the cause and direct corrections. A copy of the audit report should be forwarded to the federation and RVP.

Ways and Means

This committee initiates programs to raise funds for: 1) delegates' expenses for federation and national conferences; 2) social functions; and 3) other chapter projects.

ORGANIZING A NEW CHAPTER

A minimum of five NARFE members or eligible members – in cooperation with the federation president – may apply to form a new chapter. Nonmembers who wish to be charter members must join NARFE no later than the date of the charter application. While the minimum is five, every effort should be made to recruit a higher number of charter members.

The group wishing to file for a charter must apply through the federation president. The federation president will consult with the federation executive committee whether or not forming a new chapter in the area would be beneficial to the members and NARFE's mission and vision for the future. The federation president will determine which ZIP codes will be assigned to the new chapter.

If it is determined that the creation of a new chapter would be beneficial, a meeting should be arranged by the federation president with the respective federation area/district officer or other representative to assist the new chapter. A new-chapter kit may be ordered from Federation & Chapter Services at National Headquarters by calling 703-838-7760 or emailing fedchpsrvcs@narfe.org.

The federation representative should assist: a) in contacting prospective members among known federal active and retired employees, NARFE members and their spouses; and b) set a date, time and place for an initial meeting to elect officers and to assist in completing and submitting chapter charter application forms.

Essential officers for a chapter are: president, secretary and treasurer, or secretary/treasurer if a combined office is preferred or necessary. Subsequent formal elections should be held in accordance with the approved bylaws.

The federation representative should assist the secretary or secretary/treasurer in collecting dues, both national and chapter, and in remitting all national and chapter dues to National Headquarters with form F-16 or form F-16R.

On receipt of the initial organization papers, Federation & Chapter Services will assign a chapter number to the new entity. Before a charter can be issued, however, the chapter must have furnished to Federation & Chapter Services:

1. A Charter Application, form F-19, listing the charter applicants and the ZIP codes authorized by the federation president (see Appendix C);
2. A form F-7 roster with each officer's name, address, email address and telephone number. It also must include a meeting place and time, and annual dues amount;

3. Transmittal sheet (forms F-16 and F-16R) with all membership applications and renewals, and checks for all national and chapter dues;* and
4. A chapter bylaws form F-21, signed and dated by the chapter secretary for final approval at National Headquarters.

Note: Questions relating to ZIP code assignments and chapter's Logistical Support Area (LSA) should be sent to National Headquarters' Federation & Chapter Services section. Assignment of ZIP codes to a chapter's LSA is the responsibility of the federation president.

PROCEDURES FOR CLOSING A LOCAL CHAPTER

Federation officials are expected to work with all chapters within their jurisdiction to ensure chapters are active and to assist in improving their viability. As NARFE evolves, however, local chapters likely will close. Lack of leadership or the same leaders serving continuously for many years are the most frequent reasons for closure.

Local chapters also are vulnerable to environmental and generational issues. Once it appears that a local chapter is no longer viable and there is an increased risk of losing members, it is imperative that the following actions be taken:

1. Chapter and/or federation officials should discuss and explore all efforts and/or alternatives for re-invigorating a local chapter. (This can be accomplished by holding a meeting or a conference call or via email/text message.) When solutions for saving the chapter no longer appear to be viable, then procedures for closing it should commence.
2. Chapter and/or federation officials should notify chapter members by mail or email of the pending chapter closure and the options available to the members, including: transferring to a designated local chapter, transferring to a chapter of their choice or opting out of chapter membership while maintaining membership in NARFE. Although notification by mail or email is preferable, the procedure for notification must follow current chapter bylaws. All methods of notification should include sufficient time for members to communicate their option.
3. If chapter bylaws require that meetings be held with a quorum of attendees, this information should be included in the notification with the date, time and purpose of the meeting. Once the meeting is called to order, if the number of attendees does not meet the minimum required to vote for the chapter's closing, then a vote should be taken to waive the chapter bylaws only for the purpose of confirming closure of the chapter.
4. At the conclusion of the meeting, or once the deadline for response from members has passed and the final decision for closure has been confirmed, the federation president will ensure that the steps outlined below are taken.

*The charter for a new NARFE chapter should list chapter members and elected officers. Once the charter is received, the following steps should be taken:

- a) Forms F-16 and F-16R with membership applications and renewals and the proper dues, should be sent to Member Records; and
- b) The chapter secretary (secretary/treasurer) should process form SS-4, "Application for Employer Identification Number," furnished with the welcoming letter.

The closing chapter's officials are responsible for following the procedures listed below to officially close a chapter. If the chapter officials are unable to complete the process for closing, then federation officials must complete the process:

Member and Chapter Notification

- ❖ Members residing outside the chapter's ZIP code may be transferred to the chapter nearest to where they reside, to the chapter of their choice or they may choose to opt out of chapter membership.
- ❖ All members being transferred (both automatically or by choice) must be notified of (a) the name and number of their new chapter; and (b) the name, phone number and email address, if available, of the new chapter's president. If the member has chosen to opt out of chapter membership, the member must be notified to confirm this action and that they have lost their chapter membership.

They become National Only members in the federation of the state where they reside.

- ❖ Receiving chapters must be given a list of transferred members (including street address, phone number and email address). The new chapter's leadership should contact the transferred members to welcome them to the chapter and invite them to participate, if they so desire.

Closing Financial Records

- ❖ All outstanding financial obligations must be met prior to official closing.
- ❖ Any funds remaining after the chapter has met all outstanding financial obligations should be forwarded on a pro rata basis to the receiving chapter(s), the Federation for those becoming national only members, and/or National Headquarters. (Sufficient funds to cover per capita rates, if applicable, is required.)
- ❖ If there are funds remaining after the above transactions have taken place, they must be forwarded to National Headquarters to be held in escrow. Chapter bank account(s) must be closed.
- ❖ If the closing chapter is incorporated within its state, the Secretary of State must be notified of the closing once all funds have been appropriately distributed.
- ❖ The Internal Revenue Service must be notified of the chapter closing by completing ePostcard 990-N, which chapters are required to submit annually.

Federation President Follow-Up:

- ❖ The federation president must submit a report confirming closure of the chapter to Federation & Chapter Services at NARFE National Headquarters, along with a list of members and the chapter(s) to which they are being transferred. Additionally, the federation president must notify the respective regional vice president of the closing.
- ❖ The federation must reassign the closing chapter's ZIP codes to other chapter(s) and complete the F-46, "LSA Assignments Form," and forward it to National Headquarters.
- ❖ If available, the closed chapter's charter should be returned to National Headquarters.

PROCEDURES FOR CLOSING A CHAPTER NOT AFFILIATED WITH A FEDERATION

There are several chapters throughout the country that have made the decision to operate independently from their respective federations. The federations have no direct oversight responsibility for these chapters, and these chapters are exempt from federation activities. A nonaffiliated chapter may opt to close for the same reasons that a chapter that is affiliated with a federation does. Once an independent chapter has made the decision to close, the chapter leadership should notify the Regional Vice President (RVP) who has jurisdiction over the region in which the chapter is located.

Once the RVP has determined that the chapter is in jeopardy of closing and there is an increased risk of losing members, it is imperative that the following actions be taken:

1. The RVP and chapter leadership should discuss and explore all efforts and/or alternatives for reinvigorating the chapter. (This can be accomplished by holding a meeting or a conference call or via email/text message). When solutions for saving the chapter no longer appear to be viable, then procedures for closing it should commence.
2. The RVP and chapter leadership should notify chapter members by mail or email of the pending chapter closure and the options available to the members to continue their membership, including: transferring to a designated local chapter, a chapter of their choice or opting out of chapter membership while maintaining membership in NARFE as a National Only member. Although notification by mail or email is preferable, the procedure notification must follow current chapter bylaws. All methods of notification should include sufficient time for members to communicate their option.
3. If chapter bylaws require that meetings be held with a quorum of attendees, this information should be included in the notification with the date, time and purpose of the meeting. Once the meeting is called to order, and the number of attendees does not meet the minimum required to vote for the chapter's closing, a vote should be taken to waive the chapter bylaws only for the purpose of confirming closure of the chapter.
4. At the conclusion of the meeting, or once the deadline for response from members has passed and the final decision for closure has been confirmed, the RVP must ensure that the steps outlined below are taken.

If chapter officials are unable to complete the process for officially closing a chapter, the RVP must complete the process.

Member and Chapter Notification (see "Procedure for Closing a Local Chapter," p. 13)

Regional Vice President Follow-Up

- ❖ The RVP must submit a report confirming closure of the chapter to Federation & Chapter Services at NARFE National Headquarters, along with a list of members and the chapter(s) to which they are being transferred. Additionally, the RVP must notify the federation president of the closing.
- ❖ The RVP must reassign the closing chapter's ZIP codes to other chapter(s) and complete the

F-46, “LSA Assignments Form,” and forward to National Headquarters.

- ❖ If available, the closed chapter’s charter should be returned to National Headquarters.

REACTIVATING A CLOSED CHAPTER

To reactivate a closed chapter, the federation president should make the request to the National Headquarter’s Federation & Chapter Services. The original charter may be used, if still available, or it can be reconstructed if supporting records are sufficient. A new charter can be issued, showing current officers and new charter members, using either the old charter number or a new number.

The federation president will determine whether or not any money belonging to the closed chapter is in escrow, and—if so—send it to the treasurer of the reactivated chapter.

Before the reactivated chapter’s charter is issued or reconstructed, the chapter must ensure that the following has been sent to Federation & Chapter Services:

- ❖ A form F-19 Charter Application, listing the ZIP codes assigned by the federation president;
- ❖ A Chapter Officer Roster—form F-7—giving the name, membership number, address, email address and telephone number of each officer and committee chair. Include also the meeting date, time and place, and annual dues amount;
- ❖ A copy of the chapter bylaws, form F-21, signed and dated by the secretary or secretary/treasurer;
- ❖ Transmittal sheets forms (F-16 and F-16R) accompanied by all membership applications and membership renewals, together with the proper dues amount for combined national and chapter dues.

COMMUNICATIONS

Chapter Website

All NARFE Chapters should have and maintain a website. Through the Online Activities Module (OAM), NARFE provides webhosting services and website templates for chapters and federations. Whether you have a simple webpage or create a website with multiple pages, it is critical that the information on your site be current and accurate, so make sure administrative access to the website is shared with the appropriate volunteers.

Please visit www.narfe.org/guide for guidelines and information on NARFE webhosting.

Chapter Newsletter

An editor, and perhaps an assistant editor, should be appointed to publish a periodic chapter newsletter.

A chapter newsletter is one of the most effective means of keeping chapter members informed. It is particularly important to members who are unable to attend meetings regularly, but want to maintain an interest in chapter activities. The newsletter can be distributed by U.S. Postal Service mail service, email (such as the NARFE Email System) or both.

If necessary, the public relations committee chair may be appointed editor. In any event, the newsletter editor should work closely with all officers and committee chairs.

Stationery

Official chapter stationery adds credibility to correspondence. Letterhead designed for chapters is available from National Headquarters (see Form F-18 under “Supplies” “Chapter Letterhead”), or it can be downloaded from the NARFE website’s “Officer Resources” page.

Mailing permit

NARFE is a nonprofit organization. Chapters and federations may obtain a nonprofit mail (bulk mailing) permit for 200 pieces or more, including a newsletter. The IRS letter stating NARFE’s nonprofit status must be presented to the USPS when applying for a permit, and may be obtained from the National Secretary/Treasurer’s office. The local post office can provide the necessary forms and instructions. Ask for postal rules and regulations concerning mailings or classes governing permissible use and how to prepare mail for acceptance. Penalties are severe for using the nonprofit permit for profit-making organizations’ purposes.

NARFE SERVICE CENTER/SERVICE OFFICER SUPPORT

NARFE’s Federal Benefits Institute department is available to provide support to federation and chapter service officers, as well as service officers located within an installation, municipal center, federal building or private facility. Both service officers and service centers provide active and retired federal employees with information to assist with issues relating to: death benefits, Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) retirement benefits, Medicare, Federal Employees’ Group Life Insurance (FEGLI), Federal Employees Health Benefits (FEHB) program and other matters important to annuitants and survivors. All contacts are treated confidentially. (Note: Volunteers at service centers are not authorized to provide pre-retirement counseling, financial or legal advice to current employees or their dependents.)

The Federal Benefits Institute department keeps a current list of active service centers and should be contacted whenever a service center is opened, closed or has moved to a new location. Contact the department at 703-838-7760 or email fedbenefits@narfe.org.

Section III: Federation Officers & Operations

INSTALLATION OF OFFICERS

We suggest that the person conducting the installation of federation officers be a National Officer, the regional vice president (RVP), the outgoing federation president or the immediate past federation president. The installation oath is located in Appendix F.

FEDERATION OFFICER DUTIES

General Responsibilities

- ❖ First and foremost, promote NARFE's mission and vision;
- ❖ Know the National Bylaws (FH-4) and the respective federation bylaws;
- ❖ Participate in federation meetings and conferences/annual meetings, area/district and chapter meetings in accordance with federation bylaws;
- ❖ Serve as liaison to National Headquarters, National Executive Board (NEB) and respective RVP in promoting chapter/federation successes and identifying, analyzing and resolving chapter/federation issues;
- ❖ Oversee the process of chartering new chapters (see page 12), and assist them in becoming effective, viable and strong;
- ❖ Whenever possible, assist in reviving and strengthening faltering or inactive chapters; and
- ❖ Support and implement the policies and programs of the federation and the NEB.

If you are a federation officer with an email address, you must accept NARFE email.


Federation officers' duties listed below are provided for guidance only. Federation bylaws prescribe specific duties and should be followed.

President

- ❖ Acts as the chief executive and director of federation activities and programs that promote the mission of NARFE;
- ❖ Presides at federation conferences/annual meetings and meetings of the federation executive board;
- ❖ Appoints officers and committee chairs who (though they are not required by the bylaws) carry out the functions of the federation;
- ❖ Assigns ZIP codes for each chapter in the federation, using form F-46;
- ❖ May be an authorized signatory on all checks drawn on federation funds, subject to the restrictions set by the executive committee/board or federation bylaws;
- ❖ Ensures that all actions by the respective federation are carried out and all information and updates are forwarded to all chapters;
- ❖ Ensures that all federation reports are promptly completed and forwarded to National

Headquarters and the respective regional vice presidents;

- ❖ In collaboration with the Treasurer, ensures the IRS 990N Form (ePostcard) is filed on the IRS website annually; and
- ❖ Ensures that all required federation reports and information pertaining to the management of a federation, particularly form F-7A (Figure 5), Federation Officer Roster, are forwarded to National Headquarters.



NARFE
FEDERAL BENEFITS EXPERTS

**National Active and Retired
Federal Employees Association**
606 North Washington Street
Alexandria, Virginia 22314-1914
(703) 838-7760 • FAX (703) 838-7783

NARFE Federation Officer Roster

For the state of _____ 20__ to 20__

Federations are encouraged to submit their changes and required annual update to NARFE online. The online system saves time and eliminates errors. This paper form should be used only by federations that do not have computer access for this required reporting.

INSTRUCTIONS:

Note: This may be submitted online at www.narfe.org/oam

- PLEASE READ THIS ENTIRE FORM CAREFULLY BEFORE FILLING IT OUT.**
- Every office is assigned a specific number code entered in the computer database in numerical sequence to speed entry.
Please do **NOT** change or type over titles not used by your federation. Check box next to or below title if the officer listed is a new officer.
- This form may be submitted only by one of the following **federation officers: President, Executive VP, Secretary, Secretary/Treasurer or Membership Chair.**
- This form should be used to report federation officers (elected and appointed) to NARFE Headquarters immediately after:
 - Every federation convention, but no less than annually;
 - In convention years, submit with the convention report (F-22) as soon as possible after the convention;
 - If the F-22 is delayed over two weeks after the convention ends, send this F-7A separately and check here:
 - Every change in any federation office.
- Note: Every federation officer must be: a national member AND a member of a chapter of the federation.

Submit this completed form to:
NARFE, Attn: Federation and Chapter Services,
606 N. Washington St., Alexandria, VA 22314-1914

<p>President 20 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Executive Vice President 21 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>1st Vice President 22 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>2nd Vice President 22A <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>3rd Vice President 22B <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>4th Vice President 22C <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>5th Vice President 22D <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Secretary 23 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p>	<p>Treasurer 24 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Secretary/Treasurer 25 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Legislative Chair (Nat'l Legislation) 26 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Legislative Chair (State Legislation) 28 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Public Relations Officer 29 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Service Officer 31 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p> <p>Membership Chair 33 <input type="radio"/> New <input type="radio"/> No change <input type="radio"/> Vacant Member # _____ Member Last Name _____</p>
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F-7A (01/20) page 1 of 3

Figure 5: F-7A, Federation Officer Roster

Vice President (Includes Executive Vice President and all other VPs)

- ❖ Performs duties assigned by the president and presides over federation meetings in the president's absence;
- ❖ May be elected or appointed as the oversight officer for specific assignments, such as legislation or membership; and

- ❖ Performs presidential functions if the office of the president is vacant, and continues in this role until the vacancy is filled.

Secretary

- ❖ Records minutes of all proceedings and maintains records of the federation executive board and conferences/annual meetings;
- ❖ Maintains federation executive board/committee records and documents;
- ❖ Provides National Headquarters with an up-to-date form F-7A, Federation Officer Roster, whenever changes occur; and
- ❖ Completes form F-22, Federation Convention Report, immediately after a federation convention/annual meeting and promptly sends, with appropriate attachments, to National Headquarters.

Treasurer

- ❖ Receives and manages all federation funds. (If the treasurer does not have the IRS Federal Income Tax Exemption Letter, it can be obtained from the National Secretary/Treasurer);
- ❖ Maintains custody of all financial instruments and files;
- ❖ Keeps accurate, current records of all federation funds received and paid out;
- ❖ Deposits funds in a federally insured financial institution with executive board approval, or as specified in the bylaws;
- ❖ Authorized signatory on all financial accounts (checking accounts, CDs, etc.);
- ❖ Draws checks against federation funds as authorized by the executive board or federation bylaws;
- ❖ In collaboration with the President, files ePostcard 990N Form annually on the IRS website* (see Fig. 2 on page 5);
- ❖ Submits a full financial report at each federation executive board/committee meeting and conference/annual meeting, but no less than annually. (A copy also should be sent to the National Secretary/Treasurer); and
- ❖ Performs other duties as assigned by the president.

Legislative Chair

Serves as the liaison between chapter legislative chairs, federation leadership, CDLs, Senatorial Leaders (SLs), elected officials (where CDLs and SLs are not appointed), and NARFE's Advocacy Department, providing expertise and direction for members, motivating them and coordinating effective grassroots action at the federation level.

- ❖ Provides legislative updates to NARFE members at federation meetings and through newsletters;

* The IRS Form 990-N is filed electronically via the Internet and is required for nonprofit organizations that have annual gross receipts of \$50,000 or less. For instructions on how to file the 990-N, go to <https://www.irs.gov/charities-non-profits/irs-form-990-n-e-postcard-user-guide>.

- ❖ Builds relationships with members of Congress and their staff, in coordination with CDLs/SLs and chapter chairs;
- ❖ Keeps up to date on legislation and participates in NARFE calls to action and advocacy activities;
- ❖ Is familiar with NARFE's Advocacy Program and positions on pending legislation;
- ❖ Prepares and carries out grassroots activities in which NARFE members can participate;
- ❖ Acts as primary point of contact for senators' offices if federation does not have SLs; and
- ❖ Works with CDLs/SLs and Chapter Legislative Chairs to make sure they have the resources necessary to fulfill their responsibilities.

Congressional District Leader/Senatorial Leader

Serves as the liaison between chapter legislative chairs, federation leaders, elected officials and NARFE's Advocacy Department, providing expertise and direction for members, motivating them and coordinating effective grassroots action for a specific congressional district.

- ❖ Keeps current on NARFE top issues and advocacy positions (this requires regular check-ins with the NARFE Advocacy staff);
- ❖ Holds at least one face-to-face meeting annually with his/her congressional office on NARFE's priorities;
- ❖ Works directly with the NARFE Advocacy department in advance of any meeting with congressional offices;
- ❖ Sends thank-you letters after meetings and provides other recognition for support when appropriate;
- ❖ Emails the staff members of the representative or senator periodically on relevant and timely issues to work toward building a strong relationship;
- ❖ Invites representative or senator and his/her staff to speak at federation and chapter meetings annually;
- ❖ Is ready to respond to NARFE Advocacy alerts with telephone calls and/or emails in a timely manner;
- ❖ Reports any significant interactions with the congressional office to the NARFE Advocacy department via the Legislative Action Center;
- ❖ Regularly attends town hall meetings and other community events where the member of Congress and/or his/her staff will be in attendance, and seeks out these opportunities and invites NARFE members to join;
- ❖ Signs up for the legislator's official congressional newsletter and campaign distribution list; and
- ❖ Works with chapter presidents and legislative chairs in the district to coordinate efforts and keeps them apprised of interactions with the legislator's office.

NARFE-PAC Coordinator

Leads federation efforts to promote NARFE-PAC, the Association's political action committee, such as:

- ❖ Educating members on the importance of NARFE-PAC;
- ❖ Encouraging and soliciting members' contributions;
- ❖ Providing state recommendations for contributing NARFE-PAC funds to candidates in their respective state;
- ❖ Sharing contribution and disbursement information with federation leaders; and
- ❖ Coordinating with the Advocacy department and local members to find attendees for in-state congressional fundraisers.

AREA/DISTRICT OFFICER/DIRECTOR

- ❖ Is familiar with the operation of each chapter within its respective area/district;
- ❖ Encourages activities to promote NARFE's mission and chapter successes, and assists in resolving issues/problems;
- ❖ Consults with other federation officers and the respective regional vice president when necessary;
- ❖ Assists inactive chapters in becoming active, organizes new chapters, and recruits new members (National Headquarters will provide appropriate guidance when necessary);
- ❖ Periodically visits each chapter in the area/district to assess the current status; and
- ❖ Organizes and chairs periodic meetings of chapter officers for training and discussing successes, issues and problems.

Note: The federation executive board should define the boundaries of each area/district, based on population, and legislative and geographic areas and volunteers to staff the position.

NARFE Alzheimer's Federation Coordinator

- ❖ Acts as a resource person and offers assistance to the new chapter coordinators as they begin their new terms; ensures they are in possession of a Chapter Coordinator's Manual;
- ❖ Works with federation executive board and chapter coordinators to set annual goals for fundraising;
- ❖ Receives contributions from chapters;
- ❖ Once a month, sends total contributions to the Alzheimer's Association in the salmon-colored, pre-addressed envelopes provided by the Alzheimer's Association;
- ❖ Reconciles with Monthly PGA Report from the Alzheimer's Association;
- ❖ Sets up Alzheimer's display table at federation convention with brochures ordered through NARFE Headquarters and the Alzheimer's Association;
- ❖ Request materials from the Alzheimer's Association (Contact: Alan Flores at 312-335-5828 or email aflores@alz.org. Order your supplies at least four weeks prior to your federation conference/annual meeting.);
- ❖ At federation conference/annual meeting, reports on research and money contributed during the past year;
- ❖ Conducts workshop for chapter coordinators at federation conference/annual meeting;

- ❖ Makes suggestions to chapter coordinators for raising money;
- ❖ Supports the Alzheimer's fundraiser at the National Conference;
- ❖ Present "Certificates of Appreciation," signed by the NARFE-Alzheimer's National Committee Chair and the NARFE National President, during federation conference/annual meeting. (National certificates are obtained from your regional member of the National Committee); and
- ❖ Handles Memorial Contributions: The Federation Coordinator has the responsibility to 1) advise a family when a memorial donation has been made to NARFE-Alzheimer's Research and 2) send a NARFE thank-you card to the donor of a memorial contribution.

Section IV: Other Information

NATIONAL CONFERENCES

Time and Place

NARFE's National Conferences are held biennially in even-numbered years. The NEB selects the sites for National Conferences.

Proposed Bylaw/Standing Rule Amendments

The 2018 NARFE Bylaws (FH-4) published in October 2018 stated that a chapter, a federation executive board, a federation conference/annual meeting, the NEB, any committee designated by the NEB, or a group of twenty members in good standing may submit proposed amendments to the NARFE bylaws. Amendments to any standing rule require submission of the same form and will be processed in the same manner as bylaws amendments.

AWARDS

Awards are presented in recognition of significant or outstanding performance by members. It is very important to recognize the outstanding contributions of our members and to reward them accordingly. Award standards are established by individual chapters and federations. Recognizing members for top performance can be done in a number of ways, from a heartfelt "thank you" to a plaque. To assist chapters and federations in their awards programs, NARFE has two kinds of certificates—one for a member and another for an organization, as indicated below. An official desiring to use the "Citation for Distinguished Service" should ensure that the criteria prescribed have been met. NARFE does not provide certificates for certain types of recognition such as wedding anniversaries or birthdays.

Citations for Distinguished Service

Distinguished service certificates, bearing an embossed NARFE seal and red accent ribbon, may be requested from Federation & Chapter Services, at no cost, in five signature types: 1) Chapter President, 2) Federation President, 3) Regional Vice President, 4) National President or 5) Regional Vice President and National President.

Blank certificates for (1), (2) and (3) are available upon request. Simple certificates are on the NARFE website.

Specific language requested for certificates for (1), (2) and (3) should have an appropriate regionwide, federation-wide or chapter-wide significance.

Certificates requested for (4) and (5) must be accompanied by written justification of the service to be recognized and must be of significant value to a national program.

OBTAINING A NARFE BANNER

The standard NARFE banner measures 36 inches wide by 50 inches high. The banner is white, with the new NARFE logo at the top. The chapter name and number appear under the logo in red text.

For a price quote, call the National Capital Flag Co., Inc. at 800-368-3524 (Washington, DC, area: 703-751-2411).

Make the check payable to National Capital Flag Co., Inc., and send the order to:

National Capital Flag Co., Inc.
100 South Quaker Lane
Alexandria, VA 22314

Banners are shipped directly to the chapter from the manufacturer. If you have any questions or issues, you can write to the address on the previous page, call 800-368-3524 (Washington, DC, area, 703-751-2411), or send an email message to flags@nationalcapitalflag.com. You can visit the manufacturer's website at www.nationalcapitalflag.com.

CHARITABLE CONTRIBUTIONS

The use of membership dues to make donations to charitable organizations is **NOT ALLOWED**.

NARFE has always encouraged chapters to become involved in local community activities. One way to accomplish this is through making donations to charitable organizations by individual members using their own funds. Also, a significant number of chapter members make tax-deductible donations to the NARFE-Alzheimer's Research Fund and the NARFE-FEEA Funds. Contributing to these funds, whether they are associated with NARFE directly or not, is strictly voluntary. Moreover, these activities are not directly related to NARFE's mission.

All funds collected—except for NARFE-PAC—whether through the national dues-collection system, fundraising activities or other methods, must go through the chapter treasury. When collected, these funds become dedicated funds and must be used for the purpose intended or collected. Funds collected for different reasons other than those listed above **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 (natsectreas@narfe.org).

Appendices

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 (See *Membership Marketing Manual, FH-19*)

- 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, Appendix D.
- 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 nationally approved purposes. **Member dues shall not be used for charitable contributions** except those approved by the NEB.

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.

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. Conference participation

- Discuss issues at chapter meetings that pertain to NARFE's mission and, if considered appropriate, draft resolutions for consideration.
- Provide funding, if available, for delegates to attend federation and national conferences.

APPENDIX B - RECORDS MANAGEMENT

Quick Reference Chart

Record keeping is important to the overall management of chapters and federations. Good management decisions depend on well-organized and complete record keeping. As leadership changes, providing sufficient records is critical for a smooth transition. Records should be kept for a specified time period, and periodic purging is recommended. Having in place a procedure for the proper storage of records is recommended.

This chart is a guide for current practices and includes standards that are accepted by NARFE. Records can be divided into three categories – One-Year Files, Three-Year Files and Permanent Records.

Records Management Schedule, Quick Reference Chart

	File Type	Maintenance Period	Comments
Permanent Records	<ul style="list-style-type: none"> ◆ EIN – Employer Identification Number ◆ Minutes and Committee Reports ◆ Organizational background papers (charter, constitution & bylaws, officers rosters) ◆ Photographs, newsletters, news clippings, audio/visual cassettes for historical purposes (or archives) ◆ Property Records (accountable property) audit reports, budgets and journals ◆ Record of chapter property (flag, banner, gavel, postal permit, etc.) ◆ Directory of Chapters* ◆ Equipment Inventory** 	Permanent *Until superseded ** As long as equipment is retained	
Three-Year Files	Financial Records: <ul style="list-style-type: none"> ◆ Bank Statements (investment accounts, money funds accounts, Treasury Bills, CDs, etc. ◆ Checkbooks, cancelled checks and bank reconciliations ◆ Daily cash receipts and bank deposits ◆ Invoices, reports, vouchers ◆ Per Capita report file ◆ Receipts and Disbursements Ledger 	Three years preceding the current fiscal/calendar year	IRS form 990, Organization Exempt from Income Tax. "Usually records that support an item of income, deduction or credit must be kept for three (3) years from the date the return is due or filed, whichever is later. Keep records that verify the organization's basis in property for as long as they are needed to determine the basis of the original or replacement property. The organization should also keep copies of any returns it has filed. They help in preparing future returns and in filing amended returns.
One-Year Files	General correspondence	Previous year and current fiscal/calendar year	Correspondence should be destroyed unless it contains historical information.
Committee Records	File folders	Two years, then screened for disposal or nonessential material prior to turning over to the incoming chairman	File folder labels should indicate: <ul style="list-style-type: none"> ◆ Subject ◆ Calendar/fiscal year ◆ Disposition instructions (one year, three years or permanent) Normally, the contents of a file folder should not exceed 1 1/2 inches.

APPENDIX C – F-19, NARFE CHAPTER CHARTER APPLICATION



**National Active and Retired
Federal Employees Association**
606 North Washington Street
Alexandria, Virginia 22314-1914
(703) 838-7760 • FAX (703) 838-7783

NARFE Chapter Charter Application

The federal employees or civil annuitants and/or spouses listed below agree to form a NARFE Chapter and hereby apply for a charter. The chapter's principal location is _____

The chapter's logistic support area (LSA), in which the chapter may recruit, consists of these ZIP codes, as approved by the federation president or authorized representative: _____

_____ Secretary _____ Date

NOTE: All applicants must be NARFE members or, for nonmembers, their membership applications and dues payments must be attached.

Name	Address	City	State	ZIP
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
8.	_____	_____	_____	_____
9.	_____	_____	_____	_____
10.	_____	_____	_____	_____
11.	_____	_____	_____	_____
12.	_____	_____	_____	_____
13.	_____	_____	_____	_____
14.	_____	_____	_____	_____
15.	_____	_____	_____	_____

APPENDIX D – F-131, AUDIT CHECKLIST



National Active and Retired
Federal Employees Association
606 North Washington Street
Alexandria, Virginia 22314-1914
(703) 838-7760 • FAX (703) 838-7783

Checklist for the Audit of NARFE Chapter Funds

General Information

1. Name and number of chapter: _____
2. Name of bank or credit union where account is kept: _____
Is this institution federally insured? Yes No If not, account should be moved to a federally insured institution, preferably in an interest-bearing account.
3. Name of account: _____
4. Identity of account (Number): _____
5. Names of individuals authorized to sign checks on the account:
Two individuals should be authorized as a minimum.
1. _____ 2. _____
3. _____ 4. _____
6. Do checks need to be countersigned? Yes No
If yes, names of individuals authorized to countersign checks:
1. _____
2. _____

Note: Answers to questions 4, 5 and 6 above should be obtained from the bank or credit union where the funds are kept.

Income

1. Are all chapter funds received promptly deposited in bank or credit union accounts? Yes No
2. Chapter dues are received from National with a listing of the dues. Yes No
3. Other funds, such as kitty collections and other donations, should be promptly recorded and deposited into the account. Yes No

Disbursements

1. Are funds disbursed as authorized by the chapter president or other officers as specified in the chapter's bylaws and policies? Yes No. If not, what action was taken to obtain authorization for the disbursement: *Please annotate on reverse side.*
2. Do dispersed checks match receipts/vouchers: Yes No
3. Have per capita dues been remitted promptly to the federation treasurer. Yes No.
If not, what action should be taken by the chapter to ensure this is done: *Please annotate on reverse side.*

Other Items

- A. Are accurate records kept of all chapter income and expenses? Yes No
- B. Is a financial report prepared and presented to the chapter each month? Yes No
- C. Are the financial records and bank statements reconciled each month? Yes No
- D. Are the NARFE-PAC funds kept separate from chapter funds? Yes No

This review of chapter records was accomplished by:

Member: _____ Date: _____

Member: _____ Date: _____

Note: Audits may be performed by any two members of the chapter, with the exception of the president, vice president, secretary/treasurer or treasurer, who should provide all necessary records and any assistance required to conduct the audit.

APPENDIX E - THE F-38 TREASURER'S MONTHLY REPORT



Chapter Treasurer's Monthly Report

	CHAPTER NUMBER	LOCATION	PERIOD ENDING
Receipts*			Balance on Hand - Last Report \$ _____
	Savings (Long term)		\$ _____
	Total dues collected		\$ _____
	Monies received from Ways and Means committee activities		\$ _____
	For special projects such as programs ads, etc. (itemize)		\$ _____
	Birthday and anniversary fund		\$ _____
	Miscellaneous (itemize)		\$ _____
			Total Receipts \$ _____
		Total to be accounted for \$ _____	
Disbursements*			
	To National Office for dues collected		\$ _____
	To Federation Treasurer for dues		\$ _____
	Office/Officer expenses (itemize)		\$ _____
	Other office expenses		\$ _____
	Disbursements of special collections		\$ _____
	Chapter newsletter/bulletin printing and copying expenses		\$ _____
	Miscellaneous (itemize)		\$ _____
		Total Disbursements \$ _____	
		Total to be accounted for \$ _____	
Obligations*			
	Dues to be remitted to National		\$ _____
	Federation dues to be remitted		\$ _____
	Second year members		\$ _____
	Third year members		\$ _____
	Other obligations (itemize)		\$ _____
	Estimated routine expenses next month		\$ _____
		Total Obligations \$ _____	
		Balance on hand for use \$ _____	

Signed _____ **Date** _____
 Treasurer

F-38 (01/20) *May not have entries under combined dues collection. Use reverse side for itemizing entries above.

APPENDIX F – INSTALLATION OF OFFICERS CEREMONY

Presiding Officer: Please raise your right hand.

I hereby pledge to effectively perform the duties of my office; carry out the programs, policies and bylaws of the Association; promote its goals and objectives; and work as a team in harmony with the Association's leadership.

I will safeguard all of the Association's property under my care; have such property available for official inspection, if required; and pass on said property intact to my successor.

Please say "I do."

I hereby declare you duly installed officers of the _____
_____ Chapter/Federation. You will now assume the duties of your office as prescribed by the bylaws.

If available, the newly elected officers should be presented with the appropriate pin, and the outgoing president should be presented with a past president's pin.

APPENDIX G – CHART OF NARFE POSITION CODES AND OAM ACCESS

This section documents NARFE Position Codes and access in the Online Activities Module (OAM). For information on the OAM, see Appendix J.

To access the OAM, officers must have a valid email address in their NARFE membership record. If a chapter or federation does not have any officers in these positions who have access to a computer, they can simply assign an officer who has access to a computer to one of these positions in order to create an account for the chapter or federation.

Officers from chapters and federations can access this module to perform tasks as follows:

- Maintain an up-to-date chapter and federation officer roster (F-7, F-7A)
 - Retrieve membership data with specific membership criteria
 - Save data to better manage chapter and federation membership
 - Communicate through direct email with individual members and prospects.
- ❖ **CHAPTER LEVEL** includes: “F-7 Update,” “Officer Roster,” “Activity Reports,” “Member Roster,” “NARFE Email System (NES),” and optional “NARFE Web Hosting” for that person’s chapter only.
- ❖ **FEDERATION LEVEL** includes: “F-7A Update,” “Officer Roster,” “Activity Reports,” “Member Roster,” “NARFE Email System (NES),” and optional “NARFE Web Hosting” for all chapters in the federation, and chapter-level access to officer roster, member roster and activity reports.

Currently there are three **MODES OF ACCESS**:

Full mode allows changing any F-7 (chapter) or F-7A (federation) position assignments, dues, etc. Only a very limited number of people in each organization have the need to change the F-7 or F-7A assignments.

ONLY FULL mode allows access to the corresponding Officer Roster, Activity Reports and Member Roster, including easy downloading of data into Microsoft Excel, text, or printing. Member data downloaded to Excel has the expiration date as a true date.

DOWNLOAD mode allows access to and ability to save the corresponding Officer Roster, Activity Reports and Member Roster, including easy downloading of data into Microsoft Excel, text, or printing.

READ ONLY mode allows the Activity Reports, Officer Roster and Member Roster to be viewed or printed, but there is no easy way to download the data into Excel or as text, and the expiration date field includes letters such as “AN” or “*LIFE,” which interfere with Excel features such as filtering on date.

The NARFE Information Services Department is working with the NARFE Configuration Advisory Board (CAB) to further advance NARFE in technology as an increasing number of members and officers use technology in their daily routine. CAB is made up of 10 members, one from each

region, who represent chapters and federations. NARFE members and officers are urged to contact their regional CAB representative to voice their opinions or offer suggestions for improving online data services. Go to www.narfe.org/cab/member/index.cfm to contact a CAB member.

Chart of NARFE Position Codes and OAM Access

Position Code	Description	OAM F-7/F-7A Access	OAM Officer Roster Access	OAM Activity Reports & Member Roster Access	NES Access	Web Hosting Access
1	Chapter President	Full	Full	Full	Full	Full
2	Chapter First Vice President	Full	Full	Full	Full	Full
2A-2C	Chapter Additional Vice Presidents		Read Only	Read Only		
3	Chapter Secretary	Full	Full	Full	Full	Full
4	Chapter Treasurer		Read Only	Read Only		
5	Chapter Secretary/Treasurer	Full	Full	Full	Full	Full
6	Chapter Legislative Chair (National)		Read Only	Read Only	Full	
7	Chapter Membership Chair	Full	Full	Full	Full	Full
7A	Chapter Membership Retention Chair		Read Only	Read Only		
8	Chapter Public Relations Officer/Chair		Read Only	Read Only		
9	Chapter Service Officer		Read Only	Read Only		
10	Chapter Service Communication		Read Only	Read Only		
11	Chapter Editor		Download	Download	Full	Full
12	Chapter Alzheimer Chair		Read Only	Read Only		
13	Chapter NARFE-PAC Chair		Read Only	Read Only		
14	Chapter Financial Secretary		Read Only	Read Only		
15	Chapter Other		Read Only	Read Only		
16	Chapter Network Coordinator		Read Only	Read Only		Full
16A	Chapter Network Coordinator/ Social Media Coordinator		Read Only	Read Only		
17	Chapter Legislative Chair (State)		Read Only	Read Only	Full	

Chart of NARFE Position Codes and OAM Access

Position Code	Description	OAM F-7/F-7A Access	OAM Officer Roster Access	OAM Activity Reports & Member Roster Access	NES Access	Web Hosting Access
*20	Federation President	Full	Full	Full	Full	Full
21	Federation Executive Vice President	Full	Full	Full	Full	Full
22A-D	Federation Additional Vice President		Read Only	Read Only		
23	Federation Secretary	Full	Full	Full	Full	Full
24	Federation Treasurer		Read Only	Read Only		
25	Federation Secretary/Treasurer	Full	Full	Full	Full	Full
26	Federation Legislative Chair (National)		Read Only	Read Only	Full	
28	Federation Legislative Chair (State)		Read Only	Read Only	Full	
29	Federation Public Relations Officer/Chair		Read Only	Read Only		
31	Federation Service Officer		Read Only	Read Only		
*33	Federation Membership Chair	Full	Full	Full	Full	Full
33A	Federation Membership Retention Chair		Read Only	Read Only		
34	Federation Editor		Download	Download	Full	Full
35	Federation Alzheimer's Coordinator		Read Only	Read Only		
36	Federation NARFE-PAC Coordinator		Read Only	Read Only		
37	Federation Immediate Past President		Read Only	Read Only		
38	Federation Other		Read Only	Read Only		
41	Federation Network Coordinator		Read Only	Read Only		Full
41A	Federation Network Coordinator 2		Read Only	Read Only		
41B	Federation Social Media Coordinator		Read Only	Read Only		
42	Federation FEEA Coordinator		Read Only	Read Only		
*43	Federation Area/District Officer		Read Only	Read Only		
*43A-S	Federation Area/District Officer 1-19		Read Only	Read Only		

*Full access to National member roster, National email system and National website management

APPENDIX H – OFFICER RESOURCES ON THE NARFE WEBSITE

The NARFE website offers many resources to officers that can save time and expense and reduce errors. Log in to www.narfe.org (“Secure Login” is preferred), then click the “Officer Resources” button. The “OAM Home Page” offers data services and reports for your chapter or federation, and resources such as forms and guides on demand, newsletters, and access to helpful tools, tips and templates.

Data Services and Reports

Access is determined by your assigned position on your chapter or federation’s officer roster (Appendix I).

Data Services use your organization data to communicate with your members. These include:

- Web hosting, an easy-to-use, professional-looking, NARFE-branded and supported website service that includes support for pictures and files such as newsletters;
- NARFE E-mail System (NES), which uses your organization roster email addresses to communicate with your members. This easy-to-use system lets you create message templates and mailing lists to personalize each message with just a few clicks; and
- Other services as needed, such as convention delegate authorization and designation.

Data Reports include the officer roster, member roster, plus activity reports (new members, reinstated, dropped, transfers, deceased, cancellations, prospects, payment status changes, second notices and other information). Two modules are available. **If the same report exists in both, choose the OAM version.**

- **Online Activities Module (OAM)** provides up-to-the minute officer and member rosters and activity reports. You may choose what information is included and the timeframe for activity reports. Special features for key officers include online updating of member contact information, access to member history, death reporting (F-9), and ease-of-use features such as mailing labels with a single click.
- **Online Reports Module (ORM)** The reports include monthly chapter and federation financial reports, and statistical details for federations are created at a specific point in time and stored for each organization to access. Rosters such as the member roster are run quarterly and are usually out of date.

Entry into the OAM provides OAM data reports and data services. The ORM is accessed separately. NARFE Information Technology (IT) is in the process of consolidating all reports and services into the OAM.

The OAM Home Page has a link to documentation modules to learn how to use the OAM.

Resources

Most NARFE forms are available to download or print on demand from the “Forms by Form Number” page. “Requisition for Printed Supplies,” Form F-18, is a directory of the most frequently used forms. If you need paper copies, use the online order form under “Order Forms Supplies.”

Electronic versions are easier to search, take less space to store, and waste fewer resources. Fillable forms let you type the information on your computer, save and then email as needed. Typed information helps reduce errors.

Headquarters Directory, Form H-134, has contact information for NARFE department email addresses and phone numbers.

Newsletters include the *NARFE Insider* and *Recruiting & Retention Journal*.

“Tools, Tips and Templates” includes sample letters, newsletter templates, logos and more.

Configuration Advisory Board (CAB) activity and contact. The CAB is the liaison between field organizations and NARFE Information Technology department for future information reports and functions.



FEDERAL BENEFITS EXPERTS

606 North Washington Street
Alexandria, Virginia 22314-1914

800-456-8410

NARFE.org