



Outline: USCPFA chapter officers' checklist

Yearly chapter officers' duties, first year.

First month:

Read and familiarize yourself with the chapter officers' checklist of duties.

Retain a copy of important documents.

By-Laws, National, on national website www.uscpfa.org

By-Laws, Regional

By-Laws, Chapter

IRS letter of tax exemption (National level only; chapter exemption is a state/local matter.), attached. **See below**

Membership report/record from outgoing membership chair, get copy.

If not available at chapter level, contact national membership chair.

Double-check membership accuracy and validity.

Get copy of financial and bank statements and checkbook from outgoing treasurer.

For president: overview.

For treasurer: your responsibility to balance and write checks.

Appoint/elect board to assist - it is a team effort.

This depends greatly on chapter size.

Note: this is where future leadership may come from.

Notify region and national of new slate of officers.

Provide press release to local news media.

Breathe deeply and keep a sense of humor.

Start a notebook of possible program ideas and/or suggestions.

Start a notebook of press contacts.

Do you have or wish to build any joint partnerships with local groups?

Six months in.

Should have clear vision of financial condition and capabilities, but these will most likely be fluid.

Should know names and faces of membership.

Have you had programs/meetings?

Any publicity?

Any change in membership?

Any significant change in financial condition?

Do you have a regular place and time for meetings?

Is it time to at least think of leading a tour group?

Have you promoted national events and programs?

Tours

Convention/Seminar

CTAC

Are national materials familiar and available?

Film Library

Have you promoted regional events and programs?

Have you been able to reach out and cooperate with any other groups?

Are all chapter members getting USCR?



Are all chapter members aware USCPFA has a national website?

Have all forms/reports been submitted on time?

Have you gotten any committee reports?

Do you have copies of and have read:

National By-Laws?

Regional By-Laws?

Chapter By-Laws?

One year in.

Is it time to think of a chapter website/blog?

Have all deadlines and reports been successfully submitted to national and regional representatives?

Are you happy with your local community's perception of your chapter?

Is your membership growing?

Is the chapter financially better off?

Do you have a line of communication open to your regional officer(s)?

Do you have a line of communication open to your national officer(s)?

Do you have lines of communication open to your membership? Website/blog/newsletter/phone tree?

Were National dues submitted on time?

Notes:

From Marge:

IRS letter of tax exemption (National level only, chapter exemption is a state/local matter.), attached.

The state/local exemption applies only for sales tax.

IRS exemption applies to all chapters regardless of state or city.

Other: Have a notation to insert "Look at Charter of Inc?" under important documents.

Impractical to include/attach National By-Laws as they are 18 pages!????