



# AFSA CHECKLIST FOR CHAPTERS



Following is a handy checklist of actions required, points to remember, and ideas for managing chapters. It was compiled from various sources including governing documents, field organizations, and council and committee members.

## **MEETINGS (Executive Council and General Membership):**

References: AFSA Bylaws (AFSAM 100-1), Policies and Procedures Manual (AFSA Manual 100-2), Code of Conduct, and Operations Manuals (AFSAMs 100-4 series)

Do all Executive Council members have copies of aforementioned governing references?

Does the Executive Council meet monthly and prior to Chapter General Membership Meetings?

Is an agenda prepared and distributed for all meetings (Exec Council and General Membership)?

Do all meetings begin with an Invocation, Pledge of Allegiance, and AFSA Preamble?

Are Minutes recorded for all meetings?

Are Minutes voted upon, accepted, and retained for all meetings?

Are minutes approved by the members or the Executive Council as appropriate?

Does the Chapter President schedule a courtesy call and visit with the host Commander and local CCM(s) upon changes of either AFSA officials or base officials? If there has been no change in either party, is there at least a semi-annual (every six months) courtesy call to maintain liaison effectiveness?

Does each member of the Executive Council report at the General Membership Meeting on their respective area of responsibility (i.e.: Legislation, Membership, Finances, Plans/Programs, AAC)? Are the Minutes and Treasurer Report approved by the General Membership?

Are the respective CCM(s), First Sergeants, PME Commandants invited to every General Membership Meeting? If in attendance, are they introduced and invited to speak on issues in their area of responsibility?

Is the Annual Calendar of Events disclosed to the General Membership at every meeting for upcoming plans and programs?

## **TRAINING:**

Are ALL members (elected, appointed, general membership) aware of their responsibilities and accountability?

Is Orientation and follow-up training of Executive Council members being conducted? By Whom, When, What subject matter?

Is Orientation and follow-up training being conducted for the general membership with emphasis on newly recruited members?

As a part of training, are copies of Chapter Standing Rules, the AFSA Preamble, Code of Conduct, and AFSA Bylaws available for the general membership?

## **QUARTERLY REPORTING:**

Are quarterly reports being prepared IAW AFSA guidelines (e.g.: proper format, required signatures, timeliness, etc)?

Is the Chapter Directory of Officers accurate at all times? Was a new Directory of Officers submitted with the 4<sup>th</sup> Quarter reports and dated in the current calendar year?

Did the Annual Audit contain signatures of those performing the Audit? When the Audit was submitted to AFSA Headquarters, did it also contain the Chapter President's signature and date or appropriate certification e-mail?

Was the coming FYs Annual Budget submitted with the 4<sup>th</sup> Quarter report? Did the budget contain the Chapter President's signature AND the date the General Membership approved the budget?

Was the Activity and Americanism Report submitted quarterly? Were all Americanism expenses fully explained? Did the report provide adequate information on projects and actions and contain the Chapter President's signature?

Will those items funded and listed on the Americanism Report withstand the IRS and or GAO test of tax exempt as a non-profit Association?

Was the Financial Report prepared by the Treasurer and signed by both the treasurer and the Chapter President? Was it approved by the General Membership prior to submission?

Does the chapter checking account have at least two signatures listed with the financial institution?

Are all checks over an established amount (per chapter standing rules) signed by both the Treasurer and President or Vice President?

Does the quarterly Activity and Americanism Report contain input from the Airmen Activity Coordinator?

#### **MISCELLANEOUS:**

Are Chapter Standing Rules approved annually by the General Membership?

Is there a Scholarship Committee? If so, is the program publicized chapter-wide as to eligibility, application procedures, etc?

If a scholarship program exists, does the Annual Budget reflect this?

Upon determination of scholarship awardees, are the scholarships presented at the General Membership with sponsors and family members present?

What are the established communications within the Chapter? Do they effectively make use of a Newsletter, Web site, Base Paper, local radio station public service announcements, etc?

Does the Chapter have a Historian? Is the program effectively retaining matters pertinent to the chapter and its activities in support of AFSA, the community, etc?

Does the chapter have a Membership Committee? Is it effectively pursuing membership growth thru new recruits and retention initiatives? Is the committee helping to achieve SKYHIGH and or HighFLIER recognition through training members how to recruit and retain?

Does a knowledgeable chapter representative brief at ALS, FTAC, NCO Academy, first sergeants meetings, chiefs group meetings, Top 3 meetings, et al?

Does the Chapter President/Vice President monitor chapter recruiting/retention efforts and results? Are the results reported at the monthly chapter membership meeting?

Does the chapter send a knowledgeable representative to various other meetings in the area to brand and gain exposure for AFSA (i.e.: VFW, American Legion, Base Advisory Council, etc)?

Are "fun" activities other than work details budgeted for and conducted to show member appreciation?

#### **MEMBERSHIP ROSTERS AND ANCILLARY ISSUES:**

Is the chapter working the members in Lapsed or Terminated status?

Are new members invited (verbally and/or via email) to attend chapter meetings and functions either?

Are new members sent a "welcome" letter from the President? Does the letter include chapter unique subjects?

Are bad addresses being worked to correctly identify members and their correct address?

Are members identified on the "4 months before expiration roster" being contacted for renewal?

Does the chapter establish an information booth at various activities such as July 4<sup>th</sup> celebrations, NCO Promotion Ceremonies, Memorial Day events, Veterans Day events, Base Exchange, Commissary, etc?

Are all newly recruited membership applications processed in a timely manner either via the AFSA Web site or mailed to AFSA headquarters (e.g.: not held until a bunch are accumulated)? Are those that have problems (i.e.: invalid credit card data, missing zip code, etc) followed up on to obtain the correct information? Is follow up with AFSA Headquarters accomplished when members do not show up on new reports within two weeks of mailing them to headquarters?,

#### **AWARDS:**

Does the chapter have an awards program? Is there a single point of contact for this important area?

Does the Award Program have a pre-approved budget and include at least:

- Member of the Year
- President's Award
- Recruiter of the Year
- Retainer of the Year
- First Term Airman of the Year
- Volunteer Service Person of the Year

Does the chapter submit at least the following for recognition at Division and or International recognition:

- Chapter of the Year
- Americanism Award
- Humanitarian Award
- Legislative Award
- Web Site of the Year
- Newsletter of the Year
- Member of the Year
- First Term Airman of the Year

Does the chapter aggressively support the Junior AF ROTC Award program with ribbon presentations at the respective high schools?

What is the involvement of the chapter in other special awards programs such as Girl Scouts, Boy Scouts, First Sergeant of the Year, Military Recruiter of the Year, Civil Air Patrol, et al.

#### **AIRMAN ACTIVITY COORDINATOR (AAC):**

Does the chapter have an appointed AAC? Has contact information been included on the Chapter Directory of Officers and sent to Division and AFSA Headquarters?

Does the AAC have an organized plan for frequent activities involving junior enlisted members? Is funding for activities in this plan included in the Annual Budget approved by the General Membership?

Does the AAC provide written input to the quarterly Activities and Americanism Report?

Does the AAC have active and frequent communication with senior base leadership such as the Command Chief(s), President of Chiefs Group, President of First Sergeants Group, Top 3 President, PME Commandants/Flight Chief?

Does the AAC attend all Executive Council and General Membership Meetings and provide a verbal report of activities at these meetings?

Does the AAC actively engage other junior enlisted members to attend AFSA general membership meetings and chapter functions (i.e.: highway cleanup, chapter picnics, Annual chapter holiday party, legislative awareness week programs, etc.)?

#### **LEGISLATIVE:**

Does the chapter have a Single Point of Contact (SPOC) for Legislative activities (i.e.: Legislative Trustee, etc)?

Does the legislative representative attend all Executive Council and General Membership Meetings and present the latest initiatives and status of legislation in Washington (as furnished by AFSA Headquarters)?

Is the Legislative SPOC aware of AFSA's Annual Legislative Awareness Week? Do they plan special "legislative-related" activities during that week?

Does the Legislative SPOC get the chapter involved with Voter Registration?

#### **PLANS and PROGRAMS;**

Does the chapter Executive Council prepare and present an annual Plan for chapter involvement? Is the plan presented to the General Membership with ongoing updates at each chapter meeting?

Is this area thoroughly planned for in the Annual Budget?

Is the Annual Chapter election meeting planned and announced to the general membership?

Does the Plan include chapter social events such as chapter picnics, chapter holiday parties, etc?

Does the Plans and Programs SPOC include the AAC in the planning process to ensure junior enlisted involvement?

Does the Plans and Programs SPOC include the Auxiliary President in the planning process to ensure Auxiliary involvement?

#### **ACCOUNTABILITY CONCERNS:**

Does the chapter have assets in addition to those in a checking account?

Are ALL assets being accurately reported to AFSA Headquarters (i.e.: bonds, CD, investments, property, etc) for inclusion on the IRS group 990s?

Does the chapter submit the required USAF letter to their respective JAG/Services for approval to operate on base?

Does the chapter retain the annual insurance coverage provided by AFSA International. If the chapter also has its own coverage for special events, does it provide a copy to JAG and AFSA Headquarters?

Is the chapter Executive Council and contractors bonded if the chapter is conducting operations outside normal AFSA activities (i.e. hiring personnel or contractors to operate bingo operations)?

#### **OTHER:**

Does the chapter have a succession plan? Does it include a "how to" on completing the quarterly and annual reports?

Are all records, previously filed reports, and minutes being passed to new officers?

Do Chapter presidents know how to access reports from [www.afsahq.org](http://www.afsahq.org)?

Has the chapter helped explain to members how to log into the AFSA Web site and how they can renew and update their membership profile?

Do chapter membership committee members know how they can enter new member applications and renewals on the web site?

Has the chapter given orientation briefings to new and prospective members?

Has the membership committee developed a recruiting and retention strategy?