

**NATIONAL ACTIVE AND RETIRED FEDERAL EMPLOYEES ASSOCIATION  
ARIZONA FEDERATION OF CHAPTERS**



**GENERAL GUIDELINES  
OF THE FEDERATION EXECUTIVE BOARD**

**Introduction.** The Bylaws of the Arizona Federation of Chapters, herein referred to as Federation, establish and describe the Federation Executive Board, its members, and its duties, responsibilities, and authority. The Bylaws also describe the duties, responsibilities, and authority of the elected and appointed officers and committees. Additional information concerning the duties of the elected officers is provided in the NARFE Chapter and Federation Officers Manual (Form F-18). These general guidelines are meant to supplement and expand upon the Federation Bylaws and the NARFE Chapter and Federation Officers Manual. These general guidelines are intended to be advisory in nature, and in many cases, are subject to the pleasure of the Federation President.

**Purpose:** The purpose of the Executive Board is to carry out the directions of the Arizona Federation and attend to necessary business which shall occur between conventions.

1. The Executive Board shall meet at least three times each year. The meetings will be held in January or February, in connection with the Federation Convention or Off-Year Training Meeting, and in September or October. The exact times and dates will be decided by the President.
2. Board meetings will be conducted with no more formality than is necessary to maintain order and conduct business at hand.
  - a. There will be an agenda for Executive Board meetings which will be sent to Board members and appointed officers at least ten (10) calendar days prior to the meeting date.
  - b. Only one person will speak at a time, but members are not required to obtain the floor before making motions or speaking. Motions must be seconded before any discussion is allowed. There will be no limit to the number of times a member can speak on a question. Informal discussion of a subject is permitted while no motion is pending.
  - c. Comments may be ruled out of order when not pertaining to the matter under discussion. The Presiding Officer may cut off debate on a matter in order to ensure that all items on the agenda are adequately covered.
  - d. When a matter is on the floor, it will be pursued to a conclusion if time permits. If not, it will be placed at the end of the agenda or deferred to the next regular meeting.
  - e. Only elected officers will be permitted to vote.
3. Under some circumstances, such as Special Awards, the Presiding Officer may declare a portion of the Board meeting “closed” to guests.

4. The use of e-mail will be used to the maximum extent possible to communicate among Federation Board and chapter officials. The telephone may be used when it is essential to discuss a particular matter with an official directly.
5. Expenses incurred by a Federation official must be submitted on the Officer's Expense Report, Form AF-1, to the Federation President accompanied by receipts. The Federation President will submit his or her expenses in the same manner to the Federation Vice President. Expense vouchers must be submitted not later than thirty (30) days after a planned event. More specific information on reimbursement is provided in the "Federation Guidelines Reimbursement of Expenses" which is located in the Arizona Federation Bylaw and Policy Manual.
6. The newly elected President and Treasurer will execute new signature cards as needed for access to the bank accounts.
7. All Federation elected officials are expected to attend each Executive Board meeting. Appointed Federation officials are encouraged, but not required, to attend each Board meeting unless a matter or issue related to their program area is on the agenda or they are personally invited to attend by the President.

### **GUIDELINE ONE: PRESIDENT**

**Purpose.** The purpose of the President is to act as the Chief Executive Officer of the Federation and to represent the Federation in dealings with other organizations and the public. The basic duties and responsibilities of the President are set forth in the Bylaws. This guideline is provided to assist the President in carrying out his or her responsibilities and to help eliminate errors and omissions. The guideline is not all inclusive, nor is it intended to be.

1. Arrange for all Executive Board meetings or assign responsibility for arrangement to another Federation official.
2. Prepare an agenda for each Executive Board meeting and at least ten calendar days before such meeting send a copy to each Federation Board member, including appointed members and to Region VII National Vice President.
3. Cause to be prepared a proposed budget with Treasurer, and obtain Executive Board approval at the January/February meeting.
4. Check with the Federation Secretary to ensure submission to National Headquarters of the following:
  - a. Resolutions for the National Convention
  - b. F-7A — State Federation Officer Roster
  - c. F-22 — State Federation Convention Report
5. In conjunction with the Executive Board, ensure that the Arizona Federation Newsletter is published bimonthly and appoint necessary staff to accomplish this task.

6. Within sixty (60) days after the Federation convention, check on the progress and ensure the completion of:
  - a. Bylaws — update based on resolutions passed at the Federation Convention, and sent to NARFE National Office for approval.
  - b. Summary of proceedings of the convention (minutes).
7. Make any necessary changes of zip code assignments to chapters.
8. Ensure that the Federation is represented at the bi-annual National Legislative Conference, as scheduled and conducted by the National Office.
9. Attend, or designate someone to attend, the National Convention as a Delegate-at-Large.
10. Review the Federation Convention plans with the Host City Chair and resolve any difficulties or problems. Ensure that the Convention Call has been made by the Convention Host Committee. Oversee the preparation of the Convention Program, and confer with the Convention Host Committee, so that the Convention Program can be printed accurately and in a timely manner.
11. Make recommendations to the National Office through the RVP when volunteers submit their names indicating an interest in serving on a National Convention committee.
12. Preside at a short Executive Board meeting immediately following the convention to announce committee appointments. If this is the end of his or her term, pass the gavel to the incoming Arizona Federation President at this time.
13. Evaluate, informally, the job performance of the Executive Board members and give recognition as appropriate.

## **GUIDELINE TWO: VICE PRESIDENT**

**Purpose.** The purpose of the Vice President is to act as backup to the President and to carry out specific assigned tasks. The basic duties for the Vice President are set forth in the Bylaws. This guideline is provided to assist the Vice President in carrying out his or her responsibilities and to help eliminate errors and omissions. The guideline is not all-inclusive, nor is it intended to be.

1. The Vice President will serve as President in the absence of the President.
2. The Vice President will accomplish all duties required by the Federation Bylaws, Executive Board Policy and Guidelines and other duties as assigned by the President.

## **GUIDELINE THREE: SECRETARY**

**Purpose.** The purpose of the Secretary is to provide continuity to Federation activities through the recording, distribution, filing of minutes and reports of the Arizona Federation Convention, Executive

Board meetings, and the exchange of correspondence. The basic duties for the Secretary are set forth in the Bylaws. This guideline is provided to assist the Secretary in carrying out their responsibilities and to help eliminate errors and omissions. The guideline is not all-inclusive, nor is it intended to be.

- 1.** All resolutions passed by the Delegates at a State Convention 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 as soon as possible after the State Convention. This is especially important in the even numbered years when the National Convention convenes.
- 2.** Complete and forward/transmit to the National Office Form F-22 (State Federation Convention Report) within 30 days of the completion of the Convention.
- 3.** As soon as possible after State Convention, send/transmit Form F-7A (State Federation Officer Roster) to NARFE Headquarters with any newly elected or appointed officers. Complete the Form to the extent possible, and resubmit any time there is a change in officers/appointees.
- 4.** As soon as possible following the close of the Convention, prepare a summary of the Proceedings of Convention (Minutes) and distribute to members of the Executive Board, including outgoing members, and Chapter Presidents.
- 5.** Prior to August 1 of each year of a Convention, update the Bylaws based on any Resolutions passed at the Convention. An amended copy of the Bylaws, as appropriate, will be sent to National for approval and provided to members of the Executive Board and Chapter Presidents.
- 6.** Order name badges for new officers, including appointed officials.
- 7.** Prepare the “DEADLINES FOR CONVENTION INFORMATION” for the Federation Convention and mail/transmit to Chapter Presidents and Executive Board members. Instructions will be included for all necessary actions to be taken prior to the Convention.
- 8.** When the Secretary receives a Form F-7 from a chapter showing officer changes, update the Federation and Chapter Roster of Officers and prepare any changes for distribution to members of the Executive Board and Chapter Presidents.
- 9.** Prepare a Federation and Chapter Roster of Officers booklet containing the names, addresses, telephone numbers, and e-mail addresses, if provided, of each chapter official, including appointed officials.
- 10.** Upon receipt of the Resolutions, in the proper format, assign a number to each one. Resolutions will be copied or printed. One copy of each resolution will be mailed/transmitted to each member of the Executive Board, Chapter Presidents, each member of the Resolution Committee, and Parliamentarian.
- 11.** The Federation Secretary will maintain federation historical records or ensure that they are properly stored in a safe and secure location, in the absence of a Federation Historian.

**12.** The Federation Secretary will obtain letterhead stationery and franked envelopes for the Federation; usually a ream of letterhead paper and a box of 500 envelopes should be sufficient. However, other amounts may be obtained if it would be more cost effective.

## **GUIDELINE FOUR: TREASURER**

**Purpose.** The purpose 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 the Bylaws. This guideline is provided to assist the Treasurer in carrying out his or her responsibilities and to help eliminate errors and omissions. The guideline is not all-inclusive, nor is it intended to be.

### **1. FUND CONTROLS AND REPORTING:**

a. Establish bank account in a Federally Insured Financial Institution for the Arizona Federation of Chapters. Monthly, reconcile bank statement to checkbook.

b. Record receipts and expenses of the Federation. Prepare reports comparing actual income and expenses by account title with the approved budget. Reports will be published in the Federation newsletter, presented to the Executive Board meetings, and presented at the Federation Convention. The Fiscal year is January 1 through December 31 (Calendar Year basis).

### **2. INTERNAL CONTROL-OFFICER'S EXPENSE REPORT SUBMISSION:**

a. All Officer's Expense Reports, (AF-1), with supporting documentation attached, are sent to the President for approval and then forwarded to the Treasurer for payment. The Treasurer reviews all such Reports for accuracy and for compliance with current Bylaws and Policy Guidelines. All payments are recorded by check number, payee, dollar amount, and allocated to expense categories in accordance with the approved budget.

### **3. ADMINISTRATIVE RESPONSIBILITIES:**

a. Records and Maintenance:

(1) Maintain file folders on incoming and outgoing correspondence on a calendar 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.

(2) Participation in Federation Administration

(a) Assist the President in the preparation of the Federation budget for the ensuing calendar year.

(b) Maintain close communication with the Federation Executive Board concerning development of the budget vs. actual status.

b. Monthly, go online to NARFE web site to obtain the 10% Fund report of membership dues being rebated to the Federation.

c. In January, after receipt of December-ending membership figures (Membership Summary Report (M-110), send out chapter per capita dues certifications and assessments. The due date for payments will be January 31 each year.

d. In February, or upon notification by NARFE National Office, prepare and file the IRS 990 report, Return of Organization Exempt From Income Tax.

## **GUIDELINE FIVE: DISTRICT VICE PRESIDENT**

**Purpose.** The purpose of the District Vice President (DVP) is to represent the Federation in promoting the aims and objectives of the National Association, represent the chapters in their district, and to perform as members of the Executive Board. The guideline is not all-inclusive, nor is it intended to be.

1. District Vice Presidents represent the chapters in their respective districts in all matters except chapter policy making.
2. Each District Vice President should be alert to the interest and concerns of the chapters in the District and act as a channel of communication between the chapters and the Executive Board on these matters. The DVP is encouraged to contact the Executive Board for advice on the basic principles and goals for which they have concerns in their respective chapters.
3. Each District Vice President is required to attend Executive Board meetings and Federation conventions. Written reports of activities are required.
4. Copies of correspondence originated by District Vice Presidents relating to clarification of policy or giving instructions and relating to membership should be shared with the Executive Board.
5. Promptly after assuming office, the District Vice President will write each chapter in the district offering assistance and expressing the desire to schedule a contact at the chapter's convenience. DVPs should attend as many of their chapters' meetings as possible. The DVP can also use other means of media, to offer assistance and express a wish to schedule a chapter visit, at the convenience of the chapter.
6. Remind the chapters to complete the F-7 Report as soon as possible after chapter elections and chair responsibilities have been assigned. In addition, submit a revised F-7 whenever there are changes to the original submission.
7. Remind the chapters to complete their annual audits. For record purposes, the "Check List for the Audit of NARFE Chapter Funds (F-131)" should be completed. The chapter treasurer should communicate such completion to the DVP, no later than the 15th day of the second month following the end of the chapter's fiscal year.
8. Remind the chapters to complete the required IRS forms for non profit organizations. All NARFE Chapters must file IRS returns or risk revocation of tax-exempt status. Normally, chapters will file Form 990-N, Electronic Notice (e-Postcard) for tax exempt organizations, available on-line. The chapter's employer identification number (EIN) is required when filing the Form 990-N.

## **GUIDELINE SIX -- MEMBERSHIP**

**Purpose.** The purpose of the Membership Officer is to assist the chapters in developing and carrying out recruitment and retention programs. The Membership Officer will be an appointed member of the Executive Board.

1. The Membership Officer will:
  - a. Develop a plan that supports all National membership initiatives with incentives that could enhance these programs, where applicable, to be implemented by chapters in conjunction with the District Vice Presidents;
  - b. Establish a results oriented recognition system to reward chapters and/or individuals for outstanding efforts in membership recruitment and retention activities;
  - c. Assist chapter's executive board and membership chairs to develop a recruitment/retention plan that motivates members to gain and retain members;
  - d. Provide training as needed and as resources permit;
  - e. Make a report at the Federation Convention on the status and results of the Federation's recruitment and retention efforts.

## **GUIDELINE SEVEN -- FEDERAL LEGISLATION**

**Purpose.** The purpose of the Legislative Officer for 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 Arizona Congressional Delegation. The Federation Bylaws, outlines the basic duties of this position.

1. The Legislative Officer for Federation Legislation will:
  - a. Keep posted on Federal Legislation of interest to NARFE and senior citizens.
  - b. Maintain communication with the National Office's Legislative Staff.
  - c. Communicate with Senators and Representative by visit, telephone, letter or E-mail.
  - d. Utilize the Administrative Staff of legislators to keep current on legislation and to secure copies of pending bills.
  - e. Keep federation officers, and chapter officials up-to-date on legislation, Congressional actions and procedures.
2. The Legislative Officer:
  - a. May request chapter legislative officials to make congressional visits in order to establish close working relationships.
  - b. Makes a report of each Congressional visit to the Executive Board.
  - c. Should be prepared to answer questions, assist in training seminars and help chapters carry out an effective legislative program.

## **GUIDELINE EIGHT -- STATE LEGISLATION**

**Purpose.** The purpose of the Legislative Officer for State Legislation is to monitor the Arizona State legislative process, to alert the Federation to matters of interest, and to be the focal point of NARFE contacts with the Arizona Legislature.

1. The Legislative Officer for State Legislation will:
  - a. Keep posted on legislation of importance to NARFE members and senior citizens.
  - b. Maintain lines of communication with State Senators and State Representatives.
  - c. Become acquainted with legislative assistants.

- d. Make sure that he or she has a copy of the State Legislative Manual and receives State publications listed therein.
- e. When particularly urgent legislation of interest to NARFE is pending, consider contacting other members, within a reasonable distance from Phoenix, to visit legislators.
- f. When legislation is pending that is of particular interest to the Federation, notify the President to activate GEMS, if support is needed in a general floor vote.
- g. Keep the Federation President, Executive Board members, District Vice Presidents, chapters and others fully informed.
- h. Make visits to local offices of State Senators and State Representatives or request a chapter legislative official to make such visits.
- i. Make a report to the Executive Board after each visit.
- j. Answer questions, assist in seminars and help chapters establish and carry out an effective legislative program.

## **GUIDELINE NINE -- PUBLIC RELATIONS**

**Purpose.** The purpose of the Public Relations Officer is to advertise the organization and its objectives, goals, and accomplishments. The Public Relations Officer will respond to, and refute adverse articles printed in the media. Further, it will refute public statements that are critical, unfair, untrue and those which project an image that is detrimental to NARFE and its members.

1. The Public Relations Officer must work to combat the items listed above, and at the same time, project the work of NARFE in a manner that will attract public support.
2. The Public Relations Officer will:
  - a. Work with federation officials and the NARFE Public Relations Department to help carry out the programs of the chapters and the Federation.
  - b. Prepare formats to supplement the existing National and Federation guides. The purpose is to encourage chapters to:
    - (1) Provide publicity to improve and advance the image of NARFE for review by Executive Board that would:
      - (a) Encourage local media contacts by getting chapter news events into the local paper.
      - (b) Encourage chapter participation in public and social events as sponsors.
    - (2) Provide a program to be used to combat adverse publicity to Federal employees and retirees, such as:
      - (a) Preparation of rebuttal statements to news radio and television stations for signature of Federation President.
      - (b) Preparation of written answers to critical letters for signature of Federation President.
      - (c) Keeping close contact with the NARFE National Public Relations Director for information and assistance.
      - (d) Prepare press releases for signature of Federation President for Federation legislative activities.



3. The Public Relations Officer should encourage Federation Officials and Chapter Members to:
  - a. Report events of concern that appear in the local area newspapers to the Public Relations Officer and Federation President.
  - b. Assist chapters, as requested, in their effort to answer adverse publicity in the local papers.
  - c. Maintain close contact with the Public Relations Officer and request assistance when needed.

## **GUIDELINE TEN -- SERVICE OFFICER**

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

1. The Federation Service Officer 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. Provide training as needed and as resources permit.
  - d. Be prepared to brief and counsel the Federation officials on all service program mailers.
  - e. Prepare and oversee the Health Fairs activities throughout the State and provide a schedule of health fairs annually with incentives to encourage chapters to participate during open season at their community federal installations.
  - f. Be prepared to report on service program matters as required by the Federation President and prepare articles of interest for the Federation Newsletter.
  - g. Maintain a good knowledge of all OPM benefits and programs.
  - h. Be prepared to refer chapter service officers and Service Center personnel to expert and authoritative advice on the programs of other agencies, such as Social Security, Medicare and Veterans Benefits.
2. The Federation Service Officer will not attempt to provide legal advice. When a legal question is involved, counsel should be sought.

## **GUIDELINE ELEVEN – PARLIAMENTARIAN**

**Purpose.** The purpose of the Parliamentarian is to advise the Federation President and other officers, committees, and members, on matters of parliamentary procedures.

1. The Parliamentarian's role during the State Convention is purely an advisory and consultative one. Parliamentary law gives to the presiding officer alone, the power to rule on questions of order or to answer parliamentary inquiry.
2. The Parliamentarian will serve during the State Convention to assist with any question that may arise in interpreting Bylaws and rules. The Parliamentarian's duties extend beyond giving opinions to the presiding officer during the State Convention, and may include assisting in the planning and steering of business to be introduced prior to and during the business sessions of the convention. His/Her duties also may include assisting committee chairs in conducting business of the committees.

3. During the convention, the work of the Parliamentarian should be limited to giving advice to the presiding officer and, when requested, to any other member. It is also the duty of the Parliamentarian, as inconspicuously as possible, to call to the attention of the presiding officer, any error in the proceedings that may affect the substantive rights of any member or may otherwise do harm.
4. The Parliamentarian should be seated next to the presiding officer, in order to be convenient for consultation. The formal ruling by the presiding officer may follow the advice of the Parliamentarian or disregard it.
5. The Parliamentarian has the same duty as the presiding officer to maintain a position of impartiality.
6. The Parliamentarian serves in a pay status if he or she is not a member of the Federation and the Federation President will negotiate the fee for service with him or her. The same allowance for travel and subsistence that are provided for members of the Executive Board may be given to the Parliamentarian.

## **GUIDELINE TWELVE -- CONVENTION SITE COMMITTEE**

**Purpose.** The purpose of the Convention Site Committee (CSC) is to identify potential site locations for Federation conventions. The Committee is responsible for presenting choice sites for consideration by delegates at the convention. In the event that the Committee does not present sites for consideration by delegates at a convention the Executive Board will take such action as necessary.

1. Issue an invitation to chapters asking them to consider making a bid to host a convention (indicating the year).
2. Review the bids (sites) prior to the convention and during the Committee meeting. Make a decision on what bid the Committee will recommend to the delegates.
3. Prior to the convention evaluate sites for suitability, i.e., convenience for walking to areas of interest, parking, safety for the disabled and adequacy of rooms and space.
4. Be open with chapter representatives about the content of their proposal and evaluate each fairly.
5. Interview the chapter representative who will make the presentation at the convention to ensure all areas of interest are provided, e.g., dates, cost of rooms, amenities, availability of RV parking, room taxes, etc.
6. Evaluate the chapter's capability to successfully carry out the work required to conduct a convention.
7. Report the Committee's recommendations to the convention delegates.

## **GUIDELINE THIRTEEN -- AUDIT COMMITTEE**

**Purpose.** The purpose of the Audit Committee is to examine the correctness of the Federation's financial records. The Federation Bylaws do not provide the basic duties of this committee, however, there are National guides to provide the guidance necessary for carrying out an audit. The Chair of this Committee and each committee member should become thoroughly familiar with these guides.

1. The Chair will:
  - a. Ensure that each committee member has a copy of these guides and all data furnished by the Federation Treasurer.
  - b. Be fully informed and prepared to brief Federation officials on any resolution relating to fiscal matters of the Federation which are to be considered at the Federation convention.
  - c. Keep the Federation President informed as to the Committee's activities and recommendations.
  
2. The Committee members will:
  - a. Selectively examine and review all reports furnished by the Federation Treasurer including:
    - (1) The monthly Financial Reports
    - (2) Bank Statements
    - (3) Officer Expense Reports (AF-1)
    - (4) Ledgers and other financial records.
  - b. Basic audit procedures to be followed:
    - (1) The Fiscal Year report will be submitted each year to the Federation President prior to the Federation Convention/Off-Year Training Meeting.
    - (2) The report should include the Audit Committee's verification statement and suggestions and recommendations for consideration by the Executive Board.
    - (3) The requirements of the Federation Bylaws, and other applicable directives to the Treasurer should be checked to insure compliance.
    - (4) Reconcile bank statements with the books, or check the Treasurer's reconciliation.
    - (5) Test check the names entered on the books as the legal recipient of the check with the endorser of the check.
    - (6) As in (5) above, test check amounts of vouchers against checks issued.
    - (7) Test check receipt of monthly funds from National for field operations fund.
    - (8) Spot check chapter size against dues received from chapter.

## **GUIDELINE FOURTEEN -- NEWSLETTER EDITOR**

**Purpose.** The purpose of the Federation Newsletter Editor is to provide information on news of interest to the members of the chapters of the Arizona 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 Arizona Federation Newsletter within the guidelines established by the Federation Executive Board.
- c. Assemble, edit news articles, and publish the Federation Newsletter.
- d. The responsibility of the Editor is to edit new articles and materials submitted to him or her for publication. Any dispute between the Editor and submitter about what to include or eliminate, if not resolved, must be forwarded to the Federation President for a decision.

## **GUIDELINE FIFTEEN -- ALZHEIMER'S COORDINATOR**

**Purpose.** 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.

1. The Alzheimer's Coordinator will:
  - a. Chair and coordinate a State Alzheimer's Committee as needed.
  - b. Coordinate fund raising endeavors for national, regional and local support for Alzheimer's Research.
  - c. Provide training as necessary for chapter Alzheimer's coordinators
  - d. Encourage chapters to participate in the "Fund Raising for Local Projects."
  - e. Submit all funds submitted to him or her by chapters under NARFE's fund drive for Alzheimer's Research to the appropriate office.
  - f. Return all funds submitted to him or her for Alzheimer's local projects to the submitter.
  - g. Get involved with local Alzheimer's support groups.
  - h. Provide for a Federation Convention fund raising activity, if so requested by the Federation President.
  - i. Recommend awards for chapters for Alzheimer's funding raising efforts.
  - j. Maintain appropriate records and provide reports on the contribution of funds for Alzheimer's Research.
  - k. Obtain informational materials for sharing with chapters.

## **GUIDELINE SIXTEEN -- NARFE-PAC COORDINATOR**

**Purpose.** The purpose of the NARFE-PAC Coordinator is to provide leadership for the Federation in the solicitation of donations for NARFE-PAC throughout the State and to support NARFE's political arm within the Arizona Federation.

1. The NARFE-PAC Coordinator will:
  - a. Provide guidance and assistance to chapters on the solicitation of donations.
  - b. Encourage chapters to appoint a NARFE-PAC Coordinator. If possible, someone with Internet capability.
  - c. Advise chapters regarding the availability of NARFE-PAC materials (pins, contribution forms, NARFE-PAC posters, etc.) and how to order them.

- d. Provide training for chapter NARFE-PAC Coordinators, as needed.
- e. Prepare NARFE-PAC information for the Federation newsletter.
- f. Provide information to the Executive Board on NARFE-PAC activities, as requested.
- g. Staff for a NARFE-PAC table at the Federation Convention, if available.
- h. Inform Federation and Chapter officials as to contributions made or not made to Arizona Candidates according to quarterly NARFE-PAC reports from National.
- i. After consultation with affected Chapters, DVPs, the Federation Federal Legislative Officer, and the Federation President, determine in advance whether or not to support a NARFE-PAC donation to a candidate within Arizona's Congressional delegation (two Senators and nine Representatives). So advise the National Legislative Department, if a recommendation is requested.

## **GUIDELINE SEVENTEEN -- WEB MASTER**

**Purpose.** The purpose of the WEB Master is to establish and maintain the Federation WEB Site.

1. The WEB Master will:
  - a. Maintain the Federation WEB Site and necessary links.
  - b. Develop materials and information to be posted on the WEB Site.
  - c. Make recommendations to the Board on what should or should not be included.
  - d. Work with chapter officials in establishing a WEB Site.
  - e. From time to time make reports and recommendations to the Executive Board on use and any improvements needed.

## **GUIDELINE EIGHTEEN -- HISTORIAN**

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

1. The Historian will.
  - a. Be the custodian of all Federation historical record.
  - 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 conventions for information.
  - e. From time to time make reports to the Executive Board on matter relating to historical records.

**NOTE: Guidelines One through Five pertain to the Elected Officers of the Federation, as defined by the Federation Bylaws. Guidelines Six through Ten pertain to the five Appointed Officers identified and proscribed by the Federation Bylaws, who shall serve at the pleasure of the President. The remaining Guidelines pertain to appointed Officers, Committees, and Chairs, that may or may not be appointed by the President, as may be required to effectively conduct Federation business and conventions.**

## **GUIDELINE NINETEEN – CONGRESSIONAL DISTRICT LIAISON**

**Purpose.** The purpose of the Congressional District Liaison (CDL) is to be the key NARFE representative who presents NARFE's position to the Member of Congress (MC) and their staff representing that congressional district. Each CDL will coordinate legislative efforts among the NARFE chapters within their Congressional District.

The CDL term of office is two years starting January 1<sup>st</sup> of the new Congress (i.e., January 1 of the odd numbered years) and ending December 31<sup>st</sup> of the second year.

The CDL shall be appointed by the Federation President and/or by recommendation of the Federation Board.

The CDLs

### **1. Qualifications**

- a. Be a registered voter and reside in the respective Congressional District.
- b. Represent NARFE in a professional manner and dress should be casual business attire
- c. Be familiar with current legislative issues.
- d. Be familiar with other chapters located in the Congressional District.
- e. Have access to email and the internet and be familiar with the NARFE website, Legislative Action Center, and Protect America's Heartbeat.

### **2. Duties**

- a. Works under the general direction of the Arizona Federation National Legislative Chair (AZ FNLC) to solicit and gauge the collective will of NARFE members in the congressional district, but will primarily schedule own activities as the need arises.
- b. Become known in your Congressional District (CD) with the Member of Congress and/or his/her staff so as to be recognized by the Member, or at least the staff, on a first name basis.
- c. Attempt to schedule at least one annual meeting during a CD work period with the MC.
- d. Arrange for periodic meetings with the MC and/or staff to advocate for NARFE issues and to gain the MC's sponsorship or co-sponsorship of issues that NARFE supports.
- e. Attends, when possible, and notifies NARFE members in the CD of periodic meetings, town hall meetings and other events including NARFE-PAC events where the MC is speaking. One source of information of these events is to be provided to the CDL by the AZ FNLC.
- f. Wears and encourages NARFE members to wear NARFE badge or logo apparel items at all events.
- g. Provides feedback from the MC and/or staff to NARFE members within the district.
- h. Provide a follow-up report on congressional meetings and events to the Arizona Federation President, AZ FNLC, and the NARFE Legislative Department at [advocacyinaction@narfe.org](mailto:advocacyinaction@narfe.org). This report to include summary of the meeting, attendees, and if possible a photo.
- i. Attend, when possible, the NARFE annual Legislative Training Conference. The Arizona Federation will make every effort to fund, at least partially, attendance at this training opportunity.
- j. Reimbursement of travel expenses for round trips of 10 miles or more at the rate authorized in the Federation Guidelines Reimbursement of Expenses under Allowances I b Mileage may be made by submitting an Expense Report to the Federation President. Other expenses may be reimbursed with prior authorization from the Federation President.

