



UNITING AIRMEN SINCE 1961

Division 3 Chapter Officer Training April, 2015



AFSA History

The Air Force Sergeants Association was founded in 1961 by four Air Force NCOs who recognized the need for an organization to represent the voice of all enlisted personnel to America's elected and military leaders. AFSA founders Benny McGehee, Lee Thompson, Virgil Perry and Don Ward established the association, and McGehee later became the first president, becoming the first representative of an all-enlisted organization to give testimony before the House Armed Services Committee.

AFSA's Mission.

To advocate improved quality of life and economic fairness that will support the well-being of the Total Air Force (Air Force Active Duty, Air National Guard, and Air Force Reserve Command) enlisted personnel and their families.

4 Pillars of the Air Force Sergeants Association

1. LEGISLATION

- Legislation is AFSA's vector! Our team of professionals works 24/7 to protect the pay, benefits, and quality of life of all enlisted Airmen and their families - not just our AFSA members. We reach out to all members of Congress and share the Airmen's story. AFSA has proven to be a "go to" organization for Congress when key testimony is needed. We stand tall and proud for you!

2. MEMBERSHIP

- Membership is AFSA's thrust! We pride ourselves as acting as "The Voice of the Enlisted." AFSA's voice comes from our members who show their support in AFSA through their initial and continued membership. The larger our membership—the greater our voice on Capitol Hill. We are your servant leaders! Our power comes from you! Walk with us—and we will walk with you!

3. COMMUNICATIONS

- Communications is the glue that holds AFSA together. AFSA uses a combination of newsletters, alerts, web site updates, Facebook, Twitter, and more to keep our members up to date on key legislative developments. Chapter meetings, conventions, and more increase the positive flow of communications as well—and also provide opportunities for the development of oral communications, mentorship and leadership among our enlisted Airmen.

4. FRATERNITY

- Fraternity represents the shared values that create the bond for our members. We pride ourselves on supporting—and living—the values of our beloved Air Force. We strive on integrity, service before self, and excellence in all we do! AFSA is a family of wonderful professionals! We have each other's "six"—we fight, win, and experience joy as a team! I'm good—you're good—but together--we are better!

Today's Objectives

- Provide overview of AFSA operations and governing documents
- Review required quarterly and annual reports
- Division standing rules
- Awards program
- Chapter Leadership Reference Glossary
- Recruiting/Retention
- Chapter checklist
- Other items of interest

Governing Documents

- AFSA Manual 100-1 Bylaws,
October 2015
- AFSA Manual 100-2 Policy and Procedures,
October 2015
- AFSA Manual 100-3 Standard of Conduct for Officers,
October 2015
- AFSA Manual 100-4 Daily Operations and Requirements,
October 2015
(100-4 contains majority chapter management guidelines)
- AFSA Manual 100-5 Awards and Recognition Programs,

October 2015

Check web site for updated/revised manuals and forms

Quarterly and Annual Reports

- Chapter Group Filing Form “990 form” , Due Nov 15th, Yearly
- Approved Budget, Due Jan 15th, Yearly
- Audit, Due Feb 15th Yearly
- Directory of Officers (DOO), Jan 15th, Yearly “due 15 days after changes are made within chapter leadership”
- Activity, Americanism & Financial (AAF) Report, 30 days from end of quarter
 - All reports to be emailed to the Div President
 - AFSA reports are based upon calendar year reporting “CY”
 - Div 3 Standing Rule 2015-3 outlines how reports are handled within Div 3
 - Chapter reports are due to the Div President no later than the 25th day following the end of the quarter (this allows the Div president to review and forward chapter reports to AFSA on time)
 - **Report naming; the report file name “moniker” needs to show the chapter number, report name, what qtr it is from and the CY, i.e. 0984 AAF 1st Qtr 2015**

Quarterly and Annual Reports

- DOO drives access to reports, (*if DOO is not updated by 15 Jan, system will lock you out*)
- Members on DOO must be in good standing (*if your membership inactive you will be locked out*)
- 990 form must be to HQ NLT Nov 15th every year, (failure to submit 990 form could result in your chapter filing their own tax returns) you don't want to do this.
- Audit and 990 must have actual signatures, must be scanned and emailed in, this is a legal document, IRS and auditors requirements
- **NOTE:** IRS sometimes misplaces the group filing 990 from AFSA which results in a letter from the IRS of last known chapter/division president, if this occurs just get with division president to remedy situation

Quarterly and Annual Reports

Failure to send in reports on time will result in loss of administrative funding, waivers will not be given once auditors have closed the qtr.

AFSA reporting quarters:

1 Jan to 31 March

1 April to 30 June

1 July to 30 Sept

1 Oct to 31 Dec

Federal Identification Numbers (FEIN) listed in Div 3 SR 2015-3, this is required on financial report, audit and 990 form

Use updated forms from AFSA web site

Financial report form is used for all 4 reporting qtr's,

Common mistakes, beginning fund balance is not carried over from prior year/qtr, ending balance doesn't reflect balance of total account balance on page 2. corrected qtr's not corrected back to proper qtr. qtr rebate not entered in correct quarter

Quarterly and Annual Reports

Why AFSA Requires Accurate and Timely Audit, Budget, Financial, Activity and Americanism, and Directory of Officer Reports

AFSA is tax exempt under Section 501(c) (19) of the Internal Revenue Code. To extend this tax-exempt umbrella to the divisions, chapter, and auxiliaries, AFSA files "annually" a 990 Form Group Return. To properly prepare the Group Return, AFSA must have the financial information and activities of each division, chapter, and AFSA Auxiliary. A majority of the information provided is financial: assets; liabilities; fund balances; revenues and expenses. The other required information pertains to activities and officers, divisions, chapters, and auxiliaries addresses. As you can see, it is very important to keep accurate records, submit accurate and timely reports, and keep the AFSA HQ informed.

The Internal Revenue Service is aggressively pursuing the non-profit sector because there are billions of dollars each year that non-profit organizations collect and spend that are not taxed. AFSA must make sure that all the information that is submitted to IRS is thorough and accurate so that AFSA does not violate any of the regulations or tax laws. The 990 Group Return must also be easily accessible to the public, Internal Revenue Service, and Government Accountability Office. All financial information must be accurately disclosed and all reports must be submitted in a timely manner to avert the loss of this tax-exempt umbrella. Otherwise, divisions, chapters, and auxiliaries will be required to pay taxes on revenues received each fiscal year in accordance with IRS tax regulations; each division and chapter must file annually, a filing authorization form (Chapter Group Filing Authorization) which allows headquarters to include the division or chapter on the 990 Group Return.

Quarterly and Annual Reports

Why AFSA requires the Activity and Americanism Reports

The submission of the Activity and Americanism Report allows AFSA to use restricted insurance revenues generated from AFSA's Insurance Programs to fund general operations (General Fund). AFSA is a veterans organization; therefore, the IRS allows AFSA to document Americanism activities. Reporting these activities, allows AFSA to make available (to AFSA) monies from vendors, the insurance programs, etc. that would otherwise be classified as restricted and as 'unrelated business income'. This income is taxed at a rate of 35% or higher. AFSA is in the business of utilizing all available resources to legally fund the goals and objects of the organization.

It is the division/chapter president's responsibility to review, sign, and submit all Financial Reports, Budgets, Audits, Activity and Americanism Reports, and Directory of Officers to the International Headquarters. If sending electronically, a cover e-mail from the president must accompany each transaction and list the reports and dates prepared.

Americanism projects and activities;

Patriotic events, scholarship programs, youth programs, veteran and military related support programs, medical facility patient/resident support, enlisted recognition and award ceremonies, services and benefits to military personnel and their families, recognition of leaders who have supported the enlisted corps and other events and functions that enhance the mission accomplishment of the Total Air Force, Active duty, Air National Guard, Air Force Reserve and retirees, Civil Air Patrol and Air Force Junior Reserve Officer Training, Boy and Girl Scout functions, POW celebrations, VA and State veteran hospitals and homes.

Quarterly and Annual Reports

Retention of Records

Records should be kept on file by the division/chapter president or other designated officials. If the secretary keeps the minutes on file, the president should have a copy. The guidelines for retention of AFSA/AFSA Auxiliary records are as follows:

- Organizational property and division/chapter assets are to be retained permanently.
- Division/chapter minutes are to be retained permanently.
- Financial records, which would include the division/chapter treasurer's files and the quarterly financial statements, are to be retained for three years.
- Activity and Americanism report and any other field report should be retained for one year.
- Other miscellaneous records should be retained for one year.
- Bank and credit card statements should be retained for three years.

Division Standing Rules

- Div 3 SR 2015-1 Division Officers/Executive Council
- Div 3 SR 2015-2 Funding and Claims for Reimbursement
- Div 3 SR 2015-3 Reports
- Div 3 SR 2015-4 Awards
- Div 3 SR 2015-5 Scholarships
- Div 3 AFJROTC/Civil Air Patrol award guidelines (2013)

Chapters Standing Rules:

- The general membership of the chapter may adopt lawful Standing Rules that are not in conflict with any directive from AFSA HQ or Division.
- Standing Rules are useful and helps promulgate chapter management regarding local chapter operations and activities.

AFSA Award Program

- AFSA Awards Covered in Manual 100-5
- AFSA Awards Preparation & Submission Guide
- Div 3 SR 2015-4
- Award Due to AFSA HQ On 1 May of each year
 - Div 3 Deadline is the Middle of March, cut off date determined yearly based upon dates of Div conference.
 - Late Submission or Wrong Format Will Not Be Accepted
- Period of awards are 1 Jan – 31 Dec.
 - Individual Award Nominees Must Be a Member Prior to 1 July of the previous year
- Chapter of the Year Submission Should Reflect What is Reported on Qtrly Activity & Americanism Reports
- Bullet Statement Must Be Written to Award Category
 - Ex: Community Service Award Should Not Include Statements About Membership Events

Division/Chapter Leadership Reference Glossaries

- Glossaries Were Created to Quickly Find an Answer to a Issue/Problem or Question pertaining to effective running of a Chapter
- Ongoing project as manuals are updated
- Glossary Broken Out in Three Areas of Responsibilities
 1. President and Vice President
 2. Treasurer and Secretary
 3. Trustee
- Located on Div 3 web site

Recruiting and Retention

Recruiting and Retention is our life blood

Work chapter 4 months rosters

Bad address listing (BAL)

- Use military global email listing

- Use Facebook, google, whitepages, intelius (paid site) and any other internet sources to locate members

- Use online vs snail mail for new members and renewals

- Use auto renew on credit card

- Tech School members assigned to 8888 chapter and will be reassigned upon PCSing to permanent duty location

- Snail mail recruiting and retention submission cut off is 26 Dec 2014

- Online recruiting and retention cut off is 26 Dec 2014

- Stay connected to new members with in the first 60-90 days

- Follow up, email, telephone, newsletters, facebook, etc

- AFSA is an avenue to get involved and engaged

Chapter Checklist

Created as a Handy Checklist of Actions Required, Points to Remember and Suggestions to Manage an Effective and Engaged Chapter

Topics covered:

- Meeting Dates, Times, Meeting Minutes
- Meeting Agenda
- Chapter Exec Council/Trustee Roles and Duties
- Training
- Reports
- Membership
- Working Rosters
- Awards
- Legislative Programs
- Elections
- Other miscellaneous Chapter Issues

- Work , 4 Month and Bad Address Listing (BAL)
- Administration Support Payments Are \$.25/per Member
 - Does Not Include Unassigned or Members on the BAL
- Recruiting/ Retention Rebates for New/Retained Members \$1.00
 - It Pays to Recruit/Retain & Work Rosters
- **Fund Raising events;**
 - Coin sales, Wrapping Xmas Gifts, Sponsoring Sporting Events, Air Show Booths, Seek Donations From Local Community Businesses, Banks, Credit Unions, Etc
- Support Business That Support AFSA, i.e. USAA, Marsh and other business listed in the AFSA Magazine.
- Use Voter Voice on the Legislative Action Center (LAC)!!
- Establish a Facebook Page

- Operating as an (Nonprofit Non-Federal Entities) on military bases
 - DoD Directive 1000.26E, 1000.15
 - Requirements contained in AFI 34-223
 - Work With Your JAG and Force Support Squadron
 - Reference Sec-Def Letter Hagel Dec 2014
 - Use of DOD Email
 - AFI 33-129, para. 2.1; DOD 5500.7-R, JER, Don't Use to Promote Legislative Issue
 - Could Paint DOD in a Negative Way
 - suggest an Off-Base Mail System (Gmail, Yahoo,..etc)
 - Contact Division and AFSA CEO if misunderstanding occur at chapter level concerning supporting Non-Federal Entities (NFE)
- Continuity book, keep it updated easier for people to step up when needed
- Drop box file sharing and electronic file storage, www.dropbox.com
- AFSA web site, Div 3 web site, is a wealth of information

Voter voice Legislation Tool

What is Voter Voice Legislation Action Center

- Designed as an Easy to Use Tool for Contacting Your Elected Officials
- Used as Research tool to Find out What is Happening on Capitol Hill
- Most Importantly, Find Out if Your Elected Officials is Looking Out for You

How to access Voter Voice

- Voter Voice can be accessed through this link: <https://www.votervoice.net/AFSA/home>

What can I do on Voter Voice Legislation Action Center

- Send an email to your elected officials about an issue that is important to you
- Research candidates for public office at the state and federal level
- Research federal government agencies
- Research all legislation currently before congress
- Sign up to receive voting records for your elected officials
- Learn basic etiquette for contacting Congress

Why is all this important?

- If Our Association is Going to be Successful in Our Lobbying Efforts
 - Our Membership Must Be Proactive and Contact Their Elected Officials
- Be Proactive in Contacting Our Politicians
 - We run the Risk of Losing Everything We Won Over the Last 40 Years

Social Media & Web Hosting

- Social Media
 - AFSA is Constantly Updating Web Site
 - “Friend” AFSA Facebook Page
 - Division Dropbox (assessable only on non DOD computers)
- Division 3 Web Hosting
 - What We Can Offer Each Chapter
 - Low Cost
 - Requirements
 - Responsibility
 - Contact Gary Swanson For More Details
 - Use current AFSA logos/art, check AFSA web page for updated copywrited logos and art

International PAC

- AFSA International Conference (PAC)
- August TBD, 2016 in San Antonio Texas

Grand Hyatt River Walk

Future PAC locations;

2017 Reno

2018 San Antonio

2019 San Antonio

2020 hotel contract ends, future site TBD whoo-hoo

AFSA Funds Registration and Hotel for Amn, NCO, MOY AFSA and Family

Member award

Division covers Travel

Questions??

In Closing

I Want to Thank Everyone in Div 3 For Their Hard Work,
Dedication and Commitment to What AFSA Stands For

The Heart of a Volunteer is Not Measured in Size, But By the
Depth of the Commitment to Make a Difference in the Lives
Of Others

Volunteers Are Not Paid -- Not Because They Are
Worthless, But Because They Are Priceless