**AFSA Checklist for Chapters**

The following is a handy checklist of actions required, points to remember, and ideas for managing and AFSA chapter. This document is not a source document, but it was does include information from governing documents, division guidance, the AFSA HQ website, and has fair amount input from the good idea fairy.

Meetings (Executive Council, General Membership, Other)

* 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 and Treasury Report 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 Treasury 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/Annual Reporting

* Are quarterly reports being prepared IAW AFSA guidelines (i.e., proper format, required signatures, timeliness, etc)?
* Is the Chapter Directory of Officers accurate at all times? Was a new Directory of Officers submitted NLT January 15 and dated in the current calendar year? This is a mandatory, annual requirement!
* 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 CYs Annual Budget submitted NLT January 15 and dated in the current calendar year? Did the budget contain the Chapter President’s signature AND the date the General Membership approved the budget?
* Was the Activity/Americanism & Financial 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 Activity/Americanism & Financial Report withstand the IRS and or GAO test of tax exempt for a non‐profit Association?
*  Was the Activity/Americanism & 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? Does the Chapter checking account have the Chapter’s Tax ID Number?
* Are all checks over an established amount (per Chapter standing rules) signed by both the Treasurer and President or Vice President?
* Does the quarter Activity/Americanism & Financial Report contain input from the Airmen Activity Coordinator?

File Disposition

* It is recommended that all field organizations maintain historical files for the life cycle of the organization.
* It is recommended that all field organizations maintain all quarterly/Activity and Americanism/ Financial and treasurer’s reports for 3 years.
* It is recommended that all field organizations maintain administrative files and reports for 1 year.

Miscellaneous

* Are Chapter Standing Rules approved annually by the General Membership? This is mandatory!
* 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 meeting 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 pertaining 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/HighFLIER and/or TwinFLIER (Top Performers) recognition through training members on how to recruit and retain?
* Does a knowledgeable Chapter Representative brief at ALS, FTAC, NCO Academy, First Sergeants Meetings, Chief Group Meetings, Top 3 Meetings, etc?
* Does the Chapter President/Vice President and the Membership Chair monitor Chapter recruit/retention efforts and results? Are they 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 the 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 status?
* Are new members invited (verbally and/or via email) to attend Chapter meetings and functions?
* Are new members sent a “welcome” letter from the Chapter President? Does the letter include Chapter unique subjects?
* Are bad addresses being worked to correctly identify members and their correct address?
* Are members identified in the “4 months before expiration roster” being contacted for renewal?
* Does the Chapter establish an information booth at various activities such as July 4th celebrations, NCO Promotion Ceremonies, Memorial Day events, Veterans Day events, Base Exchange, Commissary, etc?
* Are Chapters using the most current HQ AFSA membership application forms for their recruiting purposes? Are all membership applications processed either via the AFSA Web site or mailed to AFSA Headquarters (i.e., in a timely manner)? Are those that have problems (i.e., invalid credit card data, missing zip code, etc) followed up on to obtain the corrected 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
  + Airman of the Year
  + CMSgt Richard L. Etchberger NCO of the Year
* Volunteer Service Person of the Year
* Does the Chapter submit at least the following for recognition at the division and/or international level:
  + Chapter of the Year
  + Americanism Award
  + Legislative Award
  + Web site of the Year
  + Newsletter of the Year
  + Member of the Year
  + Airman of the Year
  + CMSgt Richard L. Etchberger NCO of the Year
* 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 etc.

Trustee, Airman Activity

* Does the Chapter have an appointed Trustee Airman Activity? Has contact information been included on the Chapter Directory of Officers and sent to the Divisions and AFSA Headquarters?
* Does the Trustee have an organized plan for frequent activities involving junior enlisted members? Is funding of activities in this plan included in the Annual Budget approved by the General Membership?
* Does the Trustee provide written input to the quarterly Activities and Americanism Report?
* Does the Trustee 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?
* Does the Trustee attend all Executive Council and General Membership Meetings and provide a verbal report of activities at these meetings?
* Does the Trustee actively engage other junior enlisted members to attend AFSA General Membership Meetings and Chapter functions (i.e., Highway Clean‐up, Chapter Picnics, Annual Chapter Holiday Party, Legislative Awareness Week Programs, etc.)?

Legislative

* Do you point people to the Capitol Hill Operator to share their views with their Congressional Representatives? 202‐224‐3121 or focus them on CAPWIZ?
* Does the Chapter have 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?
* Is the Legislative SPOC aware of AFSA's Annual Legislative POW/MIA Day Events? Do they plan special events 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 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 & associate members in the planning process to ensure their 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 AFSA International insurance coverage form to their respective JAG/Services for the approval to operate on base?
* Does the Chapter have a copy of 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)?
* Does the Chapter submit the Chapter Group Filing Authorization Form at the end of each fiscal year? This is due at HQ NLT November 15 annually as required by IRS.

Support Operations

* Divisions and Chapters can log onto the AFSA Web site and go to the AFSA Web Store to request membership material. Stroll through the membership material, click on the brochure or pamphlet you desire, enter your requested quantity, based on availability, AFSA Headquarters will ship to your mailing address.
* AFSA recognition awards such as medals, certificates of commendation and certificates of office are also available under the product category area in the AFSA Web Store.
* If you are looking for a gift, visit our plaque, mug, cap, and coin categories in the AFSA Web Store.

Other

* Does the Chapter have a succession plan? Does it include a “how to” on completing the quarterly and annual reports?
* Are all records, to include the Chapter’s Tax ID Letter, previously filed reports, and minutes being passed to new officers?
* Do Chapter Presidents know how to access reports from [www.hqafsa.org?](http://www.hqafsa.org/)
* Do Chapter Presidents periodically review local zip codes to assist the Division President in determining zip code assignments (new housing areas, etc)?
* Does the Chapter leadership submit appropriate Chapter‐related digital photos (with captions) to the Publisher at HQ AFSA for publication consideration in the AFSA Magazine and/or on the HQ AFSA website? Submit quality photos that are large enough in size for publication (minimum 500KB) via email to [staff@hqafsa.org.](mailto:staff@hqafsa.org) NOTE 1: Photos displaying minor children requires a signed release from their parent/guardian prior to publication. NOTE 2: Submitted materials will not be returned.
* Does the Chapter leadership submit appropriate Chapter‐related articles/stories to the Publisher at HQ AFSA for publication consideration in the AFSA Magazine and/or on the HQ AFSA website? Please submit writings in Microsoft Word or any text format via email to [staff@hqafsa.org.](mailto:staff@hqafsa.org) NOTE 1: Submitted materials will not be returned.
* 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?