

# NARFE Officers Guidebooks & Manuals

Arkansas Federation of NARFE Chapters



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2009

## PREFACE

This directory shows the first page of the various NARFE Officer's Guides. For the latest edition of each of the guides, go to the NARFE National website at <http://www.narfe.org>.

# NARFE Guides/Manuals List

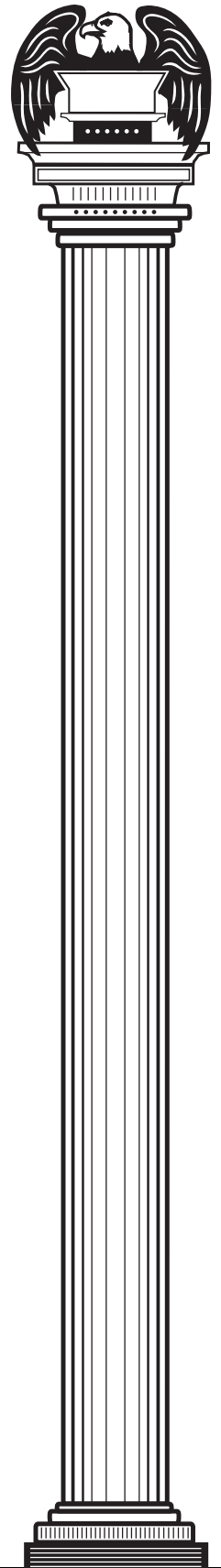
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# Chapter & Federation Officers Manual

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A guide to support and maintain chapter and federation operations.

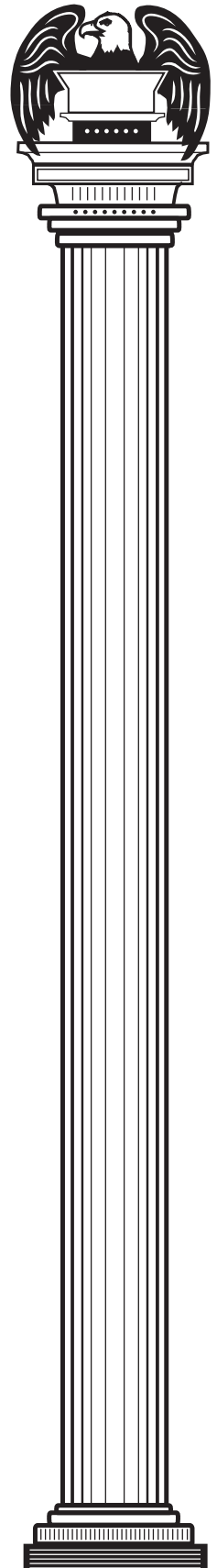


**NARFE**  
PROTECTING YOUR FUTURE

*Since 1921*

# Member Records Manual

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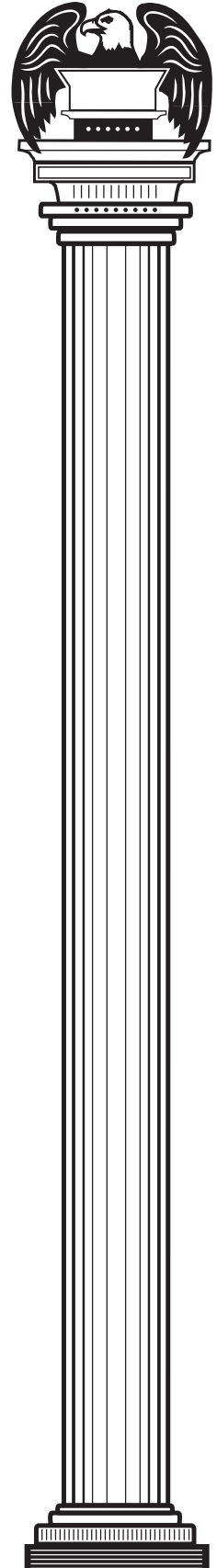
*Since 1921*



# Public Relations Handbook

For NARFE Chapters  
and Federations





# **Service Officer Guide**

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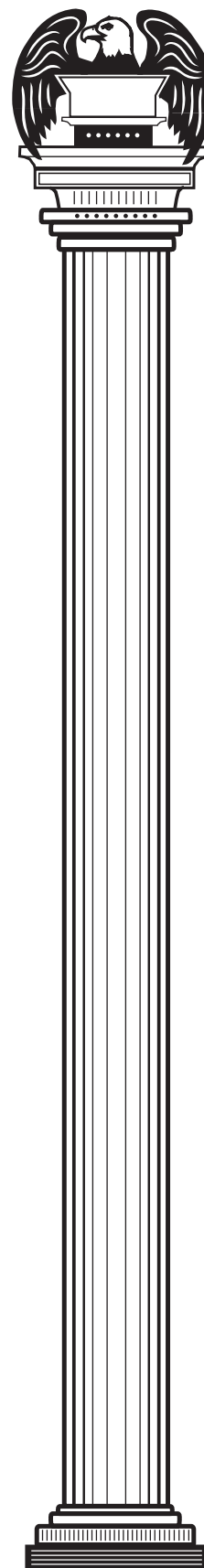
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FH-10 08/09

# Membership Development Manual

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# Chapter President & Vice President

***Duty #1: To support the mission of NARFE.***

## President's Responsibilities

As president of your chapter, you provide leadership by setting the vision and strategic plan needed for a smooth functioning chapter. Your basic responsibilities are to:

- ▶ Establish a local plan of direct participation to achieve the Association's objectives and goals;
- ▶ Chair meetings of the chapter executive committee to plan chapter meetings, programs and activities;
- ▶ Preside at chapter meetings;
- ▶ Serve as principal liaison between the federation, National Office and your chapter for the dissemination of information, issues and implementation of Association programs;
- ▶ Encourage and support the training of other chapter officers in their duties and responsibilities;
- ▶ Appoint appropriate committees, as provided in the chapter's constitution and bylaws, for the conduct of chapter activities and programs;
- ▶ Foster membership growth through both the retention and recruitment of active and retired members;
- ▶ Identify, motivate and develop replacements for future chapter leadership positions;
- ▶ Ensure that each officer and committee chair is familiar with his/her duties and responsibilities.
- ▶ Be available to represent the chapter at official events and meetings of NARFE; and
- ▶ Provide mutual assistance and support to solve problems that an individual member may be unable to solve alone.

## Materials you will need as Chapter President

- ▶ Chapter and federation constitution and bylaws
- ▶ National Articles of Incorporation and Bylaws\*
- ▶ Chapter and Field Officers Manual\*\* (F-10)
- ▶ *Robert's Rules of Order*
- ▶ Copies of past chapter minutes (from outgoing president)

*\*Pages 4 and 9 in National Bylaws (FH-4)*

*\*\*Manuals can be ordered by completing a requisition form (F-18) and sending it to the Supply Office, NARFE, 606 North Washington Street, Alexandria, VA 22314-1914 or on the NARFE membership section of the Web site, [www.narfe.org](http://www.narfe.org).*

## Information that will help you as Chapter President

- ▶ Articles from recent and current issues of *NARFE* magazine
- ▶ Contents of other NARFE publications (*Quarterly News, Recruiter's Journal & Quarterly*)
- ▶ Monthly chapter activity reports and other computer printouts received from NARFE Headquarters
- ▶ NARFE Web site updates.

***Duty #2: To be knowledgeable about the chapter constitution and bylaws, and to ensure that each officer and committee member is familiar with his or her duties.***

## Chapter Constitution & Bylaws

The chapter's constitution and bylaws are important to the president as the basic guides to how the chapter should

# ***NARFE Duties and Responsibilities:***

## ***Chapter Secretary***

### ***Duty #1: Be fully informed on the chapter secretary's responsibilities***

#### **Secretary's Responsibilities**

A chapter secretary provides continuity to chapter activities through the recording, distribution and filing of minutes, reports of chapter and committee meetings, and exchange of correspondence. You should be familiar with all activities of the chapter and committees. Basic responsibilities are to:

- Attend all chapter, executive committee, and other official meetings;
- Record the minutes of each meeting;
- Notify appropriate officers and members of scheduled meetings;
- Maintain a roster of chapter officers and members;
- Handle all chapter correspondence that is not the exclusive duty of another officer;
- Furnish reports and documents to federation and national officers as required;
- Maintain chapter files and preserve all permanent official documents; and
- Order all supplies necessary for chapter operation.

#### **Materials needed**

- Chapter and federation constitution and bylaws
- National articles of incorporation and bylaws
- *Chapter & Federation Officers Manual* (F-10)
- Chronological files of *NARFE* magazine, the monthly chapter newsletter, and other publications from national and federation levels that contain information applicable to chapter secretary responsibilities
- A supply of printed supply requisition forms (F-18), listing all forms and manuals available from the National Office.

### ***Duty #2: Maintain organizational requirements***

*Successful organization is the key to success.*

Most of the organization's ministerial functions fall on the secretary's shoulders. The following actions are required to carry out the functions effectively.

- Arrive at the meeting place well before the meeting begins. In the absence of the president and vice president(s), call the meeting to order and ask the membership to elect a temporary chair to conduct the meeting.
- Determine that a quorum is present at the meeting. If one is not, no binding business can be conducted.
- Record approved minutes of the meetings.
- Maintain an accurate membership roster with addresses and telephone numbers. Obtain the names of new and/or lapsed members from the treasurer and membership chair.\*
- Keep the appropriate officers and telephone committees advised of new members.\*
- Inform chapter and National Office of deaths.\*
- Prepare and maintain a list of committee appointments, and give the chair of each committee a list of the committee members and a description of the committee and its functions.
- Maintain copies of the constitution and bylaws of the chapter and federation, plus the national articles of incorporation and bylaws.
- Maintain copies of correspondence, minutes of meetings, reports and other papers of historical value as part of the permanent records of the chapter. This material should be turned over to the successor when there is a change of secretaries.

## ***NARFE Duties and Responsibilities:***

# ***Chapter Treasurer***

*Most NARFE chapters have the position of treasurer. However, a number of the chapters have combined this function in the position of secretary/treasurer or financial secretary. Relatively few have an assistant treasurer. This pamphlet is addressed to those having the responsibility of keeping the chapter's financial records.*

*In chapters having a financial secretary, the treasurer's responsibility and actions discussed in this pamphlet are generally divided between these two positions. In such instances, the financial functions related to membership and dues generally are handled by the financial secretary.*

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### ***Duty #1: Be fully informed of the chapter treasurer's responsibilities***

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## **Treasurer's Responsibilities**

A chapter treasurer fulfills the vital function of keeping the financial records accurately and current. Basic responsibilities are to:

- Receive chapter dues from the National Office and collect chapter dues from social and associate members and other moneys owed or collected by the chapter;
- Deposit dues from the National Office and other chapter funds received in a federally insured financial institution, preferably in an interest-bearing account;
- Disburse funds only as authorized by the chapter president or other officers or groups as specified in the chapter's bylaws and policies;
- Keep an accurate record of all chapter income and expenses;
- Make a financial report at each meeting (see form F-38, Treasurer's Monthly Report);
- Reconcile membership records and dues paid, in coordination with the secretary and membership chairmen;
- Prepare budgets and provide financial projections for planning purposes.
- Forward national and chapter dues received from new members to the national treasurer, using an F-16 Dues Transmittal Sheet—New Members.

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### ***Duty #2: Process dues and other chapter revenues***

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## **Processing Dues**

Under the unified dues system, members pay their national and chapter dues directly to the National Office. National Life Members and those on Dues Withholding for national dues only can pay their chapter dues to the National Office or directly to the chapter (the chapter would notify National). Chapter dues collected by the National Office are remitted to the chapter monthly with a listing of the members and the amounts paid. The chapter will also receive \$2 for each new member recruited.

Forward any checks received by the chapter for national and/or chapter dues to the National Office. If a check should be made payable to the chapter, it must be endorsed by the chapter as payable to NARFE before forwarding to the National Office.

Social and associate member dues collected at chapter meetings are retained by the chapter. Do not forward these dues to the National Office. Members paying social and associate dues should receive a receipt, and a copy should be kept for the chapter records.

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### ***Duty #3: Maintain all chapter records that pertain to money***

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## **Maintaining Records**

- Books should be posted after each transaction while events are fresh in your mind.

# ***NARFE Duties and Responsibilities:***

## ***Chapter Service Officer***

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### ***Duty #1: Meet the practical needs of chapter members***

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### **Service Officer Responsibilities**

As chapter service officer, you play a vital role in meeting the needs of chapter members and their families. Your basic responsibilities are to:

- Help individual chapter members, their families and survivors take the proper actions to obtain and retain their annuities and survivor, health, long-term care, and federal group life insurance benefits;
- Provide support to members having serious problems with their benefit arrangements and particularly to surviving spouses when they suffer the trauma of a death or serious illness;
- Make the availability of your services and assistance known to all members of the chapter through newsletter articles, pamphlet F-107 (*Service Officers & Centers*) and reports at chapter meetings.

### **What a Service Officer Needs to Know**

To carry out the duties of a service officer, you need to be knowledgeable about the following:

- Federal procedures governing direct deposit and delivery of annuity checks
- Insurance and federal employee health benefits procedures
- Survivor benefits under current laws administered by the Office of Personnel Management (OPM)
- Change of beneficiary procedures
- Rights of divorced spouses to survivor benefits
- Death benefits
- State and federal income taxes as related to federal annuities and withholding
- Social Security referral information
- Requirements for other government programs.

This information is incorporated in NARFE's *Service Officer Guide* (FH-10)\*, which can be obtained from the Supply Office, NARFE, 606 N. Washington St., Alexandria, VA 22314.

*\*Please limit requests to two copies per chapter or Service Center. The F-18 order form or the NARFE Web site can be used.*

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### ***Duty #2: Facilitate liaisons between members and OPM***

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### **Service Officer Role**

A major aspect of the service officer function is to assist chapter members with problems involving programs managed by OPM and to facilitate communication between the two. Members, families and survivors frequently need help in correctly preparing and forwarding the reports and forms required for their claims.

Service officers can enhance the service program by frequently reviewing useful information at chapter meetings and in chapter newsletters.

Have the following information on hand when contacting OPM or other agencies:

- Date of birth
- CSA or CSF number
- Social Security number
- Date and place of marriage to current spouse, if applicable
- If no longer married, name of each spouse and how marriage terminated, such as death or divorce, with dates
- Government department where last employed
- Place of last employment
- Date of separation
- If a veteran, date of start of active service, date of separation, last rank or grade and serial number.

## ***NARFE Duties and Responsibilities:***

# ***Membership Chair***

### **Basic Responsibilities**

- Create, implement, monitor, document and manage membership development plans and materials for your chapter to recruit and retain members, and encourage former members to rejoin.
- Publicize NARFE's presence and services to federal employees, retirees and survivors in your area. Increase the general public's awareness of NARFE.
- Work with other chapter officers to ensure that 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.
- Communicate between chapter and federation membership chairs and NARFE Headquarters staff (Member Records, Federation & Chapter Services, and Recruitment & Retention).
- Forward names and addresses of prospective members to the Recruitment & Retention Section.

### **What a Membership Chair Should Know**

#### **Who can join?**

Membership is open to civilians who are or will be eligible to receive an annuity or survivor annuity from the federal retirement programs of any agency of the United States government or the District of Columbia\*, including:

- Retirees
- Active employees
- Spouses and surviving spouses of those eligible to join NARFE
- Former employees
- Former spouses legally entitled to a federal survivor annuity.

Enrollment in NARFE, includes the National Association and a chapter assigned by ZIP code or member preference. Members may transfer to a different chapter at any time.

### **NARFE membership benefits include:**

- Assertive legislative representation on federal and state levels;
- Liaison with the Office of Personnel Management (OPM) to help retirees and survivors with their benefits;
- Informative monthly magazine, *NARFE*, the prime source for information about federal retirement and health care issues; up-to-date information through [www.narfe.org](http://www.narfe.org) and NARFE e-mail;
- United network of support with other federal employees and retirees;
- Opportunities for leadership, political action and community service;
- Eligibility for college scholarships for your children and grandchildren; and disaster-relief grants;
- NARFE "Perks," including, but not limited to: insurance programs available through our affinity partners, discounts on moving, and travel services, etc.

### **Membership application process:**

Special promotions and incentive offers to increase membership are often available at NARFE Headquarters. One of the membership chair's responsibilities is to provide chapter members and prospects the most current information on incentive programs.

There are several ways to join. Prospective members may complete one of several applications and mail with payment information to NARFE National or hand in the material at a chapter meeting. An easier way to join is to call NARFE's toll-free Recruitment & Retention line, open Monday through Friday, 8:15 a.m. - 4:45 p.m., at 1-800-627-3394. Yet another way to join is by visiting us online at [www.narfe.org](http://www.narfe.org).

To obtain chapter dues information, prospective members can phone NARFE Recruitment & Retention, toll-free, at 1-800-627-3394, or contact a local NARFE chapter.

NARFE's mailing address is:  
606 North Washington Street  
Alexandria, VA 22314-1914