

**COLORADO STATE FEDERATION OF CHAPTERS
OF THE
NATIONAL ACTIVE AND RETIRED FEDERAL EMPLOYEES ASSOCIATION**

**EXECUTIVE BOARD
GUIDELINES**



**ASSEMBLED
JULY 2009**

AMENDED MARCH 19, 2020

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COLORADO EXECUTIVE BOARD

GENERAL GUIDELINES

INTRUDUCTION

The purpose of the Board is to carry out the activities of the Colorado Federation when the Federation Conference is not in session. Article VII, Sections 1-3 of the Bylaws established and generally describes the function of the Board.

The purpose of these Guidelines is to supplement the Federation Bylaws. Where these Guidelines conflict with the Federation Bylaws, the Bylaws shall be followed.

There are also Standing Rules within the Colorado Federation that are related to the details of the administration of the Federation, the Executive Board, and the Federation Conference.

The basic duties and responsibilities compiled in this document are to be made available to those in the position of Officer, Chairperson, and Committee when elected or appointed. Any revision shall be decided upon by the President and the date noted at the bottom of each new revision along with page two of this document.

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.1

PRESIDENT

The basic duties and responsibilities of the President are set forth in Article IV, Section 5 (A) of the Bylaws.

The duties and responsibilities of the President are all inclusive and include responsibility for all activities within the Federation. This guideline is presented to assist with that objective and to help eliminate errors and omissions. The guideline is not all inclusive nor is it intended to be.

1. Retain constant dialog and day-to-day direction of four elected Federation Officers.
2. Develop Conference Agenda, invite National Resident Officer, and assist Chapters to prepare for a Conference, attend pre-Conference meetings.
3. Preside at Federation Executive Board meetings and State Conferences. Ensure meeting times and location is arranged. Prepare agenda.
4. Preside at regularly scheduled meetings for Federation Executive Committee Meetings and prepare agenda. Agenda sent to members in advance of meetings.
5. Maintain communication with other Federation Presidents and National Resident Officers and their staffs.
6. Work closely with the Regional Vice President.
7. Must be interactive with other Organizations, FEEA, DFEB, Senior Lobby, etc.
8. Arrange for training of new officers, Federation, and Chapter wide.
9. Responsible for directing and assisting in filling appointed officer positions.
10. Attend Legislative Committee meetings and accompany legislative Committee Members to visit Senators and Congressmen and/or their representatives.
11. Assist NARFE-PAC officer concerning funds distribution from requests received by Political candidates
12. Write an article for Federation newspaper and answer all correspondence.
13. Keep abreast of NARFE issues and related topics within state, share information with Chapter Presidents and members.
14. Present awards to those who give their time and talent to keep the chapter or Federation viable and prosperous.
15. Assure legislative alerts are disseminated.
16. Make any necessary changes of zip code or Logistic Support Area (LSA) assignments to chapters.
17. In conjunction with Treasurer, prepare and submit a Fiscal Year Budget for review and approval by the Executive Board.
18. Authorized to co-sign checks for vouchers regarding other Executive Board members and in absence of Treasurer when needed.
19. Perform all other duties assigned and ensure Executive Board members, Special Assistants and Standing Committee members perform their duties and responsibilities in accordance with:
 - a. Colorado Bylaws.
 - b. Executive Board Standing Rules.
 - c. Robert's Rules of Order (Newly Revised, 10th edition)
20. Sign contracts for Conferences hotels.
21. Work with Secretary to assure all e-Postcards are filed for the year.

President will be available to visit chapters frequently; become familiar with chapter members and chapter's particular problems. Assist chapter or district when advised of a chapter faltering. Distribute National reports to officers as needed. Prepare and send letters to chapters concerning upcoming Federation Executive board meetings and Conferences. Determine location and prepare agenda for both.

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.2

VICE PRESIDENT MEMBERSHIP

The purpose of the office of the Vice President-Membership is to act as a backup to the President and to carry out specific assigned tasks. The basic duties and responsibilities of the Vice President-Membership are set forth in Article IV, Section 5 (B) of the Bylaws.

The duties and responsibilities of the Vice President-Membership are all inclusive and include responsibility for all activities within the Federation. This guideline is presented to assist with that objective and to help eliminate errors and omissions. The guideline is not all inclusive nor is it intended to be. The mission of the Vice President-Membership will chair and lead an effective recruitment and retention program by fulfilling the duties listed below.

1. Appoint a Federation membership committee of 3 to 7 members and serve as the committee chairperson to carry out duties 2 through 19 below.
2. Develop and implement a Federation Membership Plan compatible with the National Membership Plan.
3. Provide training to chapter personnel with membership responsibilities.
4. Work with chapters to develop, test and evaluate new recruitment/retention methods and to improve existing methods.
5. Assist chapters to contact persons whose memberships have expired and encourage them to renew.
6. Encourage chapters to apply to NARFE Headquarters for matching funds for recruiting operations.
7. Assist chapters in the development of Chapter Membership Plan.
8. Encourage chapters to promote dues withholding.
9. Assist chapter to make their meetings of greater interest and importance for their members and to ensure that new members are made welcome.
10. Ensure that chapters make known to their members and potential members, especially Federal workers, the many benefits of NARFE members services such as lobbying to protect earned benefits or assistance with OPM issues.
11. Call quarterly meetings of the Federation Membership Committee to assess progress on the Membership Plan.
12. Report progress on the Federation Membership Plan to the Federation Executive Board quarterly subsequent to the assessments in 11 above.
13. Coordinate NARFE recruiting with the Federal Executive Board, Federal Executive Associations and major Federal agencies. For example, designate a Federation member who works for or retired from BLM as the "point person" for the BLM.
14. Be informed on NARFE membership eligibility requirements, member benefits, recruitment/retention methods, membership applications and membership classes.
15. Submit budget estimates for membership activities to Budget & Finance Committee.
16. Obtain information from the Federation President about NARFE members who have moved into Colorado and forward that information to appropriate chapters.
17. Perform other duties as prescribed by the Federation Bylaws.
18. Send thank you letter to listed recruiters from monthly M-260 report.
19. See "Pre-Retirement Seminar Coordinator", Guideline 23.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.3**

VICE PRESIDENT LEGISLATION

The purpose of the office of the Vice President-Legislation is to preside at all Federation meetings in the absence of the President and Vice President-Membership and to carry out specific assigned tasks. The basic duties and responsibilities of the Vice President-Legislation are set forth in Article IV, Section 5, C of the Bylaws.

The duties and responsibilities of the Vice President-Legislation are all inclusive and include responsibility for all activities within the Federation. This guideline is presented to assist with that objective and to help eliminate errors and omissions. The guideline is not all inclusive nor is it intended to be. The mission of the Vice President Legislation will be to serve as Legislative Committee Chairperson and by fulfilling the other duties listed below.

1. Serve as Legislative Committee Chairperson in the following capacity:
 - a. Coordinate the lobbying effort of the Colorado Federation on a statewide basis.
 - b. Provide leadership to the Federation Chapters and Congressional District Leaders in understanding legislative issues, chapter recruiting legislative leaders, organizing advocacy groups, and developing action programs.
 - c. Serve as focus for lobbying of Colorado's U. S. Senators and U.S. representatives.
2. Establish a Legislative Advocacy group for the following Mission:
 - a. To lobby our elected Federal Senators and Representatives and coordinate the lobbying effort of the Colorado Federation on a statewide basis. To develop plans and methods to effectively lobby the Colorado Congressional Delegation on adoption of NARFE's national legislative agenda and, as needed, the Colorado General Assembly on issues gaining a consensus of support among the Federation chapters. To accomplish the mission the Advocacy group will:
 - i. Coordinate the legislative interests and resources of Colorado NARFE members by proposing action programs and soliciting members' voluntary support through their chapter and districts.
 - ii. Provide leadership to the Federation chapters and districts in understanding legislative issues, recruiting legislative leaders, organizing legislative committees, and developing effective action program at the chapter and Congressional District level.
 - iii. Serve as focus for all lobbying of Colorado's U. S. Senators.
3. Coordinate NARFE-PAC contributions with Advocacy committee members.
4. Develop a structured and consistent approach to meeting and dealing with the congressional delegation and then promote that approach to all chapters and members.
5. Help establish a Congressional District Leader (CDL) for each Congressional District. Work closely with every Congressional District Leader giving supervision and guidance. (See **GUIDELINE NO.29**)

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.4**

SECRETARY

The purpose of the office of the Secretary is to keep records of the proceedings of all Federation and Executive Board Meetings. The basic duties and responsibilities of the Secretary are set forth in Article IV, Section 5 (D) of the Bylaws.

The duties and responsibilities of the Secretary are all inclusive and include responsibility for activities within the Federation. This guideline is presented to assist with that objective and to help eliminate errors and omissions. The guideline is not all inclusive nor is it intended to be.

Specific Duties of Secretary in Office:

1. All resolutions passed by the members prior to a State Conference concerning action at the national level, (National Bylaws, national legislation, and some General resolutions if they are advisory in nature to the national Office) will be signed by the Federation President and secretary and be forwarded to the National Secretary immediately after the State Conference. This is especially important in the even numbered years when the National Conference convenes.
2. Creating and maintaining Directories. The Federation Officer Directory is designed for use by Federation Officers and Chapter Presidents to communicate with each other. The Chapter Directory may be used by Federation Officers and Chapter Presidents to provide the names of those filling the many appointed positions which Chapter Presidents have occasional need to contact.
3. Accurate recording of each meeting will include: Kind of meeting; date, hour, and place of meeting; Name and title of officer presiding and presence of quorum; Approval of previous minutes; Record of reports, of each main motion with name of person who made it, of points of order, of counted votes; Time of adjournment, and Signature of secretary.
4. Works with President to assure all e-Postcards are filed for the year. (See attached procedures)

Other:

For Federation Executive Committee Meetings:

Secretary takes minutes, sends draft to Committee members within one week. When corrections/addition/deletions are received, final copy is to be sent to Committee members within one week.

For Federation Executive Board Meetings:

The President sends Board Agenda and other necessary info to Secretary to print and mail out to: Federation Officers; Chapter Presidents; Appointed Officers and Committee Chairs.

Revised October 1, 2017

STEPS AND PROCEDURES FOR FILING THE E-postcard

1. The first step is to go to the internet and enter <http://www.irs.gov/990n/>.
 2. The first page to show up on the monitor will be the Home page for e-Postcard. (See attachment “A”)
 3. The next step is to click on “Create your Form 990-N (e-Postcard)”
 4. You will now be on the “login” page. (See attachment “B”)
 - a. Enter the Login ID
 - b. Enter Password
 - c. **PRINT PAGE**
 5. The next page may be the “Verify Filer information”. (See attachment “C”)
 - a. There is one statement of the three statements that has to be answered.
 - b. **PRINT PAGE**
 - c. Click on the one that says, “Yes, my information is correct. Let me proceed” if nothing has changed.
 - d. Click on “No, I need to update my information before I proceed”, if it is only an email address change or name change.
 - i. If there is a change you will be on a page “Manage Users” to “Edit” the changes.
 - e. There is no need to have a NEW Login ID for this process.
 - f. **PRINT PAGE**
 6. The next page should be the “Electronic Notice-Organization Information” where information will be entered.
 - a. The first line should show the year from January to December.
 - b. The next line “Has your organization terminated or gone out of business?”
 - i. Unless the chapter has closed, this should be answered always “NO”.
 - c. The next line “Are your gross receipts normally \$50,000 or less?”
 - i. This should always be answered “YES”.
 - d. **PRINT PAGE**
 - e. You will now click on “Next Page”
 7. The next page should be the “Electronic Notice-Organization Address Information”.
 - a. On the line “In Care of Name” will be entered the name of the person filling out the form.
 - b. Enter the Organizations mailing address information
 - c. On the line “Type of name”, enter “Business”.
 - d. Business Name – Line 1 should be the name of the Chapter. Example: “Boulder Chapter 293”.
 - e. Address information as entered above must be reentered here again.
 - f. Click on “Save Changes” before you submit.
 - g. **PRINT PAGE**
 - h. Click on “Submit Filing to IRS”.
 8. After submitting you will now be returned to “Form 990-N (e-Postcard) Submitted”
 - a. **PRINT PAGE**
 - b. Click on “Go to Filing Status Page”
 9. While on “Check Filing Status” page.
 - a. **PRINT PAGE**
 - b. Click on “View Form 990-N (e-Postcard)”
 - i. **PRINT PAGE**
 - ii. Close page
 - iii. It will return you to “Check Filing Status” page
 - c. Click on “Control Panel”
 - i. **PRINT PAGE**
 10. You are now completed and have filed the Form 990-N (e-Postcard)
 - a. Go to top of screen and “Log Out”
 11. Send “ePostcard letter” with copy of results to each Chapter President.
- May 2, 2013

**NATIONAL ASSOCIATION OF ACTIVE AND RETIRED FEDERAL
EMPLOYEES (NARFE)
COLORADO FEDERATION OF CHAPTERS**



SAMPLE LETTER

DATE

To: Chapter President

Based on a decision by the Colorado Executive Committee on February 14, 2013, and the approval of the Federation Board on May 2, 2013, the Federation will take care of all future Chapter e-Postcard filings with the IRS. A copy of all transaction results will be sent to the chapter president of the filing for the chapter.

This will be included as a guideline responsibility by the Secretary of the Federation (Guideline #4). It is the responsibility of the Chapter to ensure that they have received and have on file the most current e-Postcard IRS Form 990-N for their chapter for each calendar year. If the Chapter has not received a copy by February 1st of the current filing year from the federation, they are to follow up with the Federation Executive Committee.

Enclosed is your copy for the year of 20XX.

Colorado State Federation President

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.5**

TREASURER

The purpose of the office of the Treasurer is to keep accurate and current financial records of the Federation. The basic duties and responsibilities of the Treasurer are set forth in Article IV, Section 5 (E) of the Bylaws.

The duties and responsibilities of the Treasurer are all inclusive and include responsibility for all activities within the Federation. This guideline is presented to assist with that objective and to help eliminate errors and omissions. The guideline is not all inclusive nor is it intended to be.

FUND CONTROLS AND REPORTING:

1. Establish a bank account in a Federally Insured Financial Institution for Colorado Federation of Chapters.
2. Establish and maintain a Ledger showing receipts and expenses of the Federation. Prepare a monthly report of receipts and disbursements comparing actual income and expenses with the approved budget. The Fiscal Year is January 1 through December 31.
3. Draw and sign checks against Federation accounts when expenditures are approved in writing by the President, by direction of the Executive Board, or are included in amounts in specific items of the approved Federation Budget.
4. All payments are entered into the Ledger by check number, payee, dollar amount, and allocated to expense categories in accordance with the approved budget.
5. Transfer funds among Federation accounts when deemed appropriate and necessary by the Executive Committee.
6. All receipts and disbursements shall be posted into the Ledger.
7. Maintain up-to-date records of receipts and expenditures of the Federation.
8. Provide detailed financial statements for the Executive Board and Conference meetings and at other times as may be requested by the President. Chair the Budget Committee in the preparation of the Federation budget for the ensuing fiscal year.

ADMINISTRATIVE PRESPONSIBILITIES:

1. Maintain financial records in accordance with Records Management.
2. Maintain file folders on incoming and outgoing correspondence on a fiscal year basis. All vouchers approved for payment will be in check number sequence. All other financial records should be maintained in an orderly sequence by month.
3. Attend the Colorado Federation Conference and all meetings of the Executive Board.
4. Perform other duties as assigned by the President and/or Executive Board, as prescribed in the Bylaws, and/or other National and Federation directives and procedures, including assisting chapter treasurers as needed.

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.6**

STANDING COMMITTEES

The purpose of Standing Committees is to perform specialized tasks for the benefit of the Federation and chapters thereof.

1. As provided in Article IV, Section 5 (A),3 of the Federation Bylaws, the Federation President shall appoint a Chair to committees.
2. After appointment, each Committee Chair will strive to have one or more committee members on their committee.
3. A plan of action will be developed from suggestions and ideas of the committee members and from elsewhere if requested.
4. The chair of each Standing Committee can provide a news article from time to time, to the Editor of the Colorado Federation Newspaper. The article may be about the Committee activities and should be informative and pertinent to current activities.
5. All standing Committee Chairpersons shall prepare written reports of Committee activities for presentation at the Conference and Executive Board meetings.

Revised October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.7**

MEMBERSHIP COMMITTEE

The purpose of the Membership Committee is to assist the chapters in developing and carrying out recruitment and retention programs. The Federation Vice President-Membership will be the chair of the Membership Committee.

1. The Chair will:
 - a. Form a Membership Committee.
 - b. Develop a plan that supports all National membership initiatives with incentives that could enhance these programs, where applicable, to be implemented by chapters.
 - c. Establish a results oriented recognition system to reward chapters and/or individuals for outstanding efforts in membership recruitment and retention activities;
 - d. Assist chapter's executive board and membership chairs to develop a recruitment/retention plan that motivates members to gain and retain members;
 - e. Provide schedule of health fairs annually with incentives to aid chapters to participate during open season at their community federal installations;
 - f. Provide training as needed and as resources permit; and
 - g. Make a report at the Federation Conference on the status and results of the Federation's recruitment and retention efforts.
 - h. Forward names and addresses of prospective members to the Recruitment and Retention section at Headquarters and request recruitment materials.

2. Committee Members will:
 - a. Assist the chair in carrying out the activities of this committee.
 - b. Establish challenging and attainable recruitment and retention goals.
 - c. Devise a method to track recruiting and retention by chapters and individuals.
 - d. Implement membership campaigns, coordinating with national's Recruitment and Retention Plan.

3. Material needed:
 - a. The Membership Marketing Manual (FH-19)
 - b. Chapter & Federation Officers Manual (F-10)
 - c. Membership Services Manual (FH-6)
 - d. Pop Quiz (F123)
 - e. 10 Worst Mistakes Brochure (F-126)
 - f. The Recruiter's Journal & Quarterly (Downloadable from NARFE web)
 - g. Membership Summary Report (M-110)
 - h. Chapter Activity Report (M-112)
 - i. Semi-Annual Membership Roster (M-114)
 - j. Online Activities Module (OAM) is more of a real-time quality report to use for all membership data.

4. Health Fair Recruitment
 - a. The following attachments are sent to all chapters in preparation of setting up a table at health fairs once the locations, times, and dates are disseminated by the Federation Vice President-membership.
 - b. The following attachments are:
 - i. FEHBP Open Season Health Fairs letter.
 - ii. Health Fair Coordinator Information Sheet
 - iii. Event Report Form
5. See “Pre-Retirement Seminar Coordinator”, Guideline 23.



SAMPLE LETTER

2732 S. Garfield Street
Denver, CO 80210
September 30, 2013

To: Chapter Presidents and Chapter Membership Chair.

From: Eva C. Heller, 1st Vice President – Membership

Subject: FEHBP Open Season Health Fairs – November 14 – December 12, 20XX

I am asking that each Chapter immediately start ordering Health Fair material in anticipation that we will once again be given the opportunity to have a NARFE table at the Anthem Blue Cross and Blue Shield Health Fairs held throughout the State. In talking with the National NARFE office, they have indicated it is not too early to start ordering material now. NARFE will not be filling packets for Health Fairs. You must order separate material and make your own packets, if packets are desired.

Please check the F-18, Requisition for Printed Supplies, www.narfe.org, for the latest material. In 20XX, 61 Health Fairs were held in the Metro Area, Durango, Montrose, Grand Junction, Greeley, Colorado Springs, Fort Collins, Loveland, Florence, Pueblo, and Longmont.

I have not yet received the Colorado Health Fair locations list but I anticipate receiving them in the next couple of weeks. Once I make the health fair location assignments I will notify you. It will be your responsibility to get volunteers from your chapter to cover your assigned Health Fairs. If your chapter is not able to cover an assigned location for some reason, other than being denied admittance, please contact me within a week of receiving the location assignments.

When you get the list of assigned health fairs, please contact the named agency person at your assigned locations for permission to participate. If given permission, inquire as to the number of employees at that location, whether a table will be available for use, the entrance location to the building, and the needed identification for entrance. Many of the location assignments made will be very similar to last year, so you should have a good idea about the quantity of material you need to order based on your prior experience. **Please be sure you check the entire list when I send it because your chapter may be covering more than one health fair.**

It is suggested that you **do not order** more than you think you'll need. A preferred method for an initial order would be to call Recruitment and Retention –1-800-456-8410 Ext. 277, Jackie Bryant, or e-mail rr@narfe.org.

Please order, at a minimum, the following as they are very helpful pamphlets you would want to hand out at the Health Fairs.

NARFE Magazines

F-135 – Membership Application (08/13)

F-123 – Federal Employees Pop Quiz (08/12)

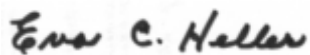
F-126 – 10 Worst Mistakes Federal Employees Can Make (04/14)

M-2 - Prospect Information Card (04/15) (Use to collect names & addresses)

The M-2 - Prospect Information Card (04/15) is convenient and professional to use in gathering prospective member information. It is suggested that if recruiters cannot get a signed application, at least they try to get a completed legible Prospect Information Card for submitting to NARFE Recruitment and Retention. The prospective member will receive material from NARFE, again encouraging them to join. Recruiters should put their I.D. No. on the card to receive credit when the prospect joins. Make sure the name and address is legible before sending the Prospect Information Card to NARFE. If you cannot read it, neither can NARFE.

Please complete one Event Form (attached) for each Health Fair your chapter participates in. Please e-mail, or send postal mail, the completed form to me as soon as possible after having participated in a Health Fair. The information you forward will be included in the report on our Federation's Health Fair participation.

If you have any questions, please call me at 303-756-4551 or e-mail at evaheller@juno.com.



Attachments: Health Fair Coordinator Information
Event Report Form

HEALTH FAIR COORDINATOR INFORMATION

Updated September 23, 2011

Open Season Health Fair listings are prepared by Jane Fluekiger, Anthem Blue Cross and Blue Shield of Colorado, Federal Employee Program, 700 N. Broadway, Denver, CO 80273. The report covering dates, locations, and times is mailed to the Federation VP, Membership, for distribution to chapters. Participating chapters receive a copy of the Open Season Health Fairs report with marked locations for their chapter.

Chapter Health Fairs Chair Duties:

Contact the named contact personnel at assigned locations for permission to participate. If given permission,

Inquire as to the number of employees at that location

Inquire and confirm if a table will be available for use

Inquire about specific entrance locations

Inquire about needed identification for entrance

Health Fair materials should be immediately ordered from NARFE. Depending upon Health Fair dates, material may be ordered using the Request for Printed Supplies (F-18) on www.narfe.org. A preferred method for an initial order is to call Recruitment & Retention (800) 627-3394 and place the order and giving your first scheduled date. Ordered material includes:

NARFE magazines

F-135 – Membership Application

F-123 – Federal Employees Pop Quiz

F-126 – 10 Worst Mistakes Federal Employees Can Make

M-2 - Prospect Information Card

Other material to have prepared:

Letter by National, Federation or Chapter President

Tablecloth

HOLDERS for any posters taken

Tablet, pens, scotch tape, and a tablet

Food storage bags to make up prepared packets for distribution

Small wheeled suitcase for literature, etc.

Nice to have some wrapped candy to hand out

Each Health Fair team should be provided with the name of the facility, address, phone number, and the time of the scheduled location. The name of the contact person that gave permission to participate, and any provided instructions, are to be included for the team. A list of provided material should be included. The Team should determine if there is a location where they can leave some or all of the unused material.

NARFE EVENT REPORT FORM

Rev. October 2017

From: Vice President – Membership

Subject: Participation in NARFE and Other Association Events

Please complete the following and return to me. It can be mailed to my address: 1031 Sparrow hawk Dr., Highlands ranch, CO 80129-5634 or emailed to impinna@gmail.com. Please complete this form shortly after you have participated, attended, spoke on NARFE, signed up members or any other related function. The information provided will help in tracking Colorado's involvement. This information is needed when reporting the results of the Colorado effort and active involvement in marketing or representing NARFE for recruitment purposes.

1. Your Name and Chapter Number and Date of Event:

2. List the event and organization or association(s) you or your Chapter participated in:

3. List the literature and quantity taken for distribution.

4. How many individuals received packets and material:

5. How many M-2 Prospect cards were collected:

6. Were Prospect cards reviewed for legibility and mailed to Recruitment & Retention?
Keep a copy of the cards for your follow-up contact.

Comments.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.8**

NATIONAL LEGISLATIVE COMMITTEE

The purpose of the Committee on Federation Legislation is to monitor the Federal Legislative process, to alert the Federation to matters of interest and to be the focal point of NARFE contacts with the Colorado Delegation.

- 1) Article VI: COMMITTEES, Section 1, of the Federation Bylaws, states that there shall be a Standing Committee for Legislation. Article IV: OFFICERS, Section 7 (C), the Vice President-Legislation shall serve as Legislative Committee Chairman.
- 2) The Legislative Committee Chairman will:
 - a) Keep posted on Federal Legislation of interest to NARFE and senior citizens.
 - b) Maintain communications with the National Office's Legislative Staff.
 - c) Communicate with Senators and representatives by visit, telephone, letter or E-mail.
 - d) Keep federation officers, chapters and Committee members up-to-date on legislation, Congressional actions and procedures.
 - e) Keep lines of communications open with all Committee members and provide copies of written communications to all Committee members.
 - f) Be fully informed and prepared to brief federation officers on all resolution relating to Federal Legislation to be considered at the State Conference.
 - g) Help establish a Congressional District Leader (CDL) for each Congressional District. Work closely with every Congressional District Leader giving supervision and guidance. (See **GUIDELINE NO.29**)
- 3) This member:
 - a) May request chapter legislative chairs make congressional visits in order to establish close working relationships.
 - b) Makes a report of each Congressional visit to the Executive Board and to NARFE Legislative Department.
 - c) Should be prepared to answer questions, assist in training seminars and help chapter carry out an effective legislative program.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.9**

STATE LEGISLATIVE COMMITTEE

The purpose of the Committee on State Legislation is to monitor the Colorado General Assembly, to alert the Federation in matters of interest, to recommend advocacy on selected bills and to be a focal point of NARFE contacts with the legislature. The Federation President may appoint, subject to Executive Board approval, a chairperson for a state legislative committee who will:

1. Keep posted on legislation of importance to NARFE members and seniors.
2. Develop contacts with state legislators, their assistants and staff of the Colorado Legislative Council.
3. When urgent legislation of particular interest to NARFE is introduced, confer with other committee members and recommend/expedite position taking to the Federation President/Executive Committee.
4. Testify at committee hearings on behalf of positions adopted and advocate with individual legislators prior to floor votes.
5. Collaborate with and provide mutual support on federal/state legislation.
6. Work in coalition with like-minded advocacy groups.
7. Research issues, write reports, answer questions, assist in training seminars and help chapters carry out an effective state legislative program.

Worthy of note: Congress meets year-round, with occasional recesses. Our state legislative session lasts only 120 days between January and early May. An average of 600 bills are introduced and disposed of, plus numerous resolutions and memorials. A bill can be introduced one day, assigned to committee for a hearing the following week and back to floor consideration on 2nd & 3rd readings by the next week. Anyone following legislation must work fast in analyzing the bill, checking its fiscal impact report and arriving at a position quickly in order to testify in reasonable fashion at committee hearings and lobby individual legislators. Taking policy decisions must be expedited for advocacy efforts to have any impact—whether in support or opposition.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.10**

PARLIAMENTARIAN

The purpose of the Office of the Parliamentarian is to advise the Federation President and other officers, committees, and members, on matters of parliamentary procedures. The Federation President shall appoint, subject to approval of the Executive Board, the position of Parliamentarian.

1. The duties of the Parliamentarian are as stated in Roberts Rules of Order, Newly Revised, 10th Edition (Pages 449-451, 589-590)
2. When requested by the President, will confer with the president on business to come before a meeting and assist with preparation of the agenda. During a meeting, the parliamentarian will provide advice to the chair and when requested to any other member.
3. The Parliamentarian does not make motions, participate in debate or vote unless he/she is a member of the assembly and the vote is by ballot.
4. The Parliamentarian attends Board and Committee meetings if requested to do so.
5. He/she provides advice on Bylaws, Standing Rules and Conference Rules, assists with workshops and training sessions when requested.

During the period of Conference preparation and while the Conference is in progress, serves as advisor to the President, the Credentials Committee, the Committee on Standing Rules, the Program Committee, the resolutions Committee and the Election Committee.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.11**

NARFE-PAC COORDINATOR

Fund Raising:

1. Provides guidance and instructions to chapters.
2. Monitors Federation fund raising efforts and data.
3. Recommends strategies to improve performance.

Candidate Contributions:

1. Monitors candidate's position and votes on NARFE Legislative issues.
2. Acts on specific fund request forwarded by National with Federation President's approval.
3. Obtains input from Federation Legislative Committee,-and other appropriate sources.
4. Provides written recommendations and rationale to Federation President for signature and forwarding to National.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.12**

AWARDS COMMITTEE

An Awards Committee Chairperson is appointed at each Federation election. The current Chairperson may be reappointed.

The Chairperson's Responsibilities:

1. Receives a letter from the President which is photocopied and sent and/or emailed to all Chapter Presidents prior to a State Conference. The letter gives details of the awards and how the applications are to be documented. Late deadlines are noted in the letters for all award applications.
2. Selects two NARFE members who exhibit knowledge of the organization and fairness in judgment to fully form the Committee.
3. Calls meeting(s) of the Committee at a central location to begin the selection of awardees for:
 - a. Hall of Fame Award for NARFE
 - b. Distinguished Service Award for NARFE
 - c. Meritorious Service Award for NARFE
 - d. Community Service Award
4. The Committee determines if the Nominee meets the criteria for the designated award and if the award submission met the established deadline. If the number of awards to be given is limited, selections are made by the Committee using a score sheet.
5. Certificates for Distinguished Service and Certificates of Appreciation can be requested from NARFE Headquarters. Certificates for Meritorious, Community Service, and Hall of Fame Awards are prepared locally. If desired, seals and red ribbons can be requested from NARFE Headquarters and applied.
6. Plaques for all awardees are selected, designed, and engraved at an acceptable engraving and printing firm.
7. Award plaques and certificates are ordered and paid for by the Committee Chair and reimbursed from the NARFE Federation Treasurer.
8. Prepares or modifies, when needed, summaries to be read at the presentation of the award(s). Assist the Federation President with the award presentations.
9. A list of awardees is updated after presentation at Conference. The nomination forms for all winners should be filed each year and the files maintained for ten (10) years.
10. Score sheets are revised and prepared for the work of the next year's committee.
11. Miscellaneous items are determined as needed.

12. All nominators of awardees should receive a note, email or phone call after selections to notify them that their nominee was or was not selected for an award and thank them for participating in the process. An invitation to attend the State Conference to receive the award should be extended by the nominator to those who have been selected.
13. A thank you note or email is sent by the Committee Chairperson to Committee Members for their work.
14. Other details of the award-selection process are managed by the Committee Chairperson.
15. Previous Chairperson serves as ex officio member on the current committee and works with the successive Committee Chairperson as needed.
16. Perform other duties as required.

REIMBURSEMENT EXPENSES ENTITLED FOR COMMITTEE CHAIRPERSON

1. Travel for Awards Committee meetings for selection of awardees (2-3 per year).
2. Travel for NARFE Conference Awards presentation.
3. Attending Executive Board meeting and presenting “awards” details and answering questions.
4. Photocopying and postage for letters about awards to Chapter Presidents, etc.
5. Costs for plaques, certificates and framing as needed.
6. Any other expense items pertinent to the business of the Awards Committee work.

REIMBURSEMENT EXPENSES ENTITLED FOR COMMITTEE MEMBERS

Travel for Awards Committee meetings (2-3 per year).

Attachments:

NOMINATION FORM COVER SHEET
NOMINATION FORM – HALL OF FAME AWARD
NOMINATION FORM – DISTINGUISHED SERVICE AWARD
NOMINATION FORM – MERITORIOUS AWARD
NOMINATION FORM – COMMUNITY SERVICE AWARD
AWARDS CRITERIA

Amended October 1, 2017



NATIONAL ACTIVE AND RETIRED FEDERAL EMPLOYEES ASSOCIATION

COLORADO FEDERATION OF CHAPTERS

AWARD ACKNOWLEDGEMENT

(DATE)

Over the years many members have gone beyond and taken the initiative to donate time and effort to NARFE's mission in various projects, officer positions, committees, or other facets that have helped improve the mission of NARFE without any reciprocation. It is one of these following award categories attached that those individuals can now be recognized for their contribution to NARFE.

Please read the criteria for each award that is explained to find the appropriate award that fits the individual's involvement.

It is now incumbent on you to recognize that individual or persons by filling out and submitting the nomination form for the attached type of award as listed:

- a. Hall of Fame Award for NARFE
- b. Distinguished Service Award for NARFE
- c. Meritorious Service Award for NARFE
- d. Community Service Award

Once everything has been completed, send the nomination form along with the award type to the Awards Committee Chairperson. The Committee will determine if the Nominee meets the criteria for the designated award and if the award submission met the established deadline. If the number of awards to be given is limited, selections are made by the Committee using a score sheet.

Signature here

(NAME), Federation President

Amended October 1, 2017



NOMINATION FORM COVER SHEET

Send the completed original and 1 copy of this form, along with the written nomination package and 1 copy to:

NAME
ADDRESS
STATE
Phone:
Email:

Nomination(s) must be received by (Date)

AWARD CATEGORY: _____

NOMINEE: _____

NARFE CHAPTER _____ AND MAILING ADDRESS:

NOMINATOR SIGNATURE: _____

PHONE NUMBER WITH AREA CODE: _____

NARFE POINT OF CONTACT: _____

PHONE NUMBER WITH AREA CODE: _____

CHAPTER PRESIDENT SIGNATURE: _____

PLEASE ENSURE THE NOMINATION PACKAGE INCLUDES:

1. Nomination form cover sheet (original and one copy)
2. Nomination justification narrative (not to exceed 2 pages, original and 1 copy) (Remember to begin by restating criteria factors that are being supported in the narrative)
3. A short summary statement about Nominee(s) and their accomplishment for use during presentation of the award (original and 1 copy)
4. Small Chapter _____ (300 below) Large chapter _____ (301 and above)

DUE DATE:



**NOMINATION FORM
HALL OF FAME AWARD**

This nomination is submitted for a Hall of Fame Award for:

Active Federal Employee Retiree Spouse (Circle the appropriate category)

If he/she is currently serving as an officer, either appointed or elected – please specify all offices and dates:

Chapter # _____ Phone # _____ E-Mail _____

Address: _____

Year in which Meritorious or Distinguished Service was awarded: _____

Additional awards/honors/commendations received:

EXPLANATION OF NOMINATION:

In the space below (use a second page if needed) describe the outstanding service which is the basis for this nomination. This is service which is long term, sustained and outstanding. The Hall of Fame Award is an award that recognizes service that is **of unusual and special benefit to the Federation.** In addition to the service to the Federation, Hall of Fame nominees are those who have performed service that is usually recognized by the National Headquarters. This might include serving on a National conference work group or furnishing research studies and reports or service as a member of a special study group. In other words, Hall of Fame performance goes beyond the Federation purview. Long term, outstanding service in a particular position or series of positions at the chapter level does not, by itself, qualify. Hall of Fame nominees are those who have **previously received either the Meritorious or Distinguished Service Award.** NOTE: Do not base your nomination on such things as: long membership in NARFE, Community Service items, long service as a Chapter Officer, and outstanding service in a Chapter position or biographical information such as service in the armed forces.

DUE DATE:



NOMINATION FORM DISTINGUISHED SERVICE AWARD

This nomination is submitted for a Distinguished Service Award for:

Active Federal Employee Retiree Spouse (Circle the appropriate category)

If he/she is currently serving as an officer, either appointed or elected – please specify all offices and dates:

Chapter # _____ Phone # _____ E-Mail _____

Address: _____

EXPLANATION OF NOMINATION:

In the space below (use a second page if needed) describe the Distinguished Service which is the basis for the nomination. This Distinguished Service Award recognizes exemplary service **to the Federation**. This is service which significantly adds to the goals of the Federation. Distinguished Service is of obvious benefit to the Federation and usually extends over a significant period of time (5 years). Distinguished Service is service which goes beyond the effective performance by an individual in a particular position (appointed or elected). Outstanding performance of the requirements of a particular position does not necessarily designate Distinguished Service. Since the chapters have full authority to recognize outstanding and distinguished service by their members, such service does not necessarily translate to a Distinguished Service Award related to the Federation. The Federation Distinguished Service Award relates to **significantly improving the effectiveness of the Federation**. **NOTE:** Do not base your nomination on such things as: long membership in NARFE, Community Service items, long service as a Chapter Officer, or biographical information such as service in the armed services.

DUE DATE:



NOMINATION FORM MERITORIOUS AWARD

This nomination is submitted for a Meritorious Award for:

Active Federal Employee Retiree Spouse (Circle the appropriate category)

If he/she is currently serving as an officer, either appointed or elected – please specify all offices and dates:

Chapter # _____ Phone # _____ E-Mail _____

Address: _____

EXPLANATION OF NOMINATION:

In the space below (use a second page if needed) describe the Special Act which is the basis for this nomination. The Special Act could be a special project, research study, or other service of benefit to the Federation. This Special Act must be of special significance **to the Federation.** Special or long standing **service to the Chapter is not pertinent to this award.** The Special Act is such that it is beyond the expectation for the **Chapter position** this person occupies. **NOTE:** Do not base your nomination on such things as: long membership in NARFE, Community Service items, long service as a Chapter Officer, or biographical information such as service in the armed services.

DUE DATE:



NOMINATION FORM COMMUNITY SERVICE AWARD

This nomination is submitted for a Community Service Award for:

Active Federal Employee Retiree Spouse (Circle the appropriate category)

If he/she is currently serving as an officer, either appointed or elected - please specify all offices and dates:

Chapter # _____ Phone # _____ E-Mail _____

Address: _____

Dates of Membership: _____

Time frame of Community Service: _____

Additional Awards/Honors/Commendations Received:

EXPLANATION OF NOMINATION:

In the space below (use a second page if needed) describe the Community Service which is the basis for this nomination. This Community Service Award recognizes a NARFE team/group or individual(s) for **volunteer service to the public within the year prior to the nomination due date**. Nominations must describe in detail how the nominee(s) contributed to outstanding community volunteer service based on involvement and leadership in community activities over a significant and sustained period of time. The impact of community service and/or additional honors and/or awards the nominee(s) has received for community service are factors. Special or long standing **service to the chapter is not pertinent to this award**. The community service is such that it is beyond the expectation for the chapter position this person occupies. **NOTE:** Do not base your nomination on such things as: long membership in NARFE, long service as a Chapter officer or biographical information such as service in the armed services.

AWARDS CRITERIA

Hall of Fame Award

This is service which is long term, sustained and outstanding. The Hall of Fame Award is an award that recognizes service that is of unusual and special benefit to the Federation. In addition to service to the Federation, Hall of Fame nominees are those who have performed service that is usually recognized by the National Headquarters. This might include serving on a National conference work group or furnishing research studies and reports or service as a member of a special study group. In other words, Hall of Fame performance goes beyond the Federation purview. Long term, outstanding service in a particular position or series of positions at the chapter level does not, by itself, qualify. Hall of Fame nominees are those who have previously received either the Meritorious or Distinguished Service Award.

Distinguished Service Award

The Distinguished Service Award recognizes exemplary service to the Federation. This is service which significantly adds to the goals of the Federation. Distinguished service is of obvious benefit to the Federation and usually extends over a significant period of time (5 years). Distinguished Service is service which goes beyond the effective performance by an individual in a particular position (appointed or elected). Outstanding performance of the requirements of a particular position does not necessarily designate Distinguished Service. Since the chapters have full authority to recognize outstanding and distinguished service by their members, such service does not necessarily translate to a Distinguished Service Award related to the Federation. The Federation Distinguished Service Award relates to significantly improving the effectiveness of the Federation.

Meritorious Service Award

The Meritorious Service Award recognizes a special activity by an individual which could be a project, study, or other service to the Federation. This activity would be of special significance for enhancing the mission of the Federation. While the activity could be an event of short duration, the enhancement of the Federation goals would be substantial. The special activity would be recognized as beyond the usual requirements of the position occupied by the incumbent of this position as the result of the person being appointed to a specific activity or the initiation and completion of an activity conceived by the individual as needed to improve operations of the Federation.

Community Service Award

The Community Service Award recognizes NARFE retiree teams, groups or individuals for volunteer service to the public. The nominee(s) must have contributed to outstanding community volunteer service based on involvement and leadership in community activities over a significant and sustained period of time. The impact of community service and additional honors and/or awards the nominee(s) has received for community service are factors. Special or long-standing service to the chapter is not pertinent to this award. The community service is such that it is beyond the expectation for the chapter position this person occupies.

Federation Hall of Fame Award

NOMINEE(S) NAME:				
Member of Colorado Chapter (Y/N)				
Chapter #				
Federal Employee (Active or Retired)				
Service Project within Colorado (Y/N)				
Beyond Normal Execution of Position (Y/N)				
Performed Service Recognized by National HQs (Y/N)				
Previously received Distinguished Service or Meritorious Service Award (Y/N)				
Apply Numeric Value (1 - 5) to items below				
Long term, sustained and Outstanding Service				
Unusual/Special Benefit to the Federation				
Additional Awards, Honors, Commendations				
Total Score *				

*Minimum numeric score of 8 required to qualify for the award.

Revised June 15, 2012

COLORADO FEDERATION OF CHAPTERS

GUIDELINE NO.13

SERGEANT-AT-ARMS

The Federation President shall appoint, subject to approval of the Executive Board, the position of Sergeant-at-Arms.

1. Equipment needed include: Federation banner, Flags, Charter, Plaques, and Timer. All of these items are maintained and stored by this office. These items are taken too all Federation Executive Board meetings and Conferences and put in their proper place. After the meetings, the items are taken and held at the residence of the Sergeant-at-Arms.
2. Responsibilities at meetings:
 - a. Places Federation Banner at speaker's podium, flags in proper place, and charter and plaques on appropriate table prior to meetings. Distribute printed material to members, as needed, during meeting.
 - b. Bring Hall of Fame plaque to all Federation Executive Board meetings and to conferences.
 - c. Leads the Pledge of Allegiance at all meetings.
 - d. This office works closely with the President and meeting chairperson to insure the meeting stays on schedule. This includes getting all attendees seated and prepared to start meeting on time.
 - e. When time allocations are given to participants, the Sergeant-at-Arms times the participant and gives appropriate warning when their time has expired.
 - f. When an issue calls for a vote, the Sergeant-at-Arms may call a member to assist in counting voting members desires, and give results to the President.
 - g. Whenever there seems to be disorder at a meeting, the Sergeant-at-Arms may call for "The House "To Be In Order".
 - h. In the absence of the Parliamentarian, the Sergeant-at-Arms assists the President in following Roberts Rule of Order for the meeting.
3. Federation Reimbursements: This office receives the same reimbursement as other Federation officers for mileage and registration.

It is important to remember that it is the responsibility of this office to keep order during the meetings, but to do it with humor so as to not hurt any member's feelings, particularly in delicate situations.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.14**

NARFE/FEEA PROGRAM CHAIR
(Federal Employees Education and Assistance Fund)

The purpose of the FEEA Coordinator is to provide leadership for the Federation in collection of contributions toward the NARFE/FEEA Natural Disaster fund and the NARFE/FEEA Scholarship fund and to encourage chapter participation in fund raising. The Federation President will appoint the NARFE/FEEA Coordinator.

1. The NARFE/FEEA Coordinator will:
 - a. Coordinate the fundraising endeavors for chapters to support the programs.
 - b. Provide training as necessary for chapter NARFE/FEEA chairs.
 - c. Submit all funds submitted by chapters to the National FEEA Office for the appropriate NARFE/FEEA account.
 - d. If not done by the Conference Committee, provides for a fund-raising activity at the Federation Conference.
 - e. Maintain appropriate records and provides reports on the contribution of funds.
 - f. Obtain volunteers when needed by the FEEA office, such as opening and sorting NARFE scholarship application envelopes. Also schedule volunteer help in times of unusually heavy contributions and application requests following a declared disaster.
 - g. The FEEA Coordinator will be cognizant of the FEEA Natural Disaster Fund that provides grants of up to \$500 per NARFE household to reimburse NARFE members for losses stemming from **declared** natural disasters. Applications may be downloaded from the FEEA website www.FEEA.org or requested via e-mail to feeahq@aol.com, toll free telephone 1-800-323-4140, or USPS mail to NARFE/FEEA Programs, 1641 Prince St., Alexandria, VA 22314.
 - h. The FEEA Coordinator will encourage federation and chapter members to make tax deductible donations via checks payable to the NARFE/FEEA Scholarship Fund or the NARFE/FEEA natural Disaster Fund, sent to NARFE/FEEA Programs, 1641 Prince St., Alexandria, VA 22314. Contributions may be charged to Visa, MasterCard or American Express credit cards at the FEEA website www.FEEA.org.
 - i. SEE **F-130**_NARFE's Disaster Fund. *Updated on 05/17*

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.15**

WEB MASTER

The incumbent shall serve as the Colorado NARFE Federation of Chapters Web Master. The Federation Web Page is maintained by the Web Master. The Web Page provides the members and any interested parties with up-to-date information such as contacts and history about The Federation, Chapters, Federation Board members, Federation Appointed members, Chapter Presidents, and Special Appointed Members of the Federation.

Basic Responsibilities of the Web Master: The incumbent shall:

1. Have a well-grounded knowledge of computer techniques for the implementation of the Web Page using the Operation System available.
2. Be knowledgeable about the use of the Internet and how to promote the Web Page on the various Internet Search Engines available.
3. Develop guidelines and procedures for the effective operation of the Federation Web Page.
4. Develop plans and contacts which can be used to enhance the performance and interest of the Web Page.
5. Consult with and advise the Federation President, Board members and Chapter Presidents on any innovative ideas and proposals that may be needed for better Web Page effectiveness.
6. Share data, information, and methods of operation and materials with other Federation Web Masters and staff.
7. Maintain a reference log and/or files to provide backup for data and articles used on the Web Page and track moneys spent for the maintenance of the Federation Domain Name and cost of operation of the Web Page charged by the Internet provider.
8. Provide training for personnel to operate and maintain the Federation Web Page should a need for replacement of Web Master Position become necessary
9. Perform other duties as assigned.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.16**

NARFE NET COORDINATOR

The incumbent shall serve as coordinator of the NARFE-Net computer electronic communications network to provide an effective information link between National Headquarters and other elements of the organization.

BASIC RESPONSIBILITIES:

Coordinate the effective distribution of official messages and other information utilizing e-mail, fax, and telephone communications to Federation officers and other field elements.

SPECIFIC DUTIES:

1. Develop guidelines and procedures for the effective operation of the Federation network.
2. Develop plans for the continuous improvements of the communications network, including the recruitment of volunteers to serve as Chapter Coordinators and all other levels.
3. Develop and maintain a computer database designed to disseminate Legislative Alerts, All member Bulletins and other priority messages to all members, including, but not limited to the CSFC Executive Board, Standing Committee Chairs, Chapter Coordinators and Special Assistants to the President in the most expeditious manner.
4. Consult with and advise the Federation President regarding innovative proposals and methods for improving the electronic telecommunications program.
5. Share data, information, and methods of operation and materials with other Federation Coordinators.
6. Maintain a reference log and/or message file to provide a tracking method for priority messages.
7. Perform other duties as assigned.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.17**

ALZHEIMER'S COORDINATOR

The purpose of the Alzheimer's Coordinator is to provide leadership for the Federation in collection of contributions toward NARFE's goal for Alzheimer's Research and to encourage chapter participation in local activities, as they relate to Alzheimer's Research. The Federation President will appoint the Alzheimer's Coordinator.

The Alzheimer's Coordinator will:

1. Coordinate the fundraising endeavors for national, regional and local support for Alzheimer's Research.
2. Provide training as necessary for Chapter Alzheimer's chairs.
3. Encourage Chapters to participate in the "Fund Raising for Local Projects."
4. Submit all funds submitted by Chapters under NARFE's fund drive for Alzheimer's Research to the Alzheimer's Association for the NARFE Alzheimer's fund.
5. Return all funds submitted for Alzheimer's local projects to the submitter.
6. Get involved with local Alzheimer's support groups.
7. If not done by the Conference Committee, provides for a fund-raising activity at the Federation Conference.
8. Recommend awards for Chapters and/or Chairs for Alzheimer's fund-raising efforts.
9. Maintain appropriate records and provide reports on the contribution of funds for Alzheimer's Research.
10. Obtain informational materials and fundraising ideas for sharing with Chapter.
11. Work with the Regional Alzheimer's Coordinator as requested.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.18**

BYLAWS/RESOLUTIONS COMMITTEE

The procedures for submitting and distribution of Bylaws resolutions prior to the Conference are set forth in the Bylaws, Article X, Section 1.

1. Send notice to all chapters and members to send in Resolutions forms to the bylaws committee 90 days before the opening of State Conference. No Resolution form submission can be accepted after the 90-day deadline.
2. Upon receipt of Resolutions/Bylaw changes, meet with the committee members and sort through all resolutions and decide what resolutions are Bylaws resolutions and what resolutions deal with changes other than Bylaw changes.
3. With committee members, sort through resolutions and make recommendations to adopt as amended or reject with rationale for each recommendation.
4. Send copies of Resolutions and proposed Bylaw Changes to all members sixty days prior to the opening of the conference to vote to accept or reject such changes.
5. At Conference make announcement of the voting results from the members of the accepted or rejected resolutions or Bylaw changes.
6. Send copies of accepted or rejected Bylaw results to Federation President and Secretary for updating the Bylaws booklet.

Attachment: Two Resolution Forms

1. PROPOSED BY-LAW/STANDING RULE AMENDMENT
2. PROPOSED RESOLUTION

Revised October 1, 2017



COLORADO FEDERATION OF CHAPTERS

PROPOSED BY-LAW/STANDING RULE AMENDMENT

DATE:

-
1. Title:
 2. Contact person and phone number: _____
Chapter number: _____ Chapter name: _____
 3. By-Law Article and Section affected (or Standing Rule number): _____
 4. State the Specific change proposed:
 5. Provide a comparison of what is in the bylaws (or standing rules) now, with the adjustments proposed, and how it will look if adopted:
 - 4a. Current Bylaws (or standing rules)

 - 4b. If Adopted:
 6. Reason the change should be adopted (limit to no more than three paragraphs):

7. Estimated Annual Cost: (Necessary for informed decisions)_____



COLORADO FEDERATION OF CHAPTERS
PROPOSED RESOLUTION

DATE:_____

1. **Subject:**

2. **Adopted by Chapter:**

Chapter Number: _____ Chapter Name: _____

3. **Federation Action:** ___ **Adopted** ___ **Adopted as Amended** ___ **Rejected**

Date of Meeting: _____

4. **WHEREAS:** (Provide the reason that the Conference should take the proposed action.
Limit to no more than three paragraphs)

5. **BE IT RESOLVED:** (Proposed action Conference should take.)

6. **Estimated Annual Cost:** (Necessary for informed decisions)

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.19

NOMINATING COMMITTEE

The Authority for this position is found in the Bylaws adopted at the 2017 Convention, Article IV, Section 6, A.

1. Nominating Committee: The Federation Nominating Committee, established for the full period between election year Conferences shall consist of at least three members. The chair shall be selected at the board meeting preceding the conference and shall select at least two members.
2. As soon as the Committee is formed the Committee shall then immediately start seeking nominees for each of the elected officer positions. It would be desirable to have at least two candidates for each elected office.
3. All members will be informed to contact the nomination committee if so desired to be considered for nomination of a position on the Federation Board. The committee shall nominate at least one candidate for each Federation office and shall report the nominees to all members not less than sixty (60) days prior to the opening of the Conference. This may be done through individual mailings or through the Federation newspaper.
4. The first meeting of the Committee occurs after the Board meeting or very soon after. The purpose of the meeting should be to discuss what needs to be done by the Committee. Succeeding meetings should be scheduled at least twice during the six months prior to the election. The final meeting should be held between ninety (90) and seventy (70) days prior to the Conference to formalize the list of nominees and submit notification to Chapter Presidents and all members not less than sixty (60) days prior to elections, and also, allow time for the return of ballots from the members.
5. The Nominating Committee Chairperson shall prepare a report of Committee activities for presentation at the Conference along with the results of the election.
6. Candidates for office must be informed of the duties and obligations of the office for which they will be nominated.

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.20**

CONFERENCE COORDINATOR

The Conference Coordinator shall be responsible for:

1. Obtaining Hotel proposals. Consult with members of the Conference Committee to determine which hotel best suits the needs for the Conference (locations, price for rooms, conference room rental, cost of (meals, tax, audio visual, parking, shuttle service, etc.) have Contract signed by Federation President but obtain new contract each time something changes.
2. Request letter from Federation President to authorize an advance of funds for start-up costs.
3. Select a Treasurer who will open a bank account with two signatures.
4. Form committees for the many phases organizing the Conference (advertising, credentials, door prizes, program, and registration, to name a few).
5. Set dates for committee meetings.
6. Oversee the correspondence sent from the Conference Committee for advertisements, exhibits, door prizes, donations, etc.
7. Mailing of an action letter to all Chapter Presidents, and the Federation Executive Committee with hotel information, date of Conference, boosters list(s), raffle tickets, due dates for registration making certain ample time is given Chapters to have discussions regarding business of the Conference and meetings prior to Conference. This information should be submitted at least two months prior to the Conference.
8. Check with hotel regarding accommodations on a regular schedule making certain needs for additional rooms for training sessions, etc., are accommodated. This will likely require a change in contract.
9. Contact Committees responsible for the arrangement of audio equipment, table arrangements, conference room, registration area, exhibit table, etc., to make certain arrangements are moving smoothly.

10. Near end of preparation time, make certain all committees have completed necessary arrangements and will be on hand the day prior to the beginning of Conference and early the first day of Conference to make certain all requirements are completed.
11. Arrange for persons who are Committee Chairpersons to be so identified during the Conference to assist with needs of attendees.
12. Conference Coordinator will participate in proceedings of the Conference as requested by the President. This could include a welcome address and occasional announcements as needed.
13. At least six months prior to the Conference, select or appoint a Conference Committee Chair who will be responsible for physical meeting arrangements. From that group or elsewhere, the Coordinator will appoint individuals as Sub-Committee Chairpersons, as deemed needed for a successful Conference, responsible for:
 - a. Program development
 - b. Sale of Alzheimer's and FEEA raffle tickets
 - c. Advertisements (local businesses)
 - d. Entertainment
 - e. Chapter displays in the program
 - f. Memorial service (optional)
 - g. Other
14. The Conference Coordinator should contact the immediate past Conference Coordinator for assistance in Conference planning, if needed.
15. See also Conference Guidelines book.

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.21**

PUBLIC RELATIONS OFFICER

The broad definition of Public Relations as stated in the NARFE Public Relations Handbook [FH-9 (05/08, page 3)] is: “For NARFE, public relations is important for gaining and maintaining public understanding and support. It is essential for informing elected official and for influencing legislation and policies that affect federal retirees. Public relations helps highlight the public service contributions being made by NARFE chapter and federations. Public relations helps to attract new members. Most importantly, public relations can help achieve the goal outlined in the preamble of NARFE’s constitution.”

The basic principle of the Public Relations activities is to keep the NARFE name in front of the public whenever possible and to promote a feeling of accomplishment for NARFE members as they pursue their individual accomplishments within our NARFE family and their community.

TASK

1. Official photographer of Federation events. The resulting photographs are distributed to interested parties including the Federation Newspaper Editor.
2. Organizing recruiting events in support of the National Office, e.g. the Colorado Federation provided membership recruiters at a three day “Blacks in Government” conference held in Denver.
3. Obtaining Proclamations and Letters of Welcome from our Governor and Mayor for insertion into the Federation Conference booklet. Please note that experience has shown that requests for these documents need to be made no more than a month prior to the booklet’s printing date and that repeated telephone reminders are needed to obtain the document requested.
4. Teaching Chapter Officers about the job of Public Relations. Class material is created including a list of all print media specific to a chapter area. This print media information is provided by Headquarters and needs to be updated periodically.
5. Creating Federation advertisements to be used in Regional and National Conference brochures.
6. Maintaining a “Colorado Federation Fact Sheet.” This one-page handout is a quick overview of the Federation aimed at the media or other interested parties. It states the current membership, amount of annuitant income coming into the State, and a brief paragraph about our National

Organization. Since money speaks volumes to our politicians there is great benefit in showing the millions of dollars from annuitants flowing into a Congressional District.

7. Providing information to the media about NARFE activities, and contributions to the community by NARFE members.

Revised July 1, 2009

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.22

Audit Committee

The purpose of the audit is to examine all financial records and the treasurer's reports for a given period to verify that all money received is accounted for.

Documents the audit committee may need:

- * Canceled checks and deposit slips
- * All bank statements from all accounts
- * Treasurer's checkbook(s) showing all receipts and expenditures
- * Treasurer's ledger showing itemized expenses and balance on hand
- * Itemized statements of bills paid including vouchers
- * Financial statements as presented at meetings, minutes showing authorization
- * Treasurer's annual financial report

The audit committee may examine:

- * Checks: checks should be in numerical order in the check book with no missing numbers. Any check(s) marked "VOID" should be listed.
- * Canceled checks: verify that all checks match with bills paid.
- * Bank statements: determine that all statements have been reconciled
- * Receipts: determine that receipts for funds match deposits as itemized on bank statements and on the organization's financial statements
- * Annual financial report: be certain that the beginning and the final balance on the report equal the beginning and final balance in the check book for the given period and that balance in the account(s) on the date of the audit is identical to the balance shown by the treasurer

Reporting:

- * The chairman may give an oral report from the floor or a written report may be read following the treasurer's report
- * Treasurer's annual report may be certified "Examined and found correct" with the signature(s) and date
- * Action is taken on the auditor's report immediately following the treasurer's report

Helpful Hints:

- * The audit committee is appointed early in the term. Treasurer is NOT a member.
- * An annual audit should be made. The president or membership may request an audit at other times
- * Auditing the books before a new treasurer assumes office relieves the treasurer of all financial responsibilities for the period covered by the report except where fraud exists.
- * A newly elected treasurer should not accept the treasurer's books without a certified audit.
- * All audit reports should be written and placed in Treasurer's and President's file.

Revised July 1, 2009

Audit Program for NARFE Chapters

Audit objective: To determine the accuracy and reliability of financial reports and records

Minimum Audit

1. Review end of financial year report for:
 - a. Mathematical accuracy
 - b. Adequate support using check register and depository statements for bank, savings account and Certificate of Deposits
2. Verify all items on treasurer's bank reconciliation as of end of financial year
3. Report at Executive Board and general monthly meeting (oral or written)

Expanded (Optional) Audit

Note: Sample testing is acceptable unless problems are indicated.

Depending on the severity, expand the examination as necessary and consider consulting the Chapter Executive Committee and the federation auditor.

1. Review end of financial year report for:
 - a. Mathematical accuracy
 - b. Accuracy of carry-forward balances
 - c. Adequate support using check register and depository statements for bank, savings account and Certificate of Deposits
2. Review bank reconciliations for accuracy and trace outstanding items (deposits and checks) to subsequent bank statements
3. Check mathematical accuracy of ledger and/or check register
4. Check the ledger and/or check register entries for supporting detail, e.g., deposit slips and checks
5. Scan checks for appropriate signature(s)
6. Compare revenue and expense entries in ledger and/or check register to supporting documentation
7. Compare financial report items to budget
8. Report at Executive Board and general monthly meeting (oral or written)

In addition to determining the accuracy and reliability of financial reports and records, chapter auditors should review internal controls and records for proper usage of chapter member's dues.

1. Chapter member dues and recruiting fees are for the purpose of operating the chapter.
 - a. Chapter operating expenses.
 - b. Member recruitment and retention.
 - c. Newspapers.
 - d. Funding members for training, attending State and National Conferences.
2. Chapter dues cannot be used for 501 (c-3) charitable contributions.
 - a. Alzheimer's contribution including Conference raffle tickets.
 - b. NARFE/FEEA contributions including Conference raffle tickets.
3. Chapter dues cannot be used for:
 - a. NARFE-PAC (PAC funds are subject to Federal Election Commission (FED) Laws).
 - b. Supporting a member's campaign for an elected office

4. Budgeted or proposed charitable contributions should be noted to show how the contributions will be funded, i.e.,
 - a. Ways and Means
 - b. Yard sales, etc.

Revised July 1, 2009

Check List 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 counter signed? Yes No

If yes, names of individuals authorized to counter sign checks:

1. _____ 2. _____

Note: 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. Has per capita dues been remitted promptly to the Federation Treasurer. Yes No. If not, what action should be taken by the chapter to insure 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 can be any two members of the chapter with exception of the President, Vice President's, Secretary/Treasurer or Treasurer who should provide all necessary records and any assistance that should be required to conduct the audit. Revised July 1, 2009

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.23

Pre-Retirement Seminar Coordinator (For recruiting purposes)

1. Obtain info from the Denver Federal Executive Board or other Pre-retirement sponsors who sponsor pre-retirement seminars for all agency employees.
2. Notify Chapters of these seminars and ask for volunteers to assist.
3. Order packets from national in time for the seminars
4. Set up table-top display and handouts.
5. Available to answer questions during breaks and lunch
6. Give volunteers necessary paperwork (evaluation and mileage claim) see page 17.
7. Vigilant to other agencies sponsoring or requesting PRS and contacting them to see if they allow NARFE to attend
8. When other agencies do have PRS, offer packets from National, ask them if they would like a NARFE rep to speak a few minutes and advise them we have a video or slide presentation.
9. Find a substitute speaker when the scheduled NARFE speaker is unable to attend.

Revised July 1, 2009

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.24**

FEDERATION NEWSPAPER EDITOR

The purpose of the Federation Newspaper Editor is to provide information on matters of interest to the members of the chapters of the Colorado Federation. The Federation President will appoint the Editor, and such staff as may be necessary.

1. The Editor will:
 - a. In conjunction with the Federation President, establish publications dates, solicit news, coordinate with the federation officials, and support Federation programs and functions.
 - b. Be responsible for determining appropriateness of news articles and for performing the general management of day-to-day activities of the newspaper.
 - i. Should include all Federation announcements.
 - ii. Should be neat and orderly in appearance, making members want to read it.
 - iii. Should include a mix of social news, business news (awards; membership; state, local and federal legislation events; Alzheimer's and NARFE-PAC), and national NARFE news.
 - c. Assemble, edit news articles, and publish the Federation Newspaper. The Newspaper will not be sent to all members through NES, but will be mailed to each member and also posted on the Colorado Federation web site.
 - d. The responsibility of the Editor is to edit news articles and materials submitted to him or her for publication. Any dispute between the Editor and submitter about what to include or be eliminated, if not resolved, must be forwarded to the Federation President for a decision.
 - e. All Executive Board members will be sent a request in advance to submit any articles that they may wish to have published.
2. See attached contract next

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.25**

SERVICE OFFICER COMMITTEE

The purpose of the Service Officer Committee is to assist the chapters in maintaining strong responsive service programs.

1. The Service Officer Committee is divided into two regions, Eastern Slope and the Western slope, to accommodate surrounding chapters.
2. The Service Officers will:
 - a. Encourage the chapter presidents to appoint and support service officers.
 - b. Assist the chapter service officers and the Service Centers in maintaining complete and current files of reference material.
 - c. Become familiar with the *Service Officer Guide*, FH-10, available from the National Headquarters supply section (see Form F-18, *Requisition for Printed Supplies*);
 - d. Provide training as needed and as resources permit.
 - e. Be prepared to brief and counsel the Federation officials on all service program matters.
 - f. Be prepared to report on service program matters as required by the Federation President and prepare articles of interest for the Federation Newspaper.
 - g. Maintain a good knowledge of all OPM benefits and programs.
 - h. Be prepared to refer chapter service officers to expert and authoritative advice on the programs of other agencies, such as Social Security, Medicare and Veterans Benefits.
 - i. Become knowledgeable about retirement and other member matters, such as:
 - (1) Procedures governing delivery of annuity checks;
 - (2) Life insurance and health benefits;
 - (3) Survivor benefits;
 - (4) Change of beneficiary procedures;

- (5) Death benefits;
- (6) State and federal income taxes;
- (7) Social Security requirements;
- (8) Helps members prepare reports and forms associated with such topics.

Service officers should also study benefits-related articles in *NARFE* magazine and *Quarterly News*.

Revised July 1, 2009

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO.26

FEDERATION HISTORIAN

The purpose of the Historian is to maintain the historical records of the Federation.

1. The Federation President will appoint the Historian.
2. The Historian will:
 - a) Be the custodian of all Federation historical records.
 - b) Ensure that such records are maintained in a secure location.
 - c) Identify and recommend to Executive Board records of historical value.
 - d) Display particular historical records at Conferences for information.
 - e) From time to time make reports to the Executive Board on matter relating to historical records.
 - f) Maintain a reference library of historic materials, records, and pictures for use by officers and members of the Federation.

The Federation Historian will store the records of closed chapters for a period of five (5) years, after which time if the chapter has not reactivated, the records will be destroyed provided that all remaining funds, no matter where being kept for safe keeping, have been properly distributed.

CHAPTER HISTORY GUIDE

1. Select a team of three and let them have access to all minutes, scrap books, and other pertinent material of the chapter.
2. Locate your Charter; noting issued date, number given to the Chapter, signed by whom, and names of the Charter members.
3. List chapter locations, meeting date, and time of day.
4. List officers and appointed officers for each year. Also, note when they were elected and installed and by whom.
5. Note when and where the National Conference was held and who your Chapter delegates were or who to vote your proxy. Mention who were elected. List the NARFE National President and any other pertinent business which transpired.

6. Note location and date our Colorado Federation Conferences was held and who were elected as delegates and alternates. Mention who were elected Federation officers, and what pertinent business transpired at the Conference.
7. Look for special guest who attended your chapter meetings, programs given, and members honored for services rendered.
8. Note special Anniversaries' (50th, etc.) of members, 100th birthday, etc., and when new members joined your chapter.
9. List any special concerns of the Chapter, such as legislative issues which would reduce or harm annuities or affect our COLA, etc.
10. Give any special events of the chapter, such as hosting the Colorado Federation Conference, trips, or special dinners/meetings of the chapter.

Revised July 1, 2009

COLORADO FEDERATION OF CHAPTERS GUIDELINE NO. 27

CHAPTER CLOSURE POLICY AND PROCEDURES

This Policy and Procedures statement for closing Chapters of the Colorado Federation of NARFE Chapters will be effective on the date of approval by the Federation President. It's the policy of the Federation to preserve Chapters and close then only as a last resort.

When a Chapter is in a state of uncertainty about remaining active or closing, for whatever reason, the Chapter President will contact the Federation President to discuss in depth the status of the Chapter and to agree upon potential solutions for Chapter direction.

The Chapter President will immediately alert all Chapter members explaining the situation causing Chapter uncertainty, i.e., lack of Chapter officers or lack of funds to support minimum Chapter activities, etc. The message will also request a positive or negative response from all members regarding Chapter closure with an invitation to help resolve the problem such as volunteering as a Chapter officer.

A. OPTIONS

If the decision is for Chapter closure, options must be explained to the Chapter members to retain their NARFE membership. The options are the following:

- 1) Current Chapter members must associate with a Chapter of their choice.
- 2) All Chapter members need not transfer to the same active Chapter.
- 3) Current members classified as Members-at-large may retain that membership status and need not join a Chapter.
- 4) Members who have a special membership class such as Honorary Life Member shall retain that membership class upon chapter transfer.
- 5) Those members choosing not to select an active Chapter will be assigned to the National Chapter listing code 0000, by the Federation President.
- 6) The current officers of the closing Chapter, especially the President, Treasurer, and Secretary, must remain in their position until final closure to assure Chapter business is legally completed.
- 7) After the closing chapter members have received all the information as to the availability of other chapters' meetings times, dues and locations, interested chapters may address the closing chapter members to expound their particular chapter.

- 8) When the closing chapter members decide to join another chapter, their dues at their anniversary date will be charged the same amount as those to the receiving chapter.

B. DISPOSITION OF PHYSICAL RESOURCES

- 1) If all members of the closing Chapter choose to affiliate with one Chapter, all remaining funds with the closing Chapter will be transferred to the receiving Chapter if such be their choice.
- 2) When more than one Chapter is involved in receiving members from the closing Chapter, funds will be divided among the receiving Chapters in proportion to the percentage of members received.
- 3) No funds will be transferred to NARFE supported charities or programs, or the NARFE-PAC.
- 4) The disposition of Chapter owned property other than funds, such as furniture, recording devices, projectors, gavels, banners, sound systems, flags, file cabinets, etc. should be discussed among the closing chapter members and a decision made as to disposition.
- 5) Funds could be transferred to the Federation Treasury to be used for membership activities.
- 6) Financial records of the closing Chapter will be audited after all authorized expenditures have been completed. The auditor(s) may be a non-NARFE firm specializing in financial record auditing or by the Federation audit team. Audit by closing Chapter member(s) will not be accepted. Results of the audit will be submitted to the Federation President for approval, then filed with the Chapter financial records. Final financial records, consisting of the past five years records, will be submitted to the Federation Historian.
- 7) Documents such as special meeting minutes, historical listings of Chapter officers, awards to Chapter members, special project reports and selected reports of the Chapter membership will be submitted to the Federation Historian. In all cases, if the closing Chapter has routinely presented records to the Federation Historian, there is no need for duplication.
- 8) The closing Chapter Charter will be sent to National Headquarters. If the Charter has been misplaced and cannot be found, communication to the National Office regarding the incident is necessary and will be recognized.

C. CLOSURE

When all the above has been completed and the Federation President has been informed in writing by the Chapter President, the Federation President will inform National Headquarters recommending the chapter be officially closed. When notification from National of the official closing is received by the Federation President, it will then be filed with the Federation Historian and Secretary.

National Policy #310 CLOSING A CHAPTER – Financial Disbursements

Financial obligations of a closing chapter should be paid as they come due. The funds the chapter votes to disburse to a chapter with which they may be merging, or to chapters receiving members being reassigned must be completed before the chapter closes. Funds should be retained to pay any obligation known to be due, but payable later. Any remaining funds in the chapter treasury should be sent to the Federation Treasurer.

National Policy #509 CLOSING A CHAPTER – Zip Code Reassignment

A chapter will be closed or merged with another chapter by National Headquarters solely on the federation president's recommendation, and only after the federation president has taken all steps to revive it, and only after consulting with any remaining officers of the chapter being closed. The charter shall be sent to the National Headquarters Federation & Chapter Services section. The federation president must reassign the chapter's ZIP codes to another chapter, or chapters, on Form F-46, which should be sent to Federation & Chapter Services. The federation president must also submit a list indicating to which chapter(s) each member is being transferred.

SEE Chapter and Federation Officers Manual F-10 (09/16) for further detailed information. ALSO SEE REVISED INTERIM PROCEDURES (10-16)

Amended October 1, 2017

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.28**

BALLOT VOTING

THIS SECTION WILL BECOME THE PROCEDURES FOR VOTING FOR ALL MEMBERS OF THE FEDERATION ON ELECTIONS AND RESOLUTIONS

Executive Committee Members:

Approval and implementation of our Federation bylaws including one member one vote is down the road, but here is a link to a reasonably priced online voting service. For those members that don't use the internet, we would provide them with a ballot based on their request. This might head off some questions during consideration of the revised bylaws at the Conference.

<https://app.electionbuddy.com>

The procedures for Ballot Voting will be in accordance with Article VI, Section 3.

**COLORADO FEDERATION OF CHAPTERS
GUIDELINE NO.29**

CONGRESSIONAL DISTRICT LEADER

March 19, 2020

It is imperative that every Congressional District have one NARFE Congressional District Leader (CDL), even if several NARFE chapters are located therein. The CDL shall be appointed by the Federation Vice President Legislation or by recommendation of the Federation President. The CDL is expected to be the key NARFE spokesperson who presents NARFE's position to the Representative and their staff in that congressional district. The CDL will coordinate legislative efforts among the NARFE chapters within the Congressional District. The CDL term of office is two years starting January 1st of the new Congress (i.e., January 1 of the odd numbered years).

A CDL for every Congressional District must be identified and begin working as soon after the election as possible. When a new Representative is elected, it is vital that the appointed CDL pay a visit to the local office and educate the Member and his/her staff about NARFE and NARFE issues by providing position papers. The CDL needs to routinely visit the local office and become well-known to the staff and to the extent possible, the Member. The CDL will be compensated for expenses related to legislative efforts, such as mileage, postage and supplies authorized by the Vice President Legislation.

Qualifications:

Must be a registered voter and must reside in the respective Congressional District.

Must represent NARFE in a professional manner and dress should be casual business attire (no shorts, tank tops, sandals, etc.).

Must be familiar with current legislative issues.

Must be familiar with the NARFE organization.

Must be familiar with all chapters located in the Congressional District

Should have access to email and the internet, and be familiar with the NARFE website, and Legislative Action Center.

Duties and Responsibilities:

Will work under the supervision and guidance of the Vice President Legislation but will primarily schedule own activities as the need arises.

Become well-known in your Congressional District with the Representative and his/her staff. The intent is that the CDL become so well-known that they are recognized by the Member, or at least the staff, on a first name basis.

Attend public events where the Representative is speaking.

Wear NARFE badge or logo apparel items at all events.

Attend NARFE-PAC sponsored fundraiser functions.

Coordinate efforts with all chapters in the Congressional District to support Legislative Alerts such as letter writing, email links to prepared letters, phone calls and visits to the Representative's office. Ensure personal contact with the local office staff to make them aware of action requested by the Alert.

Schedule at least one annual meeting during August with the Representative using the following process:

Make a written appointment with the scheduler and follow-up with a phone call.

Plan the meeting carefully. Have one spokesperson and stay on message. Realize that the Member is very busy and be flexible when scheduling a meeting.

Be prompt: Be punctual and patient. Thank the Member and/or the staff for taking the time to meet with your group. Get a photograph at the end of the meeting.

Be prepared: Provide information about NARFE and the issues. Provide the number of federal annuitants and employees living in the Congressional District.

Be responsive: Have a single spokesman, but the entire group should participate and prepare for questions. Uniting and coordinating members into a group who can stay on point and speak on the subject is crucial. A group should be no more than five individuals.

Send a Thank You letter.

Prepare a Summary report of the meeting, attendees and the results of your visit (and a picture of your group) to the NARFE Legislative Department with a copy to the Vice President Legislation.

Resources:

NARFE website, www.narfe.org

SEE - FH-7 NARFE Federation Legislative Chair, Congressional District Leader and Senatorial Leader Guide 03/19

Issues, Position Papers, Talking Points, Fact Sheets

Sample Congressional Delegation Letter

Weekly Hot Lines

Congressional Testimony

NARFE Letters to Congress

NARFE Biennial Legislative Conference

NARFE Legislative Staff – who can provide drafts of letters for your use, as necessary

NARFE Region and Federation Officers

Colorado Duties of the Congressional District Leader

1. Works under the general direction of the Colorado Federation Vice President Legislation to solicit and gauge the collective will of NARFE members in the congressional district.
2. The Colorado Federation Vice President Legislation will make appointments to the position for each 2-year session of Congress beginning January 1 of the first year and ending December 31 of the second year. Appointees are expected to serve the entire 2-year congressional session.
3. The Congressional District Leader (CDL) will reside and is a registered voter in the congressional district to which appointed as the CDL.
4. Arranges for periodic meetings with the Representative and/or staff to advocate for NARFE issues and to gain the Representatives sponsorship or co-sponsorship of issues that NARFE supports.
5. Provides feedback from the Representative and/or staff to NARFE members within the district.
6. Attends NARFE-PAC events as determined by the Vice President Legislation.
7. Notifies NARFE members in the district of periodic meetings, town hall meetings or other events in which the Representative is participating. Encourages NARFE members to wear NARFE attire (baseball caps, golf shirts, etc.) when attending these events.
8. Attends the NARFE biennial Legislative Training Conference and other training specific to national legislation. The Colorado Federation will make every effort to fund, at least partially, attendance at these training opportunities.
9. Provides a follow-up report on congressional meetings and events to the Colorado Federation Vice President Legislation and the NARFE Legislative Department at advocacyinaction@narfe.org.
10. Reimbursement of travel expenses for round trips of 10 miles or more at the rate of \$.50 per mile may be made by filing an Expense Report with the Federation Treasurer.

Congressional District, Senate and State Legislative Leaders

Congressional District Leaders

Congressional District	NARFE Chapters	Number of AFEs and Retirees*	Number of Annuitants **	Number of NARFE Chapter/National Members***	House Member	Congressional District LEADERS (Chapter)	e-mail Address
One	Denver 81	44,332	5,853	301/278=579	Diana DeGette (D)	Gary Roll (81)	g4458roll@gmail.com
Two	Ft. Collins 256 Boulder 293 Loveland 821	30,484	7,065	433/467=900	Joseph Neguse (D)	Bob Carr (1040)	rcarrjr@gmail.com
Three	Grand Jct. 351	12,998	7,867	169/536=705	Scott Tipton (R)	Brad Pearson (351)	b.r.pearson@att.net
Four	Greeley 355 Longmont 820 La Junta 1054	24,440	5,470	176/246=422	Ken Buck (R)	Johnny Perdue(355) Jane Hutchins (1054)	johnnyperdue@comcast.net Jhutchins43@gmail.com
Five	Billie Love 2286	21,263	9,825	48/481=529	Doug Lamborn (R)	Ted Van Hintum (2286)	Ted.vanhintum@gmail.com
Six	Aurora 1072	16,056	7,099	261/280=541	Jason Crow (D)	Eileen Bond (1072)	eilbond@hotmail.com
Seven	Arvada 1040 Mory Lewis 1085	26,948	8,332	555/453=1008	Ed Perlmutter (D)	Beverly Agy(1040)	terrelandbeverly@comcast.net
TOTAL		176,521	51,511	1,943/2741=4684			

Senate Legislative Leaders-Michael Bennet (D) and Cory Gardner (R)

Federation President: Paula Simmons (Arvada Chapter #1040) paulazretired@yahoo.com (Bennet)
 Vice President for Legislation (National): Pat Mather (Mory Lewis Chapter 1085) pamather@comcast.net (Gardner)

State Legislative Leader

Federation Legislative Chair (State) Eileen Bond (Aurora #1072) eibond@hotmail.com

*Data Source: <http://www.eyeonwashington.com> September 2014.
 **Data Source: <http://www.narfe.org/legislation> , January 2019
 ***Data Source: NARFE Online Activities Module, October 2018. Includes National members.

Updated March 2020

**COLORADO FEDERATION OF NARFE
GUIDELINE NO.30**

LEGISLATIVE CONFERENCE

Strategic grassroots advocacy is seen as one of the most effective catalysts for change in Washington. Federal employees and retirees are tired of having their benefits threatened to pay for other priorities and are eager to learn how to defend what they've earned. Advocacy is NARFE's core mission and attending LEGcon(YEAR) is the opportunity for NARFE members to learn the most effective ways to connect with their members of Congress, organize at the grassroots level and affect change.

LEGcon(YEAR) culminates in a visit to Capitol Hill where attendees will put their training to the test in meetings with their legislators and congressional staff. The day on the Hill will conclude with a closing reception where attendees will have the opportunity to mingle with members of Congress and their staff, reconnect with NARFE members and share feedback on their Congressional meetings.

Participation in LEGcon(year) is open to all NARFE members interested in learning how to advocate for NARFE's legislative priorities and protect members of the federal community from seeing their earned pay and benefits cut. You'll leave Washington, DC, proud to be a member of the federal community, energized by training on advocacy best-practices by nationally recognized experts, able to think outside the box after enlightening breakout sessions and excited about the future of NARFE in your role as a trained and seasoned advocate.

Members that attend will:

- Learn more about NARFE's legislative agenda
- Improve their advocacy skills
- Attend meetings with members of Congress and advocate on their own behalf in the nation's capital

To accomplish this task, the following are guidelines to adhere to:

1. Have at least one member to be from and represent each Congressional District before any consideration of more than one. This will assure each House member from Colorado is contacted by a constituent from that District, and not all attending are from the same District.
2. Depending on the funds available in the yearly budget, make an all-out effort to have a minimum of 7 members attend the conference in order to meet all House members and Senators. The allocated amount should be reflected in the approved budget at the yearly board meeting. The maximum number sent in any given year will be 8 members without explicit approval of the Federation Executive Committee for additional attendees. In case there is more than one person requesting to attend from a given District, a member who has not previously attended LEGcon will normally have priority; however, the final selection will be made by the Federation Vice President Legislation and Federation President.
3. A notice inquiring about a desire to attend the Legislative Conference, with stipulations of duties and responsibilities if chosen, shall be generated to all in number 5 below before sending to

National members and Chapter Presidents for their members. A cutoff date to apply shall be stipulated. (See attached LEGcon19 materials as reference)

4. A letter shall then be sent to each applicant to ask why they should be selected, their qualifications, what they intend to get out of the conference, and any other question needed for the Executive Committee to be able to make the best selection. A response date shall be stipulated.
5. Priority selection of members who can attend shall be from the list of:
 - a. Federation Vice President Legislation
 - b. CDL's
 - c. Federation NARFE-PAC Chairs
 - d. Chapter Legislative Chairs
 - e. Other involved legislative member
6. Once a selection has been made by the Executive Committee, the Federation President will notify those selected to assure each will register for the conference with NARFE. A thank you letter shall be sent to those not selected.
7. With the guidance of the Federation Vice President Legislation, attendees will coordinate and fulfill their responsibilities as a NARFE leader by spearheading meeting requests with their assigned Congressional Office and engaging with conference attendees. (see attached letter)
8. If more than one member is visiting a Congressional Office, decide before each meeting with that Congressional District who will be the main speaker at that scheduled meeting. Generally, it should be a constituent from that District.
9. A coordinated one page report from the perspective members attending the conference will be sent to the Federation Vice President Legislation and a copy to the newspaper editor for inclusion in the federation's next newspaper issue.

Approved March 25, 2019

**COLORADO FEDERATION OF NARFE
GUIDELINE NO.31**

CONFERENCE AUDIT

I Audit Committee:

- A. The Conference Host Committee Chair shall appoint an Audit Committee of at least two members.
- B. At the conclusion of the conference this committee is responsible for auditing the records of the Conference Treasurer.
- C. The Audit should cover, in detail, all receipts and disbursements and after consultation with the Conference Host Committee Chair, include a recommendation for distribution of surplus funds.
- D. The financial audit should also compare the total costs of the conference with the net profit to determine if any changes are indicated to increase or decrease the profits
- E. Items to examine and question might include registration fees and the prices of program book advertisements and individual names on the booster lists. Have these been the same price for several years – and is it time to increase the price?
- F. If so, recommended changes should be included in the committee’s final report. Perhaps there are other methods or sources of income that need to be explored or that come to mind that have not been used before.
- G. This all becomes a part of the audit and final recommendations by the committee.
- H. The final report shall be forwarded to the Chair of the Conference Host Committee and a copy to the Federation President.

APPROVED MARCH 25, 2019