



CHAPTER HANDBOOK

Fourteenth Edition | December 2017



This handbook was developed by the State and National Group Office of Volunteer Engagement with the guidance, input, and review of chapter leaders, volunteers, and staff.

This Chapter Handbook belongs to:





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AARP is the nation's largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation's largest circulation publications, *AARP The Magazine* and *AARP Bulletin*. To learn more, visit www.aarp.org or follow @AARP and @AARPadvocates on social media.

AARP Chapter Handbook

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Preface

A Message to AARP Chapters

In 1958, AARP founder Dr. Ethel Percy Andrus envisioned a national organization representing the interests of people 50+ and complete with chapters mirroring its ideals at the community level. Recognizing that those chapters—with their members' lifetimes of skill, experience, and wisdom—had much to offer, she insisted that these local entities be rooted in the spirit and challenge of service. Over the next 50 years and with the help of “Ethel’s army” of chapters, AARP built on that tradition of service and is now a leader for positive social change in America.

Today, a renewed spirit of service is sweeping the country. Americans of all ages and occupations are coming together to create and support opportunities to resolve this nation’s growing challenges through citizen-powered solutions. By taking on leadership roles in the community, promoting volunteerism, and partnering with other organizations similarly committed to service, chapter members continue to provide service to their local communities.

In recognition of the importance and value of chapters, AARP is providing this 14th edition of the AARP Chapter Handbook to ensure that chapters are given all the knowledge and guidance they need to operate as efficiently and effectively as possible. This handbook also emphasizes more than ever the need for volunteer service; member involvement; and strong, strategic connections between Chapters and AARP. While much of the material in this handbook is administrative in nature, a great deal of the information can be used as a guide to help chapters determine the best way to stay focused, relevant, and moving forward.

The AARP chapters deserve a big thank you for all their hard work and service. With their continued assistance and success, chapters will enhance the ability of the AARP family of staff and volunteers to do all that it can to serve, support, and inspire our neighbors, our communities, and our nation.

Thank you!

The Role of the Chapters

The chapter is a chartered entity of AARP, and a face—and heart—for AARP in the local community.

“To serve, not to be served”

The role of the AARP chapters is best expressed in the words of AARP’s founder, Dr. Ethel Percy Andrus: “AARP has promoted the initiation and development of local volunteer chapters ... for those members who favor the goals of individual growth and service to self, to fellow members, and to the community in general.”

Chapters are unique, Dr. Andrus emphasized, “in that they are service centers and do not stress or promote activities of an entertainment, social, or recreational nature.” She believed strongly that the need for fellowship and social interaction was best met through activities that were useful to one’s own self and especially to others. Her vision for chapters, for AARP and for all people 50+ is captured by the AARP motto, “To serve, not to be served.”

That motto and the vision it embodies are the foundation of the principal objectives and purpose of the chapters, as set forth in the AARP Chapter Bylaws, which stress community service, an active and useful life, self-actualization and development, and a commitment to the ideals of AARP. Every chapter—indeed, every chapter member—should strive to live up to and accomplish the purposes of AARP in ways that meet specific needs within their community.

The Origins of Chapters within AARP

Dr. Andrus and a group of founding directors who were members of the National Retired Teachers’ Association (NRTA) incorporated AARP on July 1, 1958, in Washington, DC. Then known as the American Association of Retired Persons, AARP was established as a national organization representing the interests of people 50+ Americans. The organizers, however, soon recognized the value of forming community-based units to reflect the philosophy and echo the purposes of AARP at local levels.

The response from members was overwhelmingly positive. In September 1960 Dr. Andrus, who became AARP’s first president, approved the application for recognition of the first AARP chapter, in Youngtown, Arizona, and by the end of 1961, 100 chapters had been

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formed. The process of establishing chapters continued at a rapid pace, with chapters frequently springing up in cities visited by Dr. Andrus.

In the mid-1960s AARP began to standardize the various operating rules and procedures for its chapters. In 1965 the AARP Board of Directors developed the AARP Chapter Bylaws to further serve this purpose. The Chapter Bylaws were an important step in unifying the young organization into a viable national association, and the Chapter Handbook is an extension of that process. Next, AARP began incorporating chapters within their respective states.

Goals and Objectives

The chapter's mission is to provide a link at the local level between members, communities, and AARP's programs and services. The chapter's leadership and commitment to volunteerism is an invaluable resource in making our communities better places to live and work for all people.

Chapters advance the mission, programs, and activities of AARP, supporting it with goals and objectives set across a range of functions, including the following.

- **Community Service**—Create and enhance opportunities for members to be involved in activities that address a platform of community needs.
- **Leadership**—Develop members' skills and potential to assume positions of increasing responsibility within their chapter, their community, and AARP.
- **Communication**—Facilitate the exchange of information between members and AARP, typically through the state offices.
- **Recruitment**—Increase chapter and AARP membership, ensuring continued growth with greater member-diversity.
- **Fellowship**—Conduct activities in a manner that fosters congeniality and friendship.
- **Advocacy**—Participate actively in addressing issues that have an impact on members and their communities, in accordance with AARP policies, practices, and positions.
- **Education**—Impart knowledge that is useful to individuals and the community through programming that may include AARP materials.

At the community level, chapters enhance the quality of life for people as they age, further the independence and dignity of these individuals, and improve the image of aging. As change-agents, chapters help assess the needs of people 50+, working positively with AARP to obtain constructive responses to those needs.

Chapters, pursuant to AARP's mission and policy, advocate for people 50+; educate and inform them (and the general public) about health care, economic security, consumer protection, and other key issues; and serve as catalysts for other community organizations and the development of needed programs and services, such as improved public transportation, nutrition sites, and clothing banks.

Chapters implement a variety of programs and projects, mobilize volunteers, and support the activities of other service organizations with compatible philosophies and goals. This activity allows chapters to create and promote opportunities for members to put their wisdom, energies, and talents to work in service to fellow citizens and their community.

Finally, chapters promote a healthy image of living and aging by demonstrating vitality, creativity, and leadership in their community involvement. This community spirit can have a significant impact on attitudes regarding people 50+ and the aging process itself.

Engaged in these and other activities, AARP members have the opportunity to learn, to grow and to serve as leaders in their chapter and their community. Chapter leaders and members desire to remain abreast of AARP's programs and policies and conduct themselves at all times in accordance with the organization's standards. (Please note that chapters are not authorized to set or alter AARP policy.)

The Chapter Today

AARP would not be the dynamic force it is today without the chapters' participation and support. In fact, along with our state offices and local Retired Educators Associations, the leadership and commitment of AARP chapters have never been more critical to our efforts to create true social change and add real value for our members.

In addition, any discussion of chapters and community service at AARP would be incomplete if it did not acknowledge the important contributions made by chapter officers and committee leaders. These

individuals are among the most valuable of AARP's resources, for the vitality of the chapter, both today and tomorrow, is tied directly to their commitment, energy and creativity. The chapter's effort and ability to identify and nurture future leaders, therefore, are critical indicators of the unit's continued achievement.

As AARP has grown, so have opportunities for service. AARP chapters are part of an extensive network of programs and activities conducted primarily by members and volunteers at the local, community, and state levels. Along with other AARP units and volunteers, chapters support AARP efforts in the following areas:

- Legislation and advocacy
- Health care and wellness
- Consumer information and protection
- Community service

Currently, there are AARP chapters across the country working to fulfill their charge to communicate and implement AARP's philosophy and programming within their communities. AARP has offices in each of the 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. Together, states and chapters provide a highly visible, positive image of AARP regionally and locally, working in tandem to carry out AARP's advocacy, education, and service responsibilities.

AARP's advocacy at the national, state and community levels is nonpartisan. AARP's issue-based efforts are designed to improve the quality of life for all generations. These efforts are governed by and approved by the National Board of Directors. The chapter's Legislative Committee, working with the state office (which is charged with interpreting AARP legislative policy within each state), is a key resource for AARP in fulfilling its advocacy mission.

AARP provides information on a variety of subjects and through a range of media on issues and services of concern to older adults and their families. The chapter, aided by its Public Relations Committee, facilitates this function by conducting educational programs at chapter meetings, publishing articles on pertinent topics in the chapter newsletter, and publicizing AARP programs or current issues through community media outlets.

The chapter's Membership Committee assists AARP by making chapter and national members in the community aware of AARP's

member services. Being a part of AARP means enjoying a list of benefits, including timely, informative, and entertaining publications. In addition, the *AARP Bulletin* provides up-to-the-minute news of current events, important legislation, and member activities. AARP's website, aarp.org, is another source of news and information.

AARP members and, in certain other circumstances, other eligible individuals have access to needed products and services from third-party providers and they can take advantage of programs and education efforts that help people prepare income tax returns, improve their driving skills, plan for retirement, or offer volunteer and connecting opportunities. The AARP brand gives our members confidence in the integrity, practicality, and value of AARP-branded products and services, as well as programs.

Chapters today are expanding their horizons in terms of member and community outreach. For example, some have established telephone contacts that members and neighbors can call to request the latest information on AARP programs and services. Others maintain an office in their community staffed by volunteers to provide yet another level of service in their area. And, increasingly, chapters are mastering the Internet, establishing home pages, bulletin boards, and email capabilities to publicize their chapter activities, celebrate AARP, and communicate with members and potential members, often with the assistance of the state offices.

Community service, of course, is the embodiment of "To serve and not to be served." The AARP Community Service Initiative—including Driver Safety, and the Create The Good® website and database (CreateTheGood.org) where individuals or groups can post or look for volunteer opportunities—helps AARP honor its legacy and remain relevant to the needs of today's community and today's volunteer. AARP's charitable affiliate AARP Foundation, also provides many volunteer opportunities through its programs such as—AARP Foundation Tax-Aide and AARP Foundation SCSEP.

The chapter's Community Service Committee identifies and coordinates service activities, which can vary widely from chapter to chapter, depending on local needs, interests, and abilities. For example, members not only provide a range of support vital to older adults, including delivering meals on wheels, assisting with chores, and providing telephone outreach. Additionally, they offer services of

value to other groups and to the community at large. These contributions can include volunteering as mentors for young students, collecting back-to-school supplies for needy children and their families, conducting winter clothing and holiday toy drives, and much, much more.

About This Chapter Handbook

The Chapter Handbook provides important information and material for use by chapter leaders in administering and facilitating core chapter operations. Subsequent sections of this handbook are devoted to overall chapter operations, chapter bylaws and standing rules, the role of the chapter board, and guidelines for officers and committee leaders.

For more information, contact:

AARP Office of Volunteer Engagement
601 E Street, NW
Washington, DC 20049
volunteer@aarp.org
1-866-740-7719

Chapter Operations, Governance and Policy

Chapters are chartered under AARP and legally incorporated in the state in which they operate. As a legal entity, a chapter has responsibilities it must meet to maintain its incorporation and charter. This section addresses these responsibilities and other duties and functions of the AARP chapter.

Documents Governing Chapter Operations

The policies and procedures governing the operations of AARP chapters are contained in four key documents.

- Articles of Incorporation
- *AARP Chapter Bylaws*
- Standing Rules
- *AARP Chapter Handbook*

Following the guidance provided in these documents will ensure that the chapter continues to meet federal, state, and AARP standards of operation.

Articles of Incorporation

The AARP chapters are allowed to operate pursuant to AARP's status under the United States Internal Revenue Service (IRS) Code as a 501(c)(4) "social welfare" organization. As such, chapters are exempt from federal income tax.

[Note: This tax exemption does not relieve the chapter of the requirement to pay other taxes as may be required by law, such as state sales tax, use fees, etc. In addition, due to the chapter's 501(c)(4) status, individuals cannot take a charitable deduction for any contributions made to the chapter.]

The Articles of Incorporation, created for each chapter at the time it is chartered, stipulate the rules for the chapter's ongoing operation. The Articles of Incorporation document is filed with the Secretary of State in the state in which the chapter operates. The chapter should have a copy of this document on hand and adhere closely to it. If a chapter's Articles of Incorporation document has been lost, the Chapter may

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request another by writing to the Secretary of State and paying whatever fee may be required.

Chapter Bylaws

The *AARP Chapter Bylaws* provide guidance for chapter operations, facilitate its function, and ensure its compliance with IRS regulations. AARP requires all chapters to adopt the AARP Chapter Bylaws by the affirmative vote of a two-thirds majority of the chapter membership. As part of that process, each chapter must select the month of its annual meeting, the amount of chapter dues, and the percentage of members necessary to have a quorum for conducting business. These choices are designated in the appropriate spaces in the Bylaws, a copy of which is provided in the Appendix of this handbook.

Chapter Handbook

The AARP Chapter Handbook, published by the AARP Office of Volunteer Engagement in Washington, DC, is the chapter leader's most immediate source of information about overall chapter operations and administration.

Standing Rules

“Standing Rules” are operating procedures supplemental to the *Chapter Bylaws* and Articles of Incorporation. These rules are established by the chapter to define procedures for operations not specified in the legal documents of the Chapter. For example, depending on its particular need, a Chapter may wish to establish standing rules governing chapter auditing procedures or the reimbursement of volunteers' expenses.

Generally, standing rules address such topics as:

- Membership and dues
- Meeting schedules
- Discretionary officers
- Additional committees
- Financial procedures
- Nominating Committee terms

For additional information, please review the AARP Chapter Model Standing Rules, a copy of which is provided in Appendix C of this handbook. Chapters are strongly encouraged to develop a set of standing rules as a written documentation of the decisions made by the chap-

ter in governing such matters as those listed above. These operating rules enable a smooth administration of chapter affairs and free chapter leaders to devote more time to carrying out the chapter's informational and community service programs and projects.

Typically, Standing Rules are reviewed annually or biannually by the Board of Directors at its first meeting following election. The Standing Rules may be revised by a simple majority vote of the chapter members voting with a quorum present, and updated at the annual chapter meeting. You may contact the AARP Office of Volunteer Engagement if you need additional guidance regarding Standing Rules.

Chapter Reporting Requirements

Chapters are responsible for providing various kinds of information over the course of the year. This information addresses the reporting requirements of the Secretary of State for the state in which the chapter operates, the local government (if applicable), and AARP. It is the chapter's responsibility to know these requirements and to meet all reporting deadlines. Failure to comply with these requirements jeopardizes the chapter's good standing with state and local governments and with AARP.

State Requirements—The reports required of nonprofit organizations vary from state to state. To determine the state's requirements for your chapter, check with your Secretary of State's office or your AARP state office.

Local Requirements—County and/or city regulations in some states have reporting requirements that chapters must follow. Contact your county commissioner or city manager for more information.

AARP Requirements—AARP's annual chapter reporting requirements include:

- **The Chapter Treasurer's Report** is required in filing AARP's group tax return and in monitoring whether funds, if any, generated by chapters, are used in accordance with the rules and regulations established by the IRS for tax-exempt, nonprofit organizations.
- **The Chapter Census & Activities Report** is a required report that demonstrates a chapter's annual compliance with a range of IRS requirements for tax-exempt, nonprofit organizations. This form is sent to Chapter Presidents each year in November.

- Valid email addresses required for two officers.
- **The annual Chapter Officer Update form** provides AARP with current information about chapter officers, committee chairpersons, and meeting location/dates. *[Note: In regard to these compliance issues, under certain circumstances a chapter's status may be suspended or withdrawn by AARP. Information on the causes and processes involved in such action is provided in Appendix of this handbook.]* Please send a current officer list (including addresses) to AARP Office of Volunteer Engagement each year.
- Note: For a copy of the above AARP reports, visit the Volunteer Portal at volunteers.aarp.org or contact the Office of Volunteer Engagement at 1-866-740-7719.
- Chapter must obtain liability insurance coverage.
- Chapter conducts community service projects each year.
- Valid email addresses required for two officers.

Political Activity

AARP is a nonpartisan organization and must maintain a nonpartisan stance with respect to candidates, incumbents, political parties, and public events. Therefore, AARP chapters must always be objective and nonpartisan in their volunteer advocacy efforts on behalf of AARP.

Further, chapter officers, Legislative Committee members, and other certain chapter members, through virtue of their visibility within the community, may be perceived as acting on behalf of AARP, even though they are acting in their own individual capacities. Therefore, chapter members should consider the sensitivity of their particular situations when considering their personal participation in political or partisan activities (of a more visible nature) that the public may construe to be an AARP endorsement. This means not advocating for AARP at the same time the member is actively supporting (on his or her own time) a candidate for political office. In addition, members who are very visible in the community as chapter representatives should carefully consider their situation before volunteering for a visible role within a campaign or publicly endorsing a campaign, (e.g., lawn signs, bumper stickers, hosting fundraisers). Members can benefit from the guidance of their state office in regard to potential conflict situations.

Membership Lists

Chapter members are strictly prohibited from using or allowing others to use AARP chapter membership lists, participant lists, the letterhead, the brand (name, mark, logos or taglines), or their signature blocks (names with titles) for any purpose other than the chapter activities for which they are assigned.

AARP Chapter Trademark Policy

AARP chapters (“Chapter”) play a vital role in the overall mission of AARP, providing member engagement and a volunteer base in support of AARP efforts to enhance the quality of life for all as we age. Chapters are separately incorporated, affiliated non-profit organizations that bring AARP’s mission to life in local communities.

Since 1958, AARP has owned and used the AARP Trademark (including “AARP” in text and/or logo) and service marks in connection with its many social welfare efforts. AARP presently holds several trademark registrations for “AARP” with the United States Patent and Trademark Office. In order to maintain its ownership of the AARP trademarks, AARP must control the use of the AARP trademarks. Therefore AARP grants each AARP-recognized and formally affiliated AARP Chapter a license to use the AARP Trademark as provided herein.

Use of the AARP Trademark

Proper Use. All AARP Chapter materials must be created in compliance with the AARP mission, its nonprofit 501(c)(4) tax-exempt status, AARP policies and all requirements provided in the Badge Use Guidelines which are incorporated by reference within this License. Use of the AARP Trademark on chapter websites, emails, newsletters, domain names and Chapter give-a-ways (i.e., T-shirts, key chains, and bags) is permissible as provided in the Badge Use Guidelines. You should send all questions about proper use to the contact listed at the end of this License (“AARP Contact”).

Use of the Chapter Descriptor with the AARP Trademark on Chapter Materials. Chapters must include the following descriptor clearly on all written materials (i.e., letterhead, newsletters, websites and flyers) where the AARP Trademark is used “AARP Chapters are separately incorporated affiliates of AARP.”

Improper Use. Chapters cannot engage in activity or create materials that would tarnish, disparage, or damage the goodwill of the AARP

brand. In addition, Chapters cannot use the AARP Trademark in connection with the following:

- **Commercial Activity.** Chapters cannot use the AARP Trademark in support, promotion, or endorsement of any commercial activity, including but not limited to, for-profit companies and/or their products or services. In addition, Chapters should not permit any other organization to provide an “AARP discount” or benefit of any kind.
- **Political Activity.** Because of the importance of AARP’s nonpartisan reputation, Chapters cannot use the AARP Trademark in connection with political messages or any political activity, including but not limited to participating in events or activities in support or opposition of any candidate or legislation.
- **Obscenity.** Chapters cannot use the AARP Trademark in association with obscene or lewd materials, including but not limited to, materials with sexual content.
- **Illegal Activity.** Chapters cannot use the AARP Trademark in connection with illegal activities and must abide by all applicable laws.
- **Broadcast & Mass Media.** Chapters cannot use the AARP Trademark in broadcast and mass media formats, including but not limited to, TV, radio, and blogs.

Sublicensing. Chapters are not authorized to grant permission to other organizations to use the AARP Trademark, in any manner. If any organization would like permission to use the AARP Trademark, Chapters should instruct them to email the AARP Contact below to make their request.

Co-branding. Chapters may not use the AARP Trademark in conjunction with another organization’s logo in close proximity or in a manner that would suggest an alliance, partnership, or imply an endorsement of the other organization by AARP.

Information Sharing and Quality Control

In recognition and support of AARP’s interest in understanding chapter activities and need to maintain quality control over its trademarks, ensuring all branding standards are consistently followed, all Chapters must provide the AARP Contact with samples of materi-

als made using the AARP Trademark throughout the calendar year, for example, newsletters, emails and websites. Your use of the AARP Trademark should be uniform and your samples must be an accurate representation of your uniform use. You should include your samples along with your AARP Census & Activity Report.

Shared Responsibility

Protecting the AARP Trademark and brand reputation is a responsibility shared by AARP and its licensees, including all AARP Chapters. AARP is counting on its Chapters to be dedicated to proper use of the AARP Trademark as provided in this License. By working together toward this endeavor AARP and its Chapters will minimize confusion of the general public and sustain the trust in the AARP Trademark by those 50+, including AARP members.

Other Terms

Only officers of an officially AARP-recognized Chapter may use the AARP Trademark. All use of the AARP Trademark must be in compliance with this License. AARP reserves the right to revoke all AARP Trademark licenses granted to each individual Chapter or to Chapters as an entire group at any time and for any reason, including without limitation, violations of this License. Inaction regarding any violation of this License shall not be deemed approval of those violations, or a waiver of any enforcement right of AARP. All material amendments to this License shall be made with written notice to each Chapter. Upon receipt of that notification, all changes announced in that communication shall take effect immediately.

AARP Contact

If you would like to use the AARP Trademark in a manner that is not covered in this License and would like to have your desired use reviewed, or have general questions regarding proper trademark use, please contact the Office of Volunteer Engagement via mail at:

AARP
Office of Volunteer Engagement
601 E Street, NW
Washington, DC 20049
ATTN: Chapter Contact

or via email at volunteer@aarp.org for further assistance. Every effort will be made to respond to all inquiries within five (5) days.

Accessing AARP Resources

It helps to know that there are resources available to help Chapters help AARP reach its goals. The AARP Office of Volunteer Engagement staff at the National Office are the prime point of contact for Chapters. State office staff and volunteers can also provide a ready source of information, tools, and techniques for enhancing a chapter's programs and services. These resources include the following.

- AARP-branded community service programs, such as AARP Driver Safety, AARP Foundation Tax-Aide, the Senior Community Service Employment Program, and more. For additional information visit aarp.org website.
- AARP advocacy initiatives in the state, such as visits with lawmakers and public events at the state capital. For additional information, visit aarp.org.
- The Volunteer Portal (<http://volunteers.aarp.org>) is an online library filled with important tools and timely information to help Chapter Officers in their work with AARP.
- Chapter Advisory Team (CAT)—This team provides peer-to-peer Chapter support and improved communication. CAT members host regular calls in all AARP region to share relevant information with Chapter leaders and facilitate the exchange of ideas on “what works” between Chapters. For more information contact volunteer@aarp.org.

Defining Chapter Success

“Never doubt,” in the words of Margaret Mead, “that a small group of thoughtful, committed citizens can change the world.”

On the other hand, there is the Swahili proverb that cautions, “A boat doesn’t go forward if each one is rowing their own way.”

What success looks like for AARP at the local level is a critical question for chapter officers and members to consider in leading AARP forward. Certainly, the answer begins with chapter compliance with the state, local, and AARP reporting requirements described above. Success can be further defined in many ways, but for most chapters it means::

- Membership is either growing or stable.
- Members express a high degree of satisfaction about chapter activities and community service programs. Programs are essential and should appeal to the membership and maintain interest and be informative. Successful Chapters provide a combination of business, interesting programs and social activities.
- Activities are diverse enough to appeal to a wide range of member interests.
- The chapter maintains a positive image in the community.
- Chapter Officers are informed and aware of their role and responsibilities.
- The pursuit of chapter excellence involves activity in several key areas. These efforts include Membership, Programming, Community Service, Leadership Development, Recreation and Travel and Strategic Thinking and Planning. (See section on Committees for more information about these important areas.)

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Section 3

The Chapter Board of Directors

This section provides information for use by officers and other members of the chapter Board of Directors in managing the affairs of the chapter.

Additional information on the roles and responsibilities of chapter officers is provided in Section 4.

Purpose

The chapter board of directors is charged with managing the operations, property (records and miscellaneous materials), and interests of the unit. In so doing, the board ensures that all chapter affairs are conducted in a manner consistent with AARP standards and the chapter's Articles of Incorporation, Bylaws, and Standing Rules.

The board also identifies skills the chapter needs in its leaders and recruits appropriate members to serve. Focus on teamwork within the chapter board. Build volunteer committees to ease the workload for board members and help the chapter accomplish more. The chapter's effectiveness can increase if the Board creates a range of short- and long-term volunteer opportunities to get more members involved.

Board Profile

Members of the chapter board of directors are elected by the chapter membership at the annual all-member chapter business meeting. There must be at least four, and no more than twelve, members of the board of directors. The required four are the chapter President, Vice President, Secretary, and Treasurer. The remaining members of the board, if any, are elected by the chapter membership. Board members are elected and serve terms of office as provided for in the *Chapter Bylaws* and Standing Rules.

Board Members' Role

Each member of the board of directors must:

- Understand and support the goals of the chapter and AARP.
- Maintain familiarity with the concerns of chapter members and other 50+ people in the community.
- Know the resources available within the chapter, the AARP state office, the National Office, and the community.

- Work to maintain the chapter's compliance with the provisions of its Articles of Incorporation, Bylaws, Standing Rules, and the *AARP Chapter Handbook*.
- Support board members and board activity by being available to participate in regular and annual chapter board meetings.
- Identify and develop future chapter leaders.

Board Responsibilities

As the chapter's leadership team, its board of directors is accountable to the membership across three areas of responsibility: planning, policy and administration.

As the **planning body** for the chapter, the board works as a team to:

- Evaluates—on a continuing basis—the needs of chapter members and of the community.
- Collaborate with the AARP state offices and National Office to tap into available resources and align the Chapter's goals with existing strategies.
- Establishes the chapter's annual goals, which meet member needs and support priorities established by AARP.
- Assesses the chapter's progress toward achievement of its stated goals and develops plans for the future.
- Identify skills the Chapter needs in its leaders and recruit appropriate members to serve.
- Create a range of short- and long-term volunteer opportunities to accomplish the Chapter's stated goals and to get more members involved.

As the **policy body** for the chapter, the board:

- Establishes the chapter's Standing Rules.
- Approves all chapter policy positions to ensure the chapter's positions are consistent with AARP policy.
- Ensures that all legislative positions of the chapter are consistent with AARP policy.
- Resolves policy issues within the chapter using the *Chapter Bylaws*, Standing Rules, and Articles of Incorporation.

As the **administrative body** for the chapter, the board is responsible for:

- Submission of the annual report and other state/local compliance-related materials, including the chapter's annual Treasurer's, Activities' and Officer Update reports to AARP.
- Establishing a budget and maintaining accurate financial records and reports.
- Ensuring that Chapter officers, board members and committee chairperson receive the training and support needed to perform their duties.
- Approving committee plans and chapter community service and fund-raising projects.
- Approving chapter participation in other community programs and recreational activities, including special events and tours.
- Approving travel requests for chapter members on behalf of the chapter.

Board Meetings

The board participates in two types of meetings: regular board meetings (including its initial or "organization" meeting) and the annual Board meeting.

Regular Meetings

The board meets on a regular basis, (at least six times a year), to address ongoing chapter business and prepare for the business portion of the next chapter membership meeting.

- The Chapter President presides at all board meetings.
- Board meetings follow a prepared agenda.
- Board meetings are conducted according to standard parliamentary procedure outlined in *Roberts Rules of Order (Newly Revised)*.
- Committee chairpersons may be invited to attend to share information or discuss proposed plans.

The Annual Board Meeting

The *AARP Chapter Bylaws* requires that an annual board meeting be held just prior to and in preparation for the annual chapter membership meeting. The annual chapter membership meeting is for purposes of electing officers, directors, and a Nominating Committee,

as well as the transaction of such other business as may properly come before the membership.

At its annual meeting, the board of directors:

- Receives final written committee reports.
- Receives and acts upon the outgoing treasurer's closing financial report.
- Ensures that all reports required by AARP and the federal and state governments have been properly submitted.
- Reviews and disposes of all old business.
- Hears new business that requires attention.
- Ensures an orderly transition of records and responsibilities to the incoming board of directors.

The “Organization” Meeting

The first meeting of the board after officers begin their terms is known as its “organization” meeting. At this meeting, the new board of directors convenes to:

- Set the calendar for the chapter year.
- Establish and publish the meeting schedule.
- Examine any old business or tabled item.
- Begin planning and goal-setting for the new chapter year.

Additional information on organizing and conducting effective meetings is provided in Section 3 of this handbook, and a typical meeting agenda for chapter board and chapter member meetings is provided in Appendix.

Chapter Meetings – Meeting Planning and Agendas

Well planned and executed chapter meetings serve a number of valuable purposes. They provide a forum for discussions of chapter and AARP activities and are a key point of entry to a host of AARP programs. These programs can inform, educate, and motivate members to take actions that will improve their lives and life in the community at large. Meetings are also a source of fellowship and social interaction.

Through its member and board meetings, a chapter builds its reputation as an essential community organization working on behalf of people 50+ and their families. Meetings and programs reinforce the loyalty and support of chapter members and potential members and provide opportunities for members to develop their leadership skills and abilities. The identification and development of future leaders is a powerful resource in maintaining the vitality of chapter life.

Managing the Meeting

Orderly and well-paced meetings help maintain member interest and encourage participation. Getting there involves a four-step process.

1. **Prepare in Advance.** The day, time, place, and agenda for the meeting should be announced well ahead of time.
2. **Develop an Effective Agenda.** A well-designed agenda is an excellent tool for a productive meeting. Put the most important items first on the agenda to ensure priority business is covered, and set a time limit for each.
3. **Use Your Meeting Time Effectively.** Start on time and stay on track with the agenda. Ask participants to do some pre-meeting preparation, such as reviewing reports and minutes, to free up more time to conduct business.
4. **Evaluate the Meeting.** Take the time to ask board members for their input. One simple approach is to end each meeting with a five-minute exercise on two questions: What worked well at today's meeting? What could we do to improve our next meeting?

All-Member Meetings

A few key points are useful to highlight in distinguishing a meeting of the general membership from the board meeting:

- Not all chapter business covered in a chapter board meeting is appropriate for a general membership meeting. Some are too detailed or of less interest; others may be confidential. Choose your topics selectively to keep members informed and the board up to date on member interests and needs.
- In many chapters, the general membership meeting not only addresses chapter business but, includes speakers from the community and programs of interest to members. The board should work collaboratively with other chapter leaders, such as

the program committee, to plan these activities, rather than trying to do everything itself.

- Board members need to be aware, as highly visible chapter leaders, that their words and actions are noticed and can impact recruiting and retaining members. At general membership meetings, board members should strive to set a positive tone by welcoming new members, supporting and recognizing other volunteer leaders, and keeping conflicts with others as private business to be dealt with outside the public eye.

Planning the Agenda

Guidelines for planning the meeting agenda include:

- Prepare a complete agenda in advance of the meeting, including the length of time to be allotted for each item. Provide a copy for the secretary. Allow adequate time for discussion, particularly when longer reports may be necessary on timely topics such as legislation.
- Confer with the program committee chairperson. Have a clear understanding of the time needed for the guest speaker or for the special program presentation. Be ready to adjust the agenda if the program would be better presented earlier or later than customary.
- Hold to the agenda, avoiding extended discussions. Close topics diplomatically to proceed with the scheduled agenda. Invite members to remain after the meeting is adjourned to continue their discussion.
- Review parliamentary procedure in *Robert's Rules of Order* (Revised).
- Preside with ease and demonstrate interest and concern.
- Remain impartial in all proceedings.

Key Points for Successful Chapter Meetings

A few key points are useful to highlight in distinguishing a meeting of the general membership from the board meeting:

- Not all chapter business covered in a chapter board meeting is appropriate for a general membership meeting. Some items are too detailed or of less interest; others may be confidential. Choose your topics selectively to keep members informed and the board up to date on member interests and needs.

- To improve meeting attendance it is important to offer programs on topics of interest to members. The board should work collaboratively with the program committee to plan these activities.
- Board members need to be aware, as highly visible chapter leaders, that their words and actions are noticed and can impact recruiting and retaining members. At general membership meetings, board members should strive to set a positive tone by welcoming new members, supporting and recognizing other volunteer leaders, and keeping conflicts with others as private business to be dealt with outside the public eye.

Guidelines for Opening and Closing an AARP Meeting

As a nonpartisan, nonsectarian organization, AARP welcomes and recognizes members of all faiths and beliefs. AARP does not favor, uphold, or endorse any faith, sect, denomination, or system of beliefs or non-beliefs over another. It is important that volunteer leaders be aware of and sensitive to the beliefs and feelings of all attendees, and take special care to avoid inadvertently excluding any member of the group.

It is best to use an alternative to a traditional invocation or prayer, which could be offered by the officiating volunteer or by another member of the group. One alternative is the observance of a moment of silence during which individuals who wish to do so may offer their prayers, good wishes, or thanksgiving in private.

Conducting Chapter Business

A little bit of parliamentary procedure goes a long way in conducting business in an orderly and fair fashion, and members should understand and follow some basic meeting rules. In addition to the information provided below, chapters may refer to *Robert's Rules of Order* (Revised), which is available from most bookstores and in the reference section of your public library.

Officer Roles and Responsibilities

This section provides information on the critical role chapter officers play in the leading a successful Chapter.

Qualities of Chapter Leadership

The success or failure of any AARP Chapter is a direct measure of its leadership. Effective chapter leaders plan, promote, and conduct activities for all members and uphold the AARP traditions of service and caring.

Chapter officers and other board members have both the opportunity and the responsibility to guide the chapter forward, providing sound dynamic leadership to the membership and the community at large. To achieve success in this regard, the chapter and, in particular, its Nominating Committee, should devote considerable attention to identifying officers and future candidates who offer the following:

- The ability to organize the work of the chapter, delegate assignments, involve the full leadership team as appropriate, and evaluate the chapter's progress.
- The dedication to devote the time and energy to the duties and functions required of the position to which they are elected or appointed.
- The willingness to learn AARP's philosophy, policies, and practices.
- The willingness to participate in training and other learning opportunities to enhance their leadership skills.

Chapter officers must set the tone for the chapter, deal with the many levels of chapter activity, and demonstrate understanding and a willingness to unite the diversity of individuals that make up the chapter's membership. Therefore, chapter officers should also possess:

- A positive spirit
- Tact
- Listening skills
- Sound judgment
- Respect for others
- A consensus-oriented approach

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Section 4

The role of the board of directors is described in Section 3. The work of the Nominating Committee and other chapter committees is addressed in Section 5.

Chapter President

The President is the chief executive of the chapter and, subject to the direction of the board of directors, is charged with:

- Supervising the business affairs and property of the chapter.
- Presiding at all board of directors and chapter meetings.
- Carrying out the decisions, actions, and resolutions of the board.
- Appointing chairpersons for the chapter's standing committees (except the Nominating Committee).
- Serving as a member ex officio of all committees (except the Nominating Committee and the Board of Directors).
- Identifying and developing future chapter leaders.

On Taking Office

The new President becomes the steward of the chapter's official documents and any supporting files and receives an inventory of chapter assets and property. These documents include:

- *AARP Chapter Handbook*
- Current *AARP Chapter Bylaws*
- Articles of Incorporation
- Chapter Charter
- Current Standing Rules

The chapter President will need to:

- Become familiar with the content and intent of the chapter's governance documents and understand the purpose of the AARP chapter in community service.
- Learn the functions and goals within the AARP volunteer leadership structure and the state office operating structure, which serves to assist the chapter and provide a liaison between the chapter and the national AARP.
- Use the *AARP Chapter Handbook* as a primary source of information about chapter operations. Use the *AARP Chapter Handbook* as a primary source of information about chapter operations.

- Promote the chapter's development of educational and community service programs and projects, using the resources of AARP in implementing these programs.
- Keep abreast of local, state, and national legislation affecting older people and of the specific legislative goals set forth by AARP.
- Submit official chapter reports as required by AARP, state and local governments, and the AARP state office.
- Be familiar with the publications and resources available to chapter officers and committee chairpersons.
- Guide the orientation and training of officers and committee chairpersons.

Establishing Working Relationships

In establishing working relationships with the board of directors, other chapter officers, and committee members to implement the yearly schedule of meetings, programs and events, it is important that the President:

- Involve the entire membership in the activities of the chapter.
- Select committee chairpersons with care, seeking individuals best qualified to fulfill the various assignments.
- Appoint committees that are large enough to function adequately and creatively.
- Distribute the *AARP Chapter Handbook* and other appropriate information to officers, board members, and committee chairpersons.
- Delegate authority to officers and committee chairpersons rather than do every job yourself.
- Create ad hoc committees to deal with new projects and emerging community needs.
- Encourage your committee chairpersons to work with and share information with other committees.
- Maintain an inventory of the chapter's official documents and property to help ensure complete transfer of records to the succeeding President.
- Encourage committee chairpersons to maintain accurate records of their deliberations and arrange for these records to be trans-

ferred to their successors at the installation ceremony for new chapter officers.

- Be generous and sincere with compliments for jobs well done by officers, committees, and members.

The Vice President

Learning and preparing to serve as a future Chapter is the primary goal of the Vice President. The Vice President also assists the President and in that role is often assigned leadership of important chapter functions or committee work. The Vice President must be prepared to step in and perform the duties of the President in his or her absence.

Chapters frequently have more than one Vice President to handle specific responsibilities.

The Chapter Secretary

The Chapter Secretary is charged with recording the business and history of the chapter in the chapter minutes.

The Secretary also prepares and receives chapter correspondence on behalf of the Board of Directors and the chapter officers.

In large chapters where the expectation and workload of the Secretary is substantial, the chapter may consider having both a “recording secretary” and a “correspondence secretary.”

On taking office, the Secretary receives and is entrusted with safeguarding the chapter minutes and correspondence files.

Ability, dedication, and knowledge are all essential attributes of the Chapter Secretary, including the:

- Ability to organize the records of the chapter, to record assignments, and to provide information that may be used to evaluate the chapter’s progress.
- Dedication to the office of secretary and to the membership in documenting the meetings and other actions of the chapter.
- Willingness to learn AARP’s philosophy, policies, and practices in serving the President, Board of Directors, and membership at large.

See Appendix for example of meeting minutes

All chapter correspondence should be prepared on official chapter stationery using established business correspondence techniques.

Further information on the responsibilities of an organization's Secretary is available at most libraries.

The Chapter Treasurer

The Treasurer is an office of trust with many responsibilities in protecting the interests of the chapter in compliance with the Articles of Incorporation, Bylaws, government regulations and AARP policies that must be observed. The duties are exacting, but they need not be tedious. The appendix of this handbook provides accounting guidelines for use by the Chapter Treasurer in maintaining the financial records needed to prepare the required reports.

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Section 5

Chapter Committees and Their Functions

Committees play a vital role in moving the work of the chapter and AARP forward. This section provides an introduction to the chapter's key committee functions and to the roles and responsibilities of committee chairpersons and members.

General Committee Profile

- Chapters have the option of establishing standing committees: Membership, Public Relations, Legislative, Program and Community Service. In addition, every chapter must have a Nominating Committee.
- Other committees may be established as determined by the President or the board of directors.
- Committees should have a minimum of three members, who need not be chapter officers or board members.
- Chairpersons for the standing committees are appointed by the Chapter President, with the exception of the Nominating Committee. The Nominating Committee chairperson is elected by the full chapter membership; or by the members of the Nominating Committee; or by board approval, as determined by the chapter.
- Committee officers (the chairperson or co-chairperson, for example) shall hold office for a term of one year. Each officer shall hold office until a successor is elected and has been qualified.

General Responsibilities of Committee Chairpersons

- Organize the work of the committee.
- Establish a committee meeting schedule.
- Preside at committee meetings and coordinate members' tasks and schedules.
- Report to the entire chapter from time to time, either through chapter newsletters or presentations at meetings.

- Share the committee plans and project reports with the Chapter President and Board of Directors for their consideration and approval.
- Collaborate with other committee chairpersons.
- Identify and develop future leaders for the committee and the chapter as a whole.

General Responsibilities for Committee Members

- Assist the chairperson in developing a plan for the committee.
- Take on tasks and projects as assigned.
- Maintain minutes of committee meetings for the committee's permanent record.
- Represent the goals and work of the committee to the membership with energy and enthusiasm.

Membership Committee

The purpose of the Membership Committee is to build the membership of AARP and the chapter by pointing out the advantages and services available to members. The committee also receives and approves applications from individuals wishing to become members of the chapter, finds out what members want from the chapter and responds with new and creative offerings. The Membership Committee will want to create a welcoming environment for new members and potential members, hold meetings at convenient times and in accessible locations, and recognize members for their contributions to the chapter and community.

The Membership Committee has a broad involvement and a considerable impact on chapter vitality. For example, this committee:

- Shall receive and approve applications from individuals wishing to become members of the chapter and shall be alert to build the membership of AARP and the chapter by pointing out the advantages and services available to members.
- Determines, with the board of directors, a percentage increase as an annual membership recruitment goal.
- Collaborates with the Public Relations, Program, and Community Services committee chairpersons in developing comprehensive

membership promotion plans and activities involving the chapter's full resources. The Volunteer Portal at volunteers@aarp.org provides tools available online to assist in recruiting new members.

- Supervises the expenditure of funds, if any are allocated by the chapter's board of directors, for membership promotion.
- Maintains the record of members and guests at each meeting.

[Note: A chapter may specify requirements for meeting attendance in its Standing Rules. However, the chapter should remember that many who value their chapter membership cannot attend regularly due to chronic illness, lack of transportation, or other causes.]

- Maintains the chapter membership list and collects annual chapter dues.
- The chapter's membership year should be concurrent with the calendar year.
- The amount of dues to be collected must be as stated in the *Chapter Bylaws*.

[Note: Dues may be collected on an annual or semi-annual basis. The method of collection is at the discretion of the chapter and may be mailed or collected at chapter meetings. All dues must be turned over to the chapter treasurer, entered into the chapter records and books of accounts, and accurately and fully accounted for by the chapter treasurer.]

- Verifies membership eligibility in accordance with the *Chapter Bylaws*, Standing Rules, and the information provided below.

Regarding membership eligibility, any member in good standing of AARP, including those who choose to belong to the National Retired Teacher's Association (NRTA), can join an AARP chapter. In addition:

- Each chapter member must be a current member of AARP. Verification is accomplished by having new chapter members show their national membership card. The membership number must be recorded along with the applicant's name, address, and telephone number. The mailing label from *AARP The Magazine* or the *AARP Bulletin* is a satisfactory verification of membership.
- A member's spouse can also join but must pay separate dues as an individual member of the chapter. Regardless of age, the spouse

enjoys full chapter member rights, including the right to vote, hold office, and serve as a committee chairperson.

- A chapter must protect membership lists and records from release or distribution. Except as needed to facilitate chapter operations—by chapter officers, committee chairperson, appointed AARP volunteer leaders or AARP staff—the lists may not be released or published. In no instance may the list be used for commercial purposes.
- Each chapter must decide whether to establish a chapter associate membership category for AARP associate members who want to join the chapter. Associate members are those persons under 50 years of age who are associate members in good standing of AARP.
- AARP, as an organization and as an employer, values and champions the broad diversity of our membership and our workforce. Diversity has been a core value of AARP since our founding in 1958. In the words of our founder, “What we do, we do for all.” Diversity at AARP includes, but is not limited to, race, ethnicity, gender, sexual orientation, religion, disability, socio-economic status and age.
- The size of the chapter should be adequate for it to function with a full complement of officers, directors, committee members, and chairpersons.

Nominating Committee

The Nominating Committee is the centerpiece of the chapter’s critical and ongoing responsibility to sustain itself by identifying and recruiting qualified individuals as candidates for elective office.

The Nominating Committee consists of at least three members elected by the membership at the annual meeting. The method of nominating the committee members is determined by the chapter. The Nominating Committee chairperson is elected by the committee members soon after the election, by the chapter membership at the same time the committee is elected, or by appointment by the incoming board at the annual meeting.

Staggered terms are recommended and should be reflected in the chapter’s Standing Rules. Vacancies that may occur should be filled by holding a special election.

The Nominating Committee:

- Receives from the board a list of the positions to be filled at the next chapter election.
- Develops a list of prospective candidates for each vacancy.
- Talks informally with the prospective candidates to get to know them.
- Meets to review and discuss potential nominees.
- Conducts recruitment interviews with each nominee in person.
- Makes the final selection of persons to be included on the slate of officers.
- Prepares the slate of nominations to be presented.
- Presents the slate of nominations to the President, board of directors, and the chapter membership at least one month before the election.

Nominees for chapter office must be a member of both AARP and the chapter, and must agree to serve in the position.

Program Committee

The Program Committee develops and organizes all of the chapter's programs, whether the programs take place during chapter meetings or as special events in the community. The Program Committee shall ask members what kind of programs they want and arrange for stimulating and attractive chapter program presentations related to a variety of subjects and special interests. Feature guest speakers at chapter meetings on topics related to AARP's strategic issues. The Committee should coordinate its activities closely with the President, other officers and committee chairpersons.

Collaborate with organizations in the community that can offer programming on topics related to member needs and that align with AARP's mission and policy. Please contact the National Office at volunteer@aarp.org for questions that arise regarding collaborations or sponsorship of events with other organizations that might be perceived to be in conflict with AARP positions.

Members of this committee are recruited by the Program Committee chairperson. Committee members serve one-year terms, coincid-

ing with the President's term of office. Ideally, there would be one member per program or activity, but this is not a requirement.

Chapters provide three types of programs:

Chapter Meeting Programs are brief, 15-20 minute presentations included as a part of the regular chapter meeting. These programs are designed to inform chapter members about a wide variety of topics. The presentation may be by a guest speaker or a chapter member with knowledge of the topic.

Member Education Programs include workshops or seminars scheduled either in conjunction with the chapter meeting or at another convenient time. They require 60-90 minutes or more to provide in-depth education on topics of importance to members.

Community Programs are workshops, seminars, or other events sponsored by the chapter for the public. These programs have the added element of providing opportunities to work with the Membership, Public Relations, and Community Services committees to create interest in becoming members of the chapter.

Possibilities for the various programs are endless. The Program Committee is limited only by its imagination. Resources available to assist the committee in identifying subjects and program opportunities include:

- Your AARP state office and AARP's website (www.aarp.org)
- Area agencies and associations
- Community directories
- Newspapers and community events calendars

In fulfilling its mission, the Program Committee:

- Organizes and schedules speakers and program topics for the year.
- Follows the guidelines included in the *AARP Chapter Bylaws* when planning these programs. These Bylaws state that:
 - The chapter "...shall not independently arrange for, or offer to chapter members, any commodities or services already offered by AARP to its members..."
 - "Neither the chapter nor any committee, subdivision, director, officer, agency, representative, or employee of the chapter shall permit or suffer to hold himself or herself out as an agent or

solicitor of any service offered by AARP to its members, including but not limited to insurance, travel, pharmaceuticals, or any other service or commodity.”

- Presentations by outside organizations must be educational and general in nature. They cannot involve specific product or service recommendations, marketing, or other commercial efforts by one or more vendors, or campaigning by political candidates or individuals personally running for public office of any kind. If the chapter wishes to highlight a local or state election of interest to its members, it must invite all candidates for the office to participate.

The committee:

- Surveys the membership and works with other committees to identify and stay in touch with their needs and interests.
- Maintains a resource book containing items helpful to planning chapter programs.
- Determines the appropriate length of each program and time of presentation.
- Works with the chapter’s treasurer to develop a budget for the year’s programs.
- Ensures programs are held in accessible locations.

Legislative Committee

The purpose of the Legislative Committee is to advance AARP’s philosophy and goals by supporting the legislative and advocacy interests of AARP members at the community, state, and federal levels. The efforts of the Legislative Committee should help improve the quality of life for people 50+ while providing members meaningful opportunities to participate in contemporary life.

The Committee shall monitor legislative activities and represent the opinion of the chapter membership at public hearings and with public officials, in compliance with AARP policies and, as appropriate, in consultation with the AARP state office

Important Notes

- **Conflicts of Interest:** Legislative Committee members must always appear objective and nonpartisan in their advocacy efforts. Therefore, they must avoid all conflicts of interest or even the

appearance of a conflict. This means not advocating for AARP at the same time the member is actively supporting (on his or her own time) a candidate for political office. Members can benefit from the guidance of their state office in regard to potential conflict situations.

- **Lobbying Requirements:** Each state and the District of Columbia have laws requiring the registration of lobbyists and the filing of lobbying expense reports. Many state lobbying laws exempt volunteers. Lobbying is generally defined as the influencing of legislation or agency action. Some definitions encompass not only formal lobbying, such as testifying before a legislative committee, but informal contacts as well. Nonetheless, volunteers who are heavily involved in promoting legislation or executive action during the legislative session should check with the state office about the need to register or file reports.

Guidelines for Legislative Committee activity

- **National and State Issues:** All issues at the federal and state levels that are supported by a chapter and its Legislative Committee must be consistent with AARP national policy as established by its Board of Directors upon recommendation of the National Legislative Council. Chapters are only permitted to work on federal and state issues that are included in the Policy Agenda or other official AARP documents provided by the state office or AARP.
- All chapter Legislative Committee activities must be nonpartisan.
- The Legislative Committee chairperson maintains a close working relationship with the state office to ensure that the chapter focuses on state and national priorities.
- Individual chapter leaders and members are encouraged to vote and to privately support the candidates and political party of their choice. They must ensure, however, that their personal preference is not confused with formal chapter endorsement.
- **Local Issues:** Chapters can take stands, consistent with AARP's mission and policy, on community issues and attempt to educate and encourage local officials to adopt and implement action. A consultation with state office staff should take place to ensure the appropriate interpretation of the legislative and regulatory poli-

cies of AARP and to gain additional guidance on strategy and techniques for reaching agreement with local government officials.

- The committee surveys the chapter membership to determine which local and state issues to address. Consults with state office staff to ensure consistency with the AARP Policy Agenda.
- Studies issues and develops a plan of action before presenting it to the chapter's board of directors for approval.
- Studies the local issues and selects those that are consistent with AARP policies to be placed on its agenda.
- Presents the issues to the chapter's board of directors for approval and to the chapter membership for ratification.
- Ensures chapter members respond quickly and appropriately to federal and state legislative alerts.
- Organizes the chapter legislative telephone network.
- Maintains regular, personal contact with elected representatives, public officials, and other lawmakers.

Legislative Telephone Network

The chapter Legislative Email Telephone Communication Network is an effective communications tool. When "time is of the essence" in relaying messages to members and legislators, a communication network has great advantages.

In order to work effectively, the communication network must have:

- Participants who keep up to date on the current legislative priorities and are willing to make telephone calls, write letters, or visit legislators when needed.
- A specifically identified individual assigned to initiate the telephone network and receive reports back.
- A clearly designed progression for the telephone calls, with no more than four or five levels in the network and with each participant limited to making no more than three calls.
- Short, clear messages. For example: "Call Senator Ourstate at 938-4082 and say, 'Vote yes or no on Senate Bill 432, name of bill.'"
- A feedback loop to check the quality of the message that was sent.
- At least one trial run prior to the opening of the legislative sessions.

- A method for passing the message back to the chapter should a legislator or staff member respond substantively.

Community Services Committee

The Community Service Committee leads the chapter effort to identify and respond to essential social needs in the community. The focus of the committee, however, is not only to address community needs but also to provide meaningful and rewarding volunteer opportunities for the membership in the process. The Community Service Committee shall identify essential social needs or projects in the community and stimulate appropriate chapter use of resources to meet the needs or assist the projects.

By promoting community service, the chapter achieves visibility in the local community and embodies the AARP motto, “To serve, not to be served,” all of which reinforces the chapter as AARP’s dynamic presence at the local level.

Identify service opportunities that match up with AARP’s strategic issues, offer meaningful experience, and reflect the membership’s skills and interests. Talk with leaders of community organizations serving the 50+ population to learn of their needs and ways the chapter can help.

The Community Service Committee develops and submits to the chapter’s board of directors for approval a proposed plan for programs and projects the chapter will conduct throughout the year. Part of the chapter’s service work will include responding to the community outreach efforts of other organizations.

While chapters select from a wide range of possibilities, community service projects usually fall into one of three broad, overlapping categories.

1. **Service Programs** make needed services available to the community, either on a one-time or ongoing basis. These could include food pantries, soup kitchens, book drives, and health fairs, as well as mentoring programs.
2. **Direct Assistance Programs** provide much-needed aid to assist individuals in maintaining their independence. These include transportation programs and friendly visits, as well as taking on shopping or household chores.

3. **Educational Programs** offer up-to-date information on topics of interest to people 50+ and to the community at large. These include programs providing information on what to look for in an insurance plan or retirement home, as well as advice for caregivers or grandparents raising children.

Prime consideration should be given to the menu of community service options available through AARP, including:

- AARP annual Day of Service
- The Create The Good Toolkits and national database of volunteer opportunities, available through the CreateTheGood.org website
- AARP State Office
- AARP Driver Safety
- AARP Foundation Tax-Aide
- AARP Senior Community Service Employment Program

Information on these and other AARP and AARP Foundation programs is available from your state office and by visiting the AARP website at www.aarp.org.

Some important notes about fundraising. When engaging in an activity, remember:

- It must be legal. Every fundraising project must be approved by the chapter's board of directors and must conform to local and state laws.
- It may be taxed. Generally, chapters are not exempt from state sales taxes. Chapters must submit required payments to their state revenue office.
- It is not tax-deductible. Monetary and non-monetary donations to the chapters by individuals are not tax-deductible to the donor. However, corporations making donations should be notified that since donations may be deductible as business expenses, they should check with their tax advisors.

An important note on grant-seeking: Chapters may not qualify for certain opportunities. AARP chapters are organized as a social welfare organization Section 501(c) (4) of the Internal Revenue Code. Such organizations are not eligible to apply for grants reserved for "charitable organizations" created under Section 501(c)(3). Prior to pursuing

or applying for a grant, chapters must seek guidance from their state offices.

Public Relations Committee

The Public Relations Committee can provide valuable support for the work of the chapter, its committees, and the state office by assisting in the development and implementation of activities designed to:

- Publicize in the community the purposes, goals, roles, activities, and projects of AARP.
- Keep the members informed and involved in the chapter's activities.

Professional experience in the area of communications is helpful, though not required. Commitment and creativity are important, however. Public Relations Committee members, particularly the chairperson, should be thoroughly familiar with chapter activities and the wealth of talent among the membership—artists, writers and speakers—as well as folks who can type or run a computer, handle audiovisual equipment and other needed chapter services. All participating members should be willing to learn to work with media people and information outlets and seek guidance from their state office when needed.

The Public Relations Committee is charged with:

- Knowing the media outlets in the chapter's area.
- Identifying public relations opportunities for the chapter.
- Providing information about the chapter and AARP by telling the Who, What, Where, When, Why and How.
- Answering questions posed by editors and reporters, such as "Why is this news?"
- Answering questions posed by the audience being addressed, such as "What's in it for me?"
- Coordinating the publication of the chapter newsletter.
- Coordinating chapter displays at community events, fairs, festivals, homecomings and other public gatherings.
- Maintaining chapter displays in community facilities such as libraries, senior centers or shopping malls.
- Coordinating the chapter's speakers' bureau, if there is one.

- Maintaining the chapter's media scrapbook, which serves as a record of the public history of the chapter and provides background information for future news releases.

Health Committee

The Health Committee, working with the Program and Community Service committees, shall be alert to relevant information and identify appropriate opportunities for improving member and community awareness of, and engagement in, healthy living behaviors and activities.

Recreation and Social Activity Committee

The Recreation and Social Activity Committee is responsible for carrying out recreational and social activities that are important to member involvement and fellowship in the chapter.

Chapters may choose to establish optional committees to plan and carry out specific recreational and social activities for chapter members. The role and function of such committees must be included in the chapter's Standing Rules.

Key committee member roles include:

- A recorder, a person who records the work and actions of the committee. *[Note: All committee finances must be deposited with the chapter treasurer and must be recorded in the chapter financial records.]*
- Registrars, who receive registrations, collect monies and deposit them with the treasurer.
- Planners, who work out the details of a tour, event, dinner, or other activity after the board has given its approval.

This committee reports to the board of directors and must receive approval before entering into any legal obligation on behalf of the chapter (e.g., engaging a tour agent or contracting for an event at an outside facility).

Liability Insurance

AARP Chapters are required to maintain liability insurance to protect its officers and members from civil litigation, associated with activities sponsored by your Chapter.

We can help out: AARP through its insurance broker has arranged a group purchase of general liability insurance for Chapters at a substantial discount. What does the insurance cover you ask? The Chapter liability insurance covers all operations sponsored by the Chapter that might result in a claim involving bodily injury or property damage to a second party. This insurance, of course, does not provide any medical coverage for Chapter members, since most likely they have private or Medicaid coverage.

Chapter Tours with Buses

Chapters who hire bus companies for tours present a unique liability challenge you need to consider when organizing such an event. We recommend the following: a) Make sure the bus company operator has appropriate auto/general liability insurance; b) Have the Chapter be named, as an additional insured on their policy; and c) Make sure you receive a certificate of insurance that verifies your request for the coverage.

Recreational Activity Fees

Whenever possible, tour and other recreational activity fees should be paid directly to the tour company or other provider. In fact, some states require that fees for tours be paid directly to the tour company by the persons participating in the tour. In addition, some states may require a fidelity bond, if the chapter is going to collect tour fees or other recreational activity monies. Check with the Secretary of State or Attorney General's Office in your state to determine how non-profits may be required to handle monies received for tours and other recreational activities.

All checks written for Chapter tours and recreational activities must be approved, as stated in item 16 of the Standing Rules.

[Note: The AARP Chapter Bylaws suggest that if the chapter funds on hand from any source exceeds \$1,000 a month, the chapter should obtain bond for the discharge of duties of chapter officers authorized to sign checks and drafts.]

Certificate of Insurance

For bus tours, bus company liability coverage is only in effect while the tour group is on the bus. A Certificate of Insurance may be obtained from the bus company before the group travels. The Certificate must show the amount of insurance coverage provided,

policy date, and the name of the insurer.

Disclaimer Statement for Tour Events

Announcements and advertising concerning Chapter bus tour events, and activities must contain the following required legal disclaimer statement:

“This tour is a project of and is offered to the (insert chapter name and number) of AARP. (Chapter name and number) and any agent it may use in arranging this or any other tour are not responsible; in whole or in part, to the tour member for any loss, damage, or injury, whether financial or otherwise, to persons or property; however caused during or in connection with this or any other tour. This tour is an activity offered by (insert chapter name and number); and is in no way offered, sponsored, or conducted by AARP, and thus, AARP has no legal responsibility in connection with this tour event.”

Gratuities

No member or group of members of the chapter may profit financially from any monies, assets, or activities of the chapter. For example, free meals, free trips, discounts, complimentary rooms and other gratuities can-not be accepted by members of the Tour Committee or the chapter members. The mention of “discounts” in this section does not prohibit chapters from using a standard group discount rate that is available to the general public.

Chapter dues may not be used to subsidize re-freshments, tours, or other social events. These and similar activities must be self-supporting.

AARP in the 21st Century: An Ongoing Tradition of Service

Built on a history of understanding, representing, and meeting the needs of its membership, AARP continues to adapt and grow as an organization. Part public policy advocate, part educator, part community servant, AARP today is all about shaping and enriching the experience of aging for each member and for society at large. As a direct link to the local community, AARP chapters remain well positioned to play a vital role in the AARP's ongoing success.

Tradition alone, however, cannot guarantee tomorrow's achievement. It is useful to recall the words of no less a visionary than Henry Ford, who in 1916 said, "History is more or less bunk. It's tradition...We want to live in the present, and the only history that is worth a tinker's dam is the history we make today."

AARP is a nonprofit, nonpartisan organization, with a membership of more than 37 million, that helps people turn their goals and dreams into real possibilities, strengthens communities and fights for the issues that matter most to families such as healthcare, employment security and retirement planning. We advocate for consumers in the marketplace by selecting products and services of high quality and value to carry the AARP name as well as help our members obtain discounts on a wide range of products, travel, and services.

Diversity—By the year 2025, 30% of the 50+ population will be of diverse ethnic and cultural backgrounds. In order for our information, products, and services to be viewed as valuable by diverse audiences, we need to reach out to these groups in ways that are meaningful to each.

Boomers—Boomers are both similar to and different from previous generations. Understanding and responding to their needs will be a critical component of our work going forward.

Life Stage—People also differ because of the life stage they are in and the life experiences they have had. We will need to take these different needs and interests into account as we plan and deliver products and services.

Vulnerable Populations—Our commitment to diverse populations demands nothing less than full attention to meeting the needs of

A

Appendix A

those who may be less able or have fewer resources—the frail, the isolated, and the low income.

Consumer Advocacy—AARP will retain a consumer perspective in deciding what issues to address and what role we should play in seeking to improve the responsiveness of markets and industries.

Strengthening Alliances—In our complex world of such pervasive and challenging issues, no one organization can do it all.

We will play a leadership role in establishing the relationships necessary to achieve positive change in the public, private, and independent sectors.

Throughout our history, AARP has initiated, developed, and reinvented programs to meet the needs of a changing America, and now is no different. In delivering on our strategic plan, however, our core values and tradition of service remain constant. As AARP leaders, members, employees, and volunteers we:

- Strive for excellence in all that we do. We are responsible for and committed to meeting members' needs through timely delivery of high quality education/information, products, and services.
- Believe in the strength and quality of AARP people—our volunteers and employees working in partnership—and we are dedicated to their further growth and development. We continually support and recognize their invaluable contributions to our members and society.
- Share leadership responsibility for achieving our vision. Together, we communicate desired goals, facilitate and support decisive action, and encourage innovation.
- Expect all interactions between AARP members, volunteers, employees, organizational partners, the media, policy makers, regulators, and the general public will be characterized by integrity, honesty, and mutual respect.
- Recognize and respect the diversity of needs, interests, and contributions of all members, volunteers, and employees.
- Seek the greater good for all society, understanding that as a social welfare organization we have a strong commitment to encourage social responsibility in all our actions.

The AARP State Structure

AARP's structure is designed to partner members, chapters, trained volunteers, and staff in an integrated approach to meeting the needs of the organization, its constituents, and the public as efficiently and effectively as possible. Each element of the team lends strengths and resources to the work of all. Key field volunteer leadership positions include the following.

- **Regional Volunteer Director:** In partnership with the Regional Vice President, the Regional Volunteer Director (RVD) is responsible for providing leadership and guidance to all volunteers and staff served by one of the six AARP Regions. The RVD is also responsible for articulating the needs of the volunteers and members to the regional office and National Office and serves as a member of the States and Communities Leadership.
- **State President:** In partnership with the State Director and in collaboration with other appropriate volunteers and staff, the State President positions AARP in the state to achieve the AARP vision, mission, and strategic priorities. The State President is the volunteer spokesperson for AARP in each state.
- **Executive Council:** The Executive Council (EC) is a team of volunteer leaders who bring a variety of skills, experiences and backgrounds to this state leadership team. The Executive Council works to establish the state's strategic priorities and objectives consistent with AARP's national strategic framework and within AARP's policies. The AARP Board of Directors sets policy, the EC provides advice and strategic input. The EC is comprised of the State President, the State Director, and additional volunteers.

B

Appendix B

Chapter Reporting Calendar

January

- All AARP Reports due to the Office of Volunteer Engagement by January 31.
- Nominations for the AARP Chapter and Unit Community Service award due to the Office of Volunteer Engagement by January 31.
- Chapters should check with the Secretary of State or appropriate state agency to ensure corporate status is active and in good standing.

Call Office of Volunteer Engagement regarding question about state compliance status or check with the local state corporation agency. 1-866-740-7719

April–May

- Insurance applications mailed to the Chapter Treasurer. Policy period starts June 1 of each year.

November

- AARP annual Chapter reports mailed to Chapter Presidents.

Reminder: AARP Chapter forms and reports are available online through the AARP Volunteer Portal volunteers.aarp.org.

AARP Chapter Bylaws

AARP CHAPTER BYLAWS

(Revised 1977, Amended 1989, Revised 2010, Revised 2012)

The *AARP Chapter Bylaws* provide guidance on chapter operations and functions and provide for chapter compliance with IRS regulations. Additional information on chapter governance and operations is provided in the *AARP Chapter Handbook*.

ARTICLE I—OFFICES

The principal office of the chapter shall be located at an address to be designated by the chapter, and it may be the residence of an officer.

ARTICLE II—PURPOSE

The chapter is a community of service whose purpose is to promote at the local level the priorities, programs and policies of AARP, a District of Columbia Nonprofit Corporation. In particular, Chapters are created to:

- Maximize member engagement in a broad menu of community service, information and educational activities and experiences;
- Add value for members by maximizing their opportunities for self-realization, personal growth and life-enriching fellowship and support;
- Demonstrate the contributions and potential of people 50+ Americans, encouraging their full participation in contemporary life and stimulating public interest in their issues.

ARTICLE III—MEMBERS

Section 1: Classes and Dues

There shall be three classes of members of the Chapter: individual, national organization and associate.

- a. Individual members shall be persons
 - i. who are members in good standing of AARP, their spouses or members in good standing of the National Retired Teachers Association (hereinafter NRTA) and
 - ii. who pay in advance the annual chapter membership dues of \$_____.
 - iii. Failure of any individual member to maintain membership in

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good standing in AARP shall automatically result in the termination of such individual's membership in the chapter and such individual's spouse's membership, when based on such individual's membership.

- b. The national organization members shall be AARP.
- c. Associate members of the chapter shall be any associate members in good standing of AARP who care to join. Associate members of the chapter shall have the same rights as individual members, including the right to vote and hold elective office, and shall be subject to the payment of dues. The term "individual member" as used in these Bylaws shall be deemed to include associate members.

Section 2: Voting Rights

- a. Each individual member shall be entitled to one vote on each matter submitted to a vote of the members.
- b. Except as otherwise provided in Article IX of these Bylaws, the national organization member, AARP, shall have the right to vote on each matter submitted to a vote of the members relating to
 - i. the amendment of the Articles of Incorporation or Bylaws of the chapter,
 - ii. a liquidation, dissolution, merger or consolidation involving the chapter, and
 - iii. the sale, exchange, mortgage, pledge, or other disposition of all, or substantially all, the assets and property of the chapter.

The affirmative vote of the national organization member shall be necessary to decide any matter upon which the national organization member is entitled to vote.

ARTICLE IV—MEETINGS OF MEMBERS

Section 1: Regular Meetings

Regular meetings of the chapter shall be held on such dates as shall be determined by the board of directors of the chapter and announced to the individual members at a chapter meeting.

Section 2: Annual Meetings

The annual meeting of the members of the chapter shall be held in the month of ____ beginning with the year ____ on a date and at a time and place determined by the board of directors, for the purpose of electing officers, directors, a nominating committee and the transac-

tion of such other business as may properly come before the meeting.

Section 3: Special Meetings

Special meetings of the members may be called at any time by the President and shall be called by the President or the Secretary at the written request of a majority of the board of directors or officers or at the request in writing of a majority of the individual members.

Section 4: Place of Meetings

All meetings of members shall be held at the principal office of the chapter or at such other place as the board of directors may select and designate in the notice of such meeting.

Section 5: Notice of Meetings

Written notice of the annual and special meetings of members, stating the purpose for which the meeting is called and the time and place it is to be held, shall be delivered either personally or by mail, email, phone, fax, or nationally recognized overnight courier to each member entitled to vote at such meeting, not less than 10 days before any special meeting and not less than 30 nor more than 50 days before any annual meeting. Notice shall be sent to the national organization member, AARP, at its office in Washington, DC, for meetings where the purpose for which the meeting is called is a matter upon which the national organization member is entitled to vote in accordance with Article III, Section 2, of these Bylaws; and for any meeting called after recognition of the chapter has been withdrawn or suspended in accordance with Article IX of these Bylaws.

Section 6: Quorum

The presence in person the majority of the members entitled to vote at such meeting shall constitute a quorum for the transaction of any business. If a quorum is not present at any meeting of members, a majority of the members present may adjourn the meeting without further notice.

Section 7: Voting

- a. Except as otherwise provided in these Bylaws, the vote of a majority of the individual members present and entitled to vote on matter at a meeting at which a quorum is present shall be necessary for the adoption thereof.
- b. Each individual member entitled to vote may vote only in person. The national organization member, AARP, may vote in person or

by written proxy. Such proxy shall be exhibited to the Secretary at the meeting and shall be filed with the records of the chapter.

ARTICLE V—BOARD OF DIRECTORS

Section 1: Number, Election, and Term of Office

- a. The number of directors of the chapter, including the officers listed in (b) below, shall be in proportion to the overall size and needs of the chapter and shall consist of not less than four nor more than 12 as shall be determined by the board of directors prior to the chapter meeting that receives the report of the Nominating Committee.
- b. The following officers of the chapter shall be directors for a term coterminous with their respective terms of office: President, Vice President, Secretary and Treasurer.
- c. The remaining members of the board of the chapter shall be elected from among the individual members in good standing of the chapter by the vote of a majority of the members present in person and entitled to vote at the annual meeting of the members or as hereinafter provided. Each director shall hold office for a one-, two- or three-year term, as determined by the chapter, except that in no case shall a director serve more than two consecutive terms or hold that office for a total of more than six consecutive years.
- d. Board members may not hold more than one elected position with the chapter or serve in an elected position at more than one chapter simultaneously.
- e. Any board member may be removed from office by a two-thirds vote of the chapter members present whenever, in its judgment, the best interests of the chapter or AARP would be served thereby.

Section 2: Duties and Powers

The board shall be responsible for the control and management of the affairs, property and interests of the chapter; for keeping the national organization member informed of all activities of the chapter; for complying with all reporting requirements of the national organization member; for guiding the chapter so that the various provisions of the Articles of Incorporation, including the purposes for which the chapter was organized set forth therein, are complied with; and for making recommendations and suggesting programs.

Section 3: Annual Meetings

The meeting of the board of directors just prior to the annual meeting of the chapter members shall be considered the annual meeting of the board.

Section 4: Other Meetings

Other meetings of the board shall be held at least six times each year as scheduled or when called by the President or by one-third of the number of directors, at such time and place as may be specified in the notice thereof.

Section 5: Notice

Notice of any meeting of the board of directors shall be given at least five days in advance, delivered personally or sent by mail, email, phone, fax or nationally recognized overnight courier to each director at his/her address as it appears on the records of the chapter. If mailed, such notice shall be deemed to be delivered when deposited in the United States mail in a sealed envelope so addressed with postage thereon prepaid.

Section 6: Quorum and Voting

A majority of the directors then in office shall constitute a quorum for the transaction of business, and the act of a majority of the directors present at any meetings at which there is a quorum present shall be the act of the board of directors, unless the act of a greater number is required by law or by these Bylaws.

Section 7: Vacancies

Any vacancy occurring in the board of directors shall be filled, for the unexpired portion of the term, by a majority vote of the remaining directors though less than a quorum.

Section 8: Absence from Meetings

Any member of the board who shall be absent from three consecutive meetings without adequate excuse acceptable to the board shall be deemed to have resigned from the board.

ARTICLE VI—OFFICERS

Section 1: Officers

The officers of the chapter shall be a President, one or more Vice Presidents, a Secretary, a Treasurer, and such other officers as the board may from time to time deem advisable.

Section 2: Election, Term, Vacancies, and Removal

The officers of the chapter shall be elected by the members at the annual meeting of members. The officers shall hold office for a term of one, two or three years at chapter option, except that in no case shall an officer serve more than two consecutive terms or hold that office for a total of more than six consecutive years. A vacancy in any office shall be filled by the board, subject to approval of the members. Any officer may be removed from office by a two-thirds vote of the chapter members present whenever, in its judgment, the best interests of the chapter or AARP would be served thereby.

Section 3: President

The President shall be the chief executive officer of the Chapter and, subject to the direction of the board of directors, shall supervise and control all of the business, affairs, and property of the Chapter and shall see that all orders and resolutions of the board are carried into effect. The President shall preside at all meetings of the members and of the board and shall appoint all chairpersons of committees, except the chairperson of the Nominating Committee. The President shall by virtue of the office be a member of all committees except the Nominating Committee.

Section 4: Vice President

In the absence of the President or in the event of an inability or refusal to act, the Vice President (or, in the event there be more than one Vice President, the Vice Presidents in the order designated) shall perform the duties of the President and, when so acting, shall have all the powers of and be subject to all the restrictions upon the President. The Vice Presidents shall perform such other duties and have such other powers as the board may from time to time prescribe.

Section 5: Secretary

The Secretary shall record all the proceedings of the meetings of the board and of the members in a book to be kept for that purpose and shall perform like duties for the board of directors when required.

The Secretary shall give or cause to be given notice of all meetings for which notice is required by these Bylaws and shall perform such other duties as may be prescribed by the board or President, under whose supervision the Secretary shall be. If required by the law of the state of incorporation, a corporate seal for the chapter shall be obtained. The Secretary shall have custody of such seal, and the Secretary or an assistant Secretary shall have authority to affix the same to any instrument requiring it, and when so affixed it may be attested by the signature of the Secretary or by the signature of such assistant Secretary. The board may give general authority to any other officer to affix the seal of the chapter and to attest the fixing by that officer's signature.

The assistant Secretary, if there be one, shall, in the absence of the Secretary or in the event of an inability or refusal to act, perform the duties and exercise the powers of the Secretary and shall perform such other duties and have such other powers as the board may from time to time prescribe.

Section 6: Treasurer

The Treasurer shall have charge and custody of all funds and securities of the chapter and all funds or securities in any way generated, collected or obtained in connection with chapter activities, and the Treasurer shall be responsible for such funds and securities and the receipt and disbursement thereof.

The Treasurer shall keep full and accurate accounts of receipts and disbursements in books belonging to the chapter and shall deposit all moneys and other valuable effects in the name and to the credit of the chapter in such depositories as may be designated by the board.

The Treasurer shall disburse funds of the chapter as may be ordered by the board, taking proper vouchers for such disbursements, and shall render to the President and the board at its annual meeting, or when the board or the President so requires, an accounting of all the Treasurer's transactions and of the financial condition of the chapter, and a full financial report, based on the books and the accounts audited annually by a certified or other public accountant, or an auditing committee.

The assistant Treasurer, if there be one, shall, in the absence of the Treasurer or in the event of an inability or refusal to act, perform the duties and exercise the powers of the Treasurer and shall perform

such other duties and have such other powers as the board may from time to time prescribe.

Section 7: Checks and Bond

The President, Vice President, Treasurer, or any other officer designated by the board shall be authorized to sign checks and drafts. When the average amount of chapter funds on hand at month-end exceeds \$1,000, the chapter's board of directors should determine whether having a fidelity bond is a necessary component of the chapter's procedures for accountability and safeguarding of chapter funds.

ARTICLE VII—COMMITTEES

Section 1: Nominating Committee

The Nominating Committee shall consist of at least three members elected by the membership or appointed by the incoming board at the annual meeting. The Committee shall prepare a slate of officers and directors and submit the list for consideration by the chapter members one month prior to the election. The method of nominating the Committee members is determined by the chapter.

Similarly, the Committee chairperson may either be elected by the membership, or appointed by the incoming board or the Committee members themselves.

Section 2: Standing and Other Committees

The chapter has the option of establishing standing committees such as Membership Committee, Public Relations Committee, Legislative Committee, Program Committee, Community Services Committee, Health Committee and other committees. The President has the option of appointing a chairperson for each of the standing committees that the President deems desirable. The members of such committees shall be individual members of the chapter, but need not be officers or directors, appointed by the chairperson of such committee.

Section 3: Term

- a. The members of the Nominating Committee shall serve a one-, two- or three-year term of office, at chapter option.
- b. The members of the Standing and other committees shall serve for a term terminating at the annual meeting of members when the term of the President who appointed the chairperson of the respective committee terminates.

ARTICLE VIII—CHAPTER RESTRICTIONS

AARP and the chapter are, and are intended to remain, independent organizations devoted to furthering the interests of people 50+ and to carrying out the purposes set forth in Article II of these *AARP Chapter Bylaws*. The chapter's activities shall be conducted with the utmost observance of ethical standards and propriety of conduct.

The provisions of the *Chapter Handbook* (and all attachments thereto), as in effect from time to time, and any successor thereto, are hereby incorporated by reference into these Bylaws. The chapter shall not independently arrange for or offer to chapter members any commodities or services already offered by AARP to its members. Such activities, if carried on by the chapter, would diminish the strength of the national AARP, whose responsibility to the total membership the chapter must support.

Neither the chapter nor any committee, subdivision, director, officer, agent, representative or employee of the chapter shall permit or suffer or hold himself or herself out as an agent or solicitor of any service offered by AARP to its members, including but not limited to insurance, travel, pharmaceutical or any other service or commodity.

ARTICLE IX—WITHDRAWAL OF CHAPTER RECOGNITION AND DISSOLUTION

The chapter shall be organized and operated in conformity with the purposes set forth in Article II of these *AARP Chapter Bylaws* and the policies and standards formulated by AARP. AARP may withdraw or suspend recognition of the chapter as a local chapter of AARP for:

- i. recurrent failure to conform to the policies and standards of AARP;
or
- ii. a failure of the chapter to comply with any of the provisions contained in the Articles of Incorporation of the Chapter or these Bylaws; or
- iii. a failure to remain in compliance with the laws or regulations of the state in which the chapter is incorporated.

Such recognition shall be withdrawn or suspended only after investigation of the situation by AARP. Withdrawal or suspension of recognition shall become effective immediately upon the decision by AARP. In the event recognition is withdrawn or suspended, the chapter shall have an opportunity to be heard by AARP.

In the event recognition is withdrawn or suspended, all funds and other property held by the chapter shall be paid over to AARP to be distributed to AARP Foundation, charitable foundations sponsored by AARP or for other charitable purposes at the discretion of AARP. In addition, notwithstanding any other provisions of the Articles of Incorporation of the Chapter or these Bylaws to the contrary, after withdrawal or suspension of recognition, all voting rights shall thereafter be vested solely in AARP, the national organization member. The voting rights that would otherwise be vested in the individual members shall thereupon cease, and AARP shall thereupon have the right to remove any officer or director, with or without cause, at any time.

Upon the withdrawal or suspension of its recognition, the chapter shall not, without the express written consent of AARP, conduct its affairs or otherwise identify or hold itself out to the public as a local chapter or other affiliate of AARP.

Where the law of the state of incorporation of the chapter permits, AARP, the national organization member, may at its discretion legally dissolve a chapter after its recognition has been withdrawn or after a chapter has otherwise voluntarily dissolved.

ARTICLE X—RELATIONSHIP WITH OTHER ORGANIZATIONS OR ASSOCIATIONS

Holding office or being a director in another organization or association whose objectives and purposes are similar or related to those of AARP may lead to conflict with the responsibilities to the chapter and to AARP of a chapter officer or director. To avoid such conflict, a chapter officer or director shall first obtain consent of the chapter and of AARP (expressly or through written policy) to such service in another organization or association. Failure to comply with the provisions of this article shall be deemed the equivalent of and shall constitute the resignation of such person as an officer or director of the chapter.

ARTICLE XI—RULES OF ORDER

All proceedings of the chapter shall be governed by *Robert's Rules of Order Newly Revised* except when in conflict with these Bylaws.

ARTICLE XII—AMENDMENTS

The individual members shall have the power to amend, with the approval of AARP, the national organization member, those portions of these Bylaws that establish annual chapter membership dues, the month in which the annual meeting of members of the chapter will be held and the quorum required for the transaction of business at any meeting of members. Other provisions of these Bylaws may be amended only when such amendments are proposed by AARP. Each proposed amendment of these Bylaws shall be approved by the affirmative vote of two thirds of the individual members of the chapter present and entitled to vote at a special meeting of the members called for such purpose in accordance with Article IV, Section 5 of these Bylaws. After approval by the individual members, the full text of the proposed amendment shall be submitted in writing to AARP, for its approval, at its office in Washington, DC. The proposed amendment of these Bylaws shall be effective upon the written approval thereof by AARP.

Adopted the _____ day of _____, _____
(month) (year)

Signed by: _____
Chapter President

Chapter Model Standing Rules

“Standing” rules are supplemental regulations established by the chapter to define procedures for operations not specified in the *AARP Chapter Bylaws*, *Articles of Incorporation*, or the *Chapter Handbook*. For example, a chapter may wish to establish standing rules governing chapter auditing procedures or the reimbursement of volunteers’ expenses. Standing Rules are recommended and can be modified to meet Chapter needs.

Additional information on chapter governance and operations is provided in Section 1 and Section 2 of this handbook.

Chapter Model Standing Rules

NAME AND ADDRESS

1. The name of this chapter is _____ (insert full name and, if already incorporated, the chapter number).
2. The official address of this chapter is that of the current President, unless the chapter uses a Post Office Box, in which case the address is _____ (if applicable, insert P.O. Box and address).

MEMBERS AND DUES

3. The maximum number of members, including associate chapter members, is _____ (insert unlimited or the maximum number, as may be determined by the capacity of the meeting space used by the chapter).
4. Annual dues are _____ (enter the same amount for dues as shown in your *Chapter Bylaws*).
5. Persons joining the chapter in the last _____ (enter half, or quarter, or number of months) of the membership year shall pay prorated dues for the rest of that year only.
6. Associate members will pay the same dues as other members.
7. This chapter _____ (will/will not) accept as members those who are members of any other AARP chapter.

D

Appendix D

MEETINGS

8. The chapter will meet _____
_____ (Include meeting time, day, and week of the month; months when no meetings will be held; and include the name and address of the facility where the meeting will be held.)
9. The chapter board of directors will meet _____
_____ (Include meeting time, day and week of the month; months when no meetings will be held, and include the name and address of the facility where the meeting will be held.)
10. Non-members may attend _____ (enter number) chapter meetings as guests before joining.
11. Members must attend _____ (enter a number) chapter meetings each year to maintain active membership. Membership will not be dropped if a person fails to attend the minimum number of meetings due to illness, extended travel, or other causes deemed valid by the board of directors.
12. The annual meeting of the chapter will be held in _____ (insert month) at the chapter's regular meeting place and regular meeting time.

OFFICERS

13. This chapter will have the following additional officers. (These additional officers do not automatically serve on the board of directors unless—in a subsequent election—they are elected to the Board by the chapter membership): _____
_____ (list officers by title or enter 'none').

COMMITTEES

14. This chapter will have the following Standing and additional committees, the chairpersons to be appointed by the President:

_____ (list committees and their functions.)

CHECKS AND MONEY

15. Two unrelated persons who are officers of the chapter must sign all chapter checks. The titles of officers authorized to sign checks for this chapter are _____
_____ (list titles of officers authorized to sign checks).

16. Expenses included in the chapter budget in the amount of _____ (designate a dollar range) may be approved by the board of directors. Expenses not included in the chapter budget or in the amount of _____ (designate a dollar amount) or more require the approval of the chapter membership. [Note: Whenever possible, chapters are strongly encouraged to have tour and other recreational activity fees paid directly to the tour company or other provider.]
17. The board of directors will prepare and submit an annual budget to the membership at the _____ (state either a month or annual) chapter meeting each year.
18. This chapter will reimburse members for travel to official AARP functions, or when representing the chapter at official community functions, only when the travel has been approved in advance by the board of directors.

BOARD OF DIRECTORS

19. The board of directors will consist of _____ (insert number; must be at least four but no more than 12) members. The Chapter President will, as a function of that office, serve as the chairperson of the board. _____ (insert number) Board members will be elected each year. Board members may serve _____ (insert one, two, or three) year terms but no more than two consecutive terms or hold office for a total of more than six consecutive years.

NOMINATING COMMITTEE

20. The Nominating Committee will consist of _____ members (insert an odd number from three to nine). Committee members will be _____ (insert elected by the membership or appointed by the incoming board) at the annual meeting. _____ members will be elected each year. Committee members may serve _____ (insert one, two, or three) year terms but no more than two consecutive terms.
21. The chairperson of the Nominating Committee will be _____ (insert elected by the membership or appointed by the incoming board or the committee members) at the annual chapter elections.

STANDING RULES

22. These Standing Rules will be reviewed annually by the board of directors at its first meeting following election. The Standing Rules may be revised by a simple majority vote of the chapter members voting with a quorum present, and updated at the annual chapter meeting.

This version of the Standing Rules was adopted by the chapter membership on _____ (insert date).

These Rules were prepared by: _____
(Chapter Member Name)

(Chapter Member Title)

Approved by Chapter member on this date: _____

Sample Meeting Materials

SAMPLE MEETING AGENDA

CHAPTER MEETING

The Very Best Chapter of AARP, Inc.

Your Town Community Center

April 8, 2017

1:00 p.m. Call to Order

(Begin the meeting on time. Options for opening the meeting include an interfaith invocation, the Pledge of Allegiance, salute to the flag, or a moment of silence.)

1:05 p.m. Welcome and Announcements

(Introduce new members, welcome visitors, AARP dignitaries.)

1:10 p.m. Minutes of the Previous Meeting

(Distribute the Minutes ahead of time. Accept the Minutes as read or provided or with amendments, if necessary.)

1:15 p.m. Chapter Reports

(Allow sufficient time for officer and committee chairpersons' reports. A copy of all reports should be filed with the chapter secretary.)

1:30 p.m. Old Business

(Discuss any unfinished business from previous meetings.)

1:45 p.m. New Business

(Introduce new business requiring chapter approval.)

2:00 p.m. Special Program

(Schedule the program earlier or later if more suitable for the program leader or the overall length of the program.)

2:25 p.m. Summary

(Review key decisions and action items from the meeting. Thank the speakers and attendees for their participation.)

2:30 p.m. Adjourn

(In closing, announce the date, time, and place of the next meeting.)

E

Appendix E

SAMPLE MEETING MINUTES

MEETING MINUTES

The Very Best Chapter of AARP, Inc.

Your Town Community Center

April 8, 2017

The *(board of directors or members)* of *(chapter name and number)* met in *(regular or special)* session on *(date)* at *(meeting location)*. *(Name of presiding officer)* presided. There *(was/was not)* a quorum present. Other officers and directors present were *(list names and titles)*.

(Name of presiding officer) called the meeting to order at *(time)*.

The Treasurer reported the following *(indicate a brief summary of the treasurer's report, usually beginning balance, receipts, expenditures, and ending balance)*.

The President *(or other presiding officer)* reported on the board of directors meeting *(provide a brief summary or name of topic reported)*.

The following committee reports were given. *(Record brief statements only. If a detailed report is submitted, note "see attached report" and attach the complete report to the minutes.)*

The President *(or other presiding officer)* took up the following unfinished business. *(Give the exact wording of each motion taken up and record what action was taken on it. Do not report the discussion of the motion.)*

The following new business was introduced. *(Give the exact wording of each motion taken up and record what action was taken on it. Do not report the discussion of the motion.)*

The meeting program consisted of *(name the guest speaker or presenter)*, who spoke on the topic of *(name of topic or activity)*.

The President *(or other presiding officer)* summarized the key points and actions of the meeting and announced that the next meeting was scheduled for *(date, time and location)*.

The meeting adjourned at *(time)*.

Parliamentary Procedures

Meetings:

General points to remember include:

For a subject to be taken up for consideration as chapter business, it must first be introduced. Any unfinished business—those items carried over from a prior meeting—is addressed before any new business is introduced. Having addressed the unfinished business, the presiding officer asks, “Is there any new business?” At this time, any member can make a motion to introduce an item of business.

For example, a member may say, “I move that we help establish AARP Driver Safety in our town.” Another meeting member must affirm or second the motion before the subject can be opened for discussion. Once opened, the mover cannot withdraw it without the consent of the meeting members. To facilitate the discussion, it is recommended that complicated motions be submitted in writing.

Once a motion has been introduced, it may be acted upon in a number of ways. A motion can, for instance, be amended. This means that someone moves to change, add, or omit words from the original motion. An amendment is open to discussion and must receive a majority vote of the members present to be valid. Another member may then move to amend the amendment or change the amended version of the original motion. The order in which each amendment would be taken up is 1) decide whether to support the amended amendment; 2) if the amended amendment is not accepted, decide whether to adopt the original amendment; and 3) if the original amendment is not accepted, decide whether to adopt the original motion. A motion to amend the amendment cannot itself be further amended.

Sometimes the discussion of a motion will be delayed because it is too complex or more research is required to establish the facts or more time is needed for discussion than is left on the agenda. In such instances, any member may move that the motion be referred to committee with instructions to further study or redraft the motion, as appropriate. If so instructed by a majority of the members present, the designated committee must report back or otherwise act as agreed upon. Decision on a motion can be postponed or tabled

F

Appendix F

until there is more time or information to act on it. A majority vote of the members present is required to table the motion (or to take the motion from the table at some future date) for further consideration. Once tabled, a motion can no longer be discussed on the floor until it is taken from the table.

Discussion that has become too lengthy, repetitious, or expanded beyond the scope of the motion can be brought to a close by a request to move the previous question. This provides the presiding officer with the opportunity to close debate and ask for a vote on the motion to the previous question. If approved by two-thirds of the members present, the motion under discussion is immediately put to a vote.

A member who feels there has been a breach of procedure may state such by calling out or requesting a “point of order.” The presiding officer then asks the member to “state your point of order.” After hearing from the member, the presiding officer determines whether or not the “point is well-taken” (i.e., a legitimate breach of procedure has or has not occurred) and takes such action as may be necessary.

Members can vote in several ways. On routine matters, the simplest way is for the presiding officer to ask whether there is any objection to the motion being made among the voting members present. If there is no objection, the presiding officer declares the motion has passed. When a majority vote is called for, the presiding officer may ask for a voice vote (“aye” and “no”). If the voice vote is close, or in cases where a two-thirds majority is required, a show of hands will do. Balloting should be reserved for elections, special or irresolvable issues, or where required by the chapter’s Bylaws or Standing Rules.

Officer Installation

The following is a suggested Installation Ceremony for AARP chapters. It includes a charge to all chapter members as well as the official “swearing in” of the officers themselves. Please adapt this installation as you see fit.

“I am honored and pleased to meet with you today. This is a great day for Chapter _____. It is a new beginning for this chapter and for each and every member.

This is especially true for these leaders whom you have selected to serve you as officers, directors, and committee chairpersons for the coming year.

As we install them into office, let us use this occasion to assess what we have accomplished for ourselves and for others, and what we have yet to accomplish. Let not only these chosen leaders but each and every member renew his or her resolve and dedication to carry out and further the goals and purposes of this chapter and of AARP.

Each of you who assume office has a significant responsibility, and we are deeply impressed by your dedication and loyalty. We are proud of each of you.

We realize that you will be called upon to make many decisions. With your abilities, and with the support of your fellow chapter members, you can proceed with confidence and pride.

You will also be called upon to give your time, your talents, and a part of yourselves to this new position. But remember the AARP motto: “To serve, not to be served.” The greatest gift to one’s self is service to others. May you find the patience, wisdom, and the charity to do so. And may you find strength in the knowledge that those you serve support you and wish you well.

On this important occasion in the history of this chapter, I should like to say a few words of thanks for a job well done to your outgoing officers.

Please stand and state your name and position.

You have spent the past year or more in unselfish dedication to this chapter and to AARP. You have volunteered many hours conducting meetings, filing reports, keeping records, and performing the many tasks, large and small, that have resulted in the growth and quality the chapter enjoys today. From your chapter members, the state office and the National Association, many, many thanks, indeed.

G

Appendix G

(Lead Applause)

At this time it is my pleasure to install the officers and directors you have chosen to you. They have generously accepted the responsibility you have placed upon them.

But you too, have a responsibility. Each of you must cooperate with your officers. When called upon to assist, respond willingly. In so doing, you will be helping your leadership in its demanding tasks.

Will all new officers, directors, and committee chairpersons, and members of the nominating committee please come forward? (note: another option is to call each officer name and position individually.)

Please state your name and position.

Raise your right hand. I will read your oath and at the end I will ask that if you accept the conditions of the oath that you respond by saying, 'I will.'

(Official Installation)

I sincerely declare that I am willing to accept the place of service for which I have been selected.

I further declare that I will, to the best of my ability, perform the duties pertaining thereto.

I will comply with the bylaws, rules, and regulations of AARP and this chapter.

I will at all times, and on all occasions, earnestly endeavor to promote with dignity all worthy causes being promoted by this chapter and AARP, and I will never use my office for personal promotion or material gain. I shall give myself in unselfish service to the chapter and its members as the need becomes evident, and as my ability and opportunity permit.

If you accept this post—please respond by saying, 'I will.'

In my capacity as (use installer's title here) an appointed representative of AARP, it is my privilege to declare that each of you is here and now duly installed in your office.

For your willingness to accept your important assignments and to be of service, I am sure that all here join me in saying congratulations.

Thank you." *(Lead applause.)*

Building Your Chapter Membership Strategies That Work

Chapter Advisory Team

Your chapter's membership isn't growing and may even be declining. What to do? The suggestions here are designed to help chapters take charge of the problem and get their rosters moving in the right direction. Choose one or several of the proven ideas here for positive results.

Start with Your Current Members

Invite someone you know to join. In addition to our chapter membership, we all have other groups in our circle of friends and acquaintances. Whether it is your church, gym, book club, civic club, walking group or your weekly coffee group, there are people you know who don't belong to your chapter. Pick one or two people you think might enjoy your chapter and ask them to attend a meeting with you.

Particularly think of inviting some of your younger senior friends. When they attend, make sure you introduce them to others in the group and let them know about all of your chapter activities.

Conduct a member-get-a-member campaign. Enlist every chapter member in bringing in a new member, drawing from their own circle of friends. Consider offering a prize—maybe a year's free membership—to the member who brings in the most new members. One chapter puts the name of every member who brings in a new member into a drawing to win a free gift card to a local restaurant. If every current member gets just one new member, you can double your membership in a year!

Remind chapter members that membership is everyone's business. Encourage members to invite friends to a meeting.

Practice a one-minute "elevator" speech. If you have only one minute to explain to someone why they might want to join your chapter, what would you say? Think about what being a member has meant to you, the opportunities it has provided, and how the chapter benefits members and your community.



Appendix H

Make Meetings Count

Hold your meetings at a good location. Where you meet says a lot about your group. Try to find a location with a nice atmosphere—a place that members and prospective members can look forward to coming to month after month.

Hold some meetings at night. If you want to attract younger members to your chapter, you need to schedule some meetings at a time when those still in the workforce are more likely to be able to attend. You might even consider a wine and cheese social in late afternoon as a way to introduce your chapter to younger AARP members. Offer transportation to evening events to older members who may not want to drive at night.

Keep membership at the forefront all of the time. At every meeting ask your membership chair to speak, welcoming new members and challenging all current members to bring a prospect with them to the next meeting.

Have a social time at every meeting. This gives members a chance to talk one-on-one with new or prospective members attending the meeting to make them feel welcome. A host committee can assure that new attendees are welcomed warmly and made to feel important.

Follow up with visitors. Membership committee members can send out a welcome letter and make a call to answer questions and encourage membership.

Reach Out in Your Community

Spread the word. A simple flyer on an 8½ x 11 inch sheet of paper can be developed and placed on bulletin boards throughout the community, in doctor's offices, libraries and community centers. Make sure the flyer includes a contact name and number.

Advertise your chapter. You don't have to place a paid advertisement. Many community papers have community calendars and are happy to list your meeting times and place. Make sure you let local media know when your chapter completes a project of benefit to your community.

Get a chapter card. For very little cost, you can get a large quantity of cards printed up with the location and time for your meetings and chapter contacts. Distribute the cards among members and ask them to give them to others at every opportunity.

Be visible in your community. Take advantage of local events to publicize the chapter. Sponsors often offer non-profit organizations a free table or make it available at a nominal cost. These events give you a chance to meet a broad spectrum of individuals who might be interested in your chapter.

Welcome newcomers to your community. New home developments, community welcome centers, chambers of commerce and town halls are great locations to distribute posters or other types of handouts about your chapter. Newcomers are often looking for ways to get to know others and get involved in the community's life. Make sure they know about your chapter.

Service projects shine the spotlight on your chapter. Plan at least one activity a year that is visible in the community. Examples are things such as conducting a food drive at a grocery store or sponsoring a clean-up day at a park. Have members wear t-shirts that identify your organization.

Publicize the good things you do. Name a person as public information chair to send regular information about your chapter to media throughout your area. Ask them to work to become a reliable source of information about issues affecting seniors. Information of interest might include service projects, financial contributions, other good things you do, officer elections and chapter recognition. If you have photos of things you have done, you can often get even more visible coverage.

Invite the media to cover chapter events. They may be willing to cover speakers on topics of interest in the community or to send a photographer to a community event sponsored by the chapter. Media coverage of outstanding chapter activities will catch the attention of prospective members.

Fundraisers are great opportunities to find new members. Extend personal invitations to prospective members to events that you sponsor. When you thank the group for coming, make sure to invite attendees to join your chapter and have applications ready to distribute.

Don't forget former members. They are some of your best prospects. Establish a calling group to make personal contacts with the former members. Find out why they have not renewed their membership and encourage them to come back.

Remember that the best thing you can do is simply to invite someone to join. An invitation makes prospective members feel welcome and most likely to say “yes I would like to join.”

AARP Chapter Officer Update Form

Instructions

Please provide street address, telephone number and email address of the Chapter Officers. Please send this form to AARP Office of Volunteer Engagement, Attn: Chapters, 601 E Street NW, Washington, DC 20049. Email: volunteer@aarp.org. Please print clearly.

Chapter Name: _____

Chapter Number: _____

Officer Information (Year: _____)

Chapter President Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Chapter Vice President Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Chapter Secretary Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Chapter Treasurer Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Continued on next page



Chapter Officer Update continued

Chapter Name: _____

Chapter Number: _____

Officer Information (Year: _____)

Chapter Legislative Chair Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Chapter Healthcare Chair Name: _____

Street Address: _____

Contact Phone: _____ Email Address: _____

City/State/ZIP Code: _____

Accounting Guide for Chapter Treasurers

Introduction

Each incorporated AARP chapter is granted federal income tax exemption under Section 501(c)(4) of the Internal Revenue Service Code by a group exemption determination issued by the Internal Revenue Service (IRS) to the national Association, exempting from federal income tax those chapters that comply with the guidelines established by AARP. AARP has been granted an exemption from federal income tax under the same section of the IRS Code. It is imperative that this status and these determinations are not jeopardized.

Accounting procedures and financial records need not be complex to ensure continuance of the chapter exemption, but the IRS reporting requirements must be satisfied. Therefore, it is essential that:

- The accounting year begins on January 1 and ends on December 31.
- All chapter accounts are accurate and complete.
- All accounts are maintained in a uniform manner to meet annual audit requirements and provide the information needed for reports.

As the result of arrangements between AARP and the IRS, chapters are relieved of the burden of annually filing exempt organization returns with the IRS. Each year, on behalf of participating chapters, AARP prepares and files a group exempt organization return with the IRS and handles all related correspondence. To participate in the group filings, a Chapter Treasurer's Report, **FULLY COMPLETED AND BALANCED**, must be prepared at the end of each accounting year and submitted to the AARP Office of Volunteer Engagement within the time limits prescribed.

The Office of Volunteer Engagement will also handle any IRS correspondence the chapter may receive concerning the annual return, but the IRS correspondence must be immediately forwarded to:

AARP Office of Volunteer Engagement—Chapters
601 E Street, NW
Washington, DC 20049

Occasionally, some chapters may be individually notified of additional procedures not discussed in this handbook that must be implemented to comply with IRS requirements and/or participate in the annual group returns. However, such notices can be prevented in many instances if the forms and procedures described in this handbook are consistently used to maintain complete, accurate financial records and to prepare the annual AARP Chapter Treasurer's Report.

The Treasurer holds an office of trust with many responsibilities to protect the interests of the chapter and comply with the Articles of Incorporation, Bylaws, government regulations, and AARP policies that must be observed. The duties are exacting, but they need not be tedious. This section suggests simple procedures to minimize the time entailed in maintaining the financial records needed to prepare the required reports.

Thank you for your attention to, and use of, this guide. If additional information is desired, please contact your state office.

The following provides information on completing the chapter treasurer's report form.

Balance on Hand at Beginning of Year

- A. Cash on hand includes money that had not been deposited in any of the chapter's accounts as of January 1 of the reporting period.
- B. Enter the total of all bank balances taken from your checkbook (not bank statement) as of January 1 of the reporting period.
- C. Enter the total balances of all savings and investment accounts (including, for example, such things as money market accounts, certificates of deposits, etc.) as of January 1 of the reporting period.
- D. Add lines A + B + C above and enter total.

Classification of Receipts

Receipts must include all money received by the chapter and the fair market value of all goods and services provided to the chapter in lieu of money. Only the classifications listed in Section III of the AARP Chapter Treasurer's Report may be used to report receipts. They are:

- E. Chapter Dues Received
- F. Gifts of Donations Received
- G. Payments Received for Tours or Bus Trips

- H. Amounts Received for Social Events
- I. Amounts Received from Items Sold
- J. Interest/Dividend Income Received
- K. Program Income Received
- L. Advertising Income Received
- M. Other (Specify)

Following are some instructions on what to report—and what not to report—in each category.

E. Chapter Dues Received

Report only money received for chapter dues. Do not include payments for national membership dues.

F. Gifts or Donations Received

All receipts in the form of gifts, donations, endowments, trust funds or contributions to special funds (other than social events) are to be reported in this classification.

G. Payments Received for Tours or Bus Trips

All receipts for chapter-sponsored trips, tours, or excursions (either paid into the chapter treasury or into a travel account maintained by the chapter) are to be reported in this classification.

Include all funds collected for trip insurance and refunds received for such activities.

AARP Chapter Bylaws require that the treasurer has responsibility for the accounting and reporting of all chapter funds. Separate bank accounts for travel, tours or other special activities that are not under the direct control of the treasurer are not encouraged. If such separate accounts are maintained, the responsible person should be an assistant treasurer, who must report all receipts and expenditures to the chapter treasurer.

Do not include money for chapter-sponsored trips or tours if the tour or trip is arranged for the chapter by a travel agency (or other provider or travel services) and the individuals who participate pay their money directly to the travel service.

[Note: Check with your secretary of state or attorney general to determine if these monies may be handled by the chapter treasurer or go directly to the bus company/travel agency.]

H. Amounts Received for Social Events

All money received for social events is to be reported in this classification. Such events include:

- Bake sales
- Coffee funds
- Craft sales
- Dances & parties
- Dinners & luncheons
- Free will donations
- Musical programs
- White elephant sales
- Thrift tables
- Bingo receipts
- Door prizes
- Refreshment reimbursement
- Sunshine collections and similar activities

I. Amounts Received from Items Sold

Receipts from the sale of all items purchased by or given to the chapter for resale will be reported in this classification. This includes revenue from AARP jewelry, Christmas cards; cold drinks, vending machines, stationery, raffle tickets, cans, bottles, and papers for recycling; 50/50; thrift tables, etc.

Jan 15, 20	
No. <u>132</u>	
RECEIVED OF	RICHARD ROE
<u>Six and no/100</u>	DOLLARS
For	AARP JEWELRY
Previous Balance	
Amount Paid	\$6.00 ANYTOWN CHAPTER #6000
Balance Due	By <i>John Treasurer</i>

J. Interests/Dividends Received

All interest and dividends accruing during the reporting year that are paid from or credited to any chapter checking, savings or other type of interest-producing accounts must be reported in this classification.

K. Program Income Received

Report in this classification all receipts from any sources relating to AARP-sponsored programs; for example, AARP Driver Safety.

L. Advertising Income Received

This classification should be used only to report money that is received for advertisements published in chapter newsletters, bulletins, or other publications. Net advertising income may be taxable. Therefore, if ads are sold, the payments received must be reported in this classification. Income from advertising should be limited so that it will not exceed the actual cost of printing and mailing.

M. Other (Specify)

There should be few reasons to use this classification. It is to be used only when money or property is received that cannot be included in any of the preceding classifications. When any receipts are reported as "other," the source must be specified.

[Note: Funds transferred to the chapter's checking account from its savings account, or vice versa, should not be reported as income. Chapters collecting national membership dues are encouraged to have checks or money orders made payable directly to AARP by the member. In the event that any national membership dues are handled through chapter bank accounts,

the money collected is to be entered on this line. Also include the total amount of all grant money received from other organizations/agencies.]

N. Add lines E-M in Section III; enter total here. \$ _____

Classification of Expenditures

All chapter expenditures must be reported. Include all money paid out of chapter funds for any purpose. Only the classification listed in Section IV of the AARP Chapter Treasurer's Report may be used to report expenditures. They are:

O. Amounts paid for meeting expenses

Expenses reported in this classification include:

- Door prizes
- Speakers' fees
- Payment to set up room
- Janitorial services
- Refreshments
- Rent and equipment for meeting room
- Rental of halls and other related items

P. Amounts paid for salaries

Q. Gifts or donations made

All money spent for gifts, donations, and related items must be reported in this classification. Expenditures that would be included are chapter gifts or donations to:

- AARP Foundation
- Special funds or projects
- Scholarships
- Charitable or religious organizations
- Memorial funds

R. Amounts paid for tours or bus trips

Report all money with chapter funds for chapter-sponsored trips, tours, or excursions in this classification (including funds received from members and set aside for this purpose). Also include payments for tour insurance, tips to guides, refunds for tour deposits due to cancellations, and related expenses.

[Note: Remember to check with your secretary of state or attorney general to determine how nonprofits in your state are required to handle monies received for tours and bus trips.]

S. Amounts paid for social events

Report all money paid to conduct social events such as lunches, dinners, bonanzas, parties, refreshments at meetings, bake sales, craft sales, white elephant sales, bingo receipts, coffee funds, door prize collections, kitty, musical programs, dances, Freewill Dinners, or similar events.

T. Amounts paid to buy items for resale

In this classification, report all money spent to purchase items for resale such as AARP jewelry, greeting cards, stationery, 50/50, raffles, thrift tables, etc.

U. Amounts paid for administrative costs

All money spent for administrative expenses should be reported in this classification. Include:

- Printing
- Annual report fees
- Bank checks and service charges
- Office supplies
- State fees
- Postage stamps
- Flags and banners
- Liability insurance fees
- Dues refunds
- Telephone
- Office equipment
- Petty cash
- Travel costs of chapter officials to attend Leadership Workshops
- Payments to individuals who set up the meeting room (janitors), or who deliver equipment should be included on Line U

V. Program costs paid

Program costs for materials or for the transportation of materials required for any of the AARP-sponsored programs, such as AARP

Driver Safety, or costs to purchase programs from AARP should be reported in this classification.

W. Amounts paid to print and mail newsletters

In this classification, report all costs to print and mail chapter newsletters, bulletins, or other publications, including expenses for paper, reproduction, postage, postal permits, etc.

X. Other (specify)

This classification should be used only if money was spent that cannot be included in any of the preceding classifications. An item that might be included would be a check, drawn on the chapter's account, payable to AARP for monies received from several members to pay individual membership dues.

[Note: Funds transferred to the chapter's savings account from its checking account, or vice versa, should not be reported as an expense. In the event that any national membership dues are handled through chapter accounts, the money sent to the national Association is to be entered on Line X. Also include the total amount of all grant money received from other organizations/agencies.]

Receipt Form

When money is received, a receipt should be given. Receipts are not available from AARP, but can be obtained from stationery and variety stores at nominal cost. Use carbonized receipt books that contain a white original and a colored copy. Give the white original to the person from whom the money is received. Keep the colored carbon copy for your records. When preparing receipts:

- Number them consecutively and date each one.
- Write in the name of the person or organization for which the receipt is prepared.
- Write in, or stamp, the name and number of the chapter.
- Sign each receipt.
- If an error is made in writing a receipt, mark it "VOID" and keep the copy for your records.

An example of a completed receipt is shown below.

Accounting Journals

The forms used to maintain records of money received and spent are called JOURNALS. The two designed specifically for AARP chapters are:

- Receipt Journals (12 monthly sheets + 1 summary)
Journal Packet = Stock #C893
- Expenditure Journal (12 monthly sheets +1 summary)
Journal Packet = Stock #C0895

Journals that are properly maintained will ensure full and accurate reporting of the chapter receipts and expenditures. Additional copies of the journals may be obtained at no cost. Indicate the quantity, stock number, and type of journals desired and email a request to fulfillment@aarp.org.

Each Journal is described and illustrated below.

Receipts Journal

Monthly

Generally, you should begin each month with a new Monthly Receipts sheet. Use as many monthly forms as necessary to record all money received each month. Recording receipts on the form is called “posting.” Column headings correspond to the classification in Section III of the AARP Annual Treasurer’s Report. Use only the columns needed but do not revise the column headings or make substitutions.

Prepare each form by entering:

Summary page

1. Chapter name and number
2. Month and year

Monthly pages

1. Chapter name and number
2. Year


Each posting normally requires three entries:

1. The date each receipt is issued.
2. The receipt number(s).
3. The amount of money received, posted in the correct column.
Figure 1 illustrates the manner in which receipts for one month are

posted in the Monthly Receipts. The first entry reflects the issuance on March 5 of ten \$1.00 receipts (#21 through #30) for chapter dues. The total amount, \$10.00, is entered in the “Chapter Dues” column.

Figure I

MONTHLY RECEIPTS
(Record All Money Received)



Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20__

DATE	ITEM	AMOUNT DEPOSIT	(III E) CHAPTER DUES	(III F) GIFTS	(III G) TOURS & TRIPS	(III H) ISOCIAL EVENTS	(III I) ITEMS SOLD	(III J) INTEREST/DIVIDEND	(III K) PROGRAM INCOME	(III L) ADVERTISING INCOME	(III M) OTHER (SPECIFY)
3/5	RECEIPTS 21 THRU 30		10.00								
	RECEIPTS 31 THRU 70				200.00						
	RECEIPT 71			5.00							
3/6	BANK DEPOSIT	215.00									
3/19	RECEIPTS 72 THRU 81					60.00					
	RECEIPTS 82 THRU 106		15.00								
	RECEIPTS 107 THRU 131								25.00		
	RECEIPT 132						6.00				
	RECEIPTS 133 THRU 142						5.00				
3/29	SAVINGS PASSBOOK	4.97							4.97		
	CHECK #3522 - BUS CO				8.00						
3/29	BANK DEPOSIT	118.00									
	TOTALS	338.97	25.00	5.00	208.00	60.00	11.00		4.97	25.00	

When two or more postings are made on the same day, it is not necessary to show the \$4.97 savings account interest payment received. Most chapters do not have savings accounts. If a savings account is maintained, or another type of interest and/or dividend-producing account is used, the amount of interest/dividends paid or credited to the account must be posed in the “Amount Deposit” and “III-J, Interest/Dividend Income” columns.

Receipts are not issued for checks received, but the amounts must be posted in the Receipts Journal. The second entry on March 29, check #3522, represents a refund from a bus company for an \$8.00 deposit that was returned when a reservation was canceled. The last posting represents another bank deposit during the month. If all money received is deposited in the bank, the total deposits for the month (\$338.97) must equal the totals of all columns in which postings are made.

When all receipts for the month are posted, draw a double line beneath the last entry, write “TOTALS” in the “Item” column below the double line, total each column, and transfer the totals to the Summary Receipts sheet.

Postings for each chapter will be different, but all receipts and their sources must be accounted for on the monthly sheets. A completed Monthly Receipts sheet is shown below.

Chapters that have a small number of monthly postings may combine the entries of several months on one sheet, as illustrated in Figure 2.

Figure 2

MONTHLY RECEIPTS
(Record All Money Received)

AARP
Real Possibilities

Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20__


DATE	ITEM	AMOUNT DEPOSIT	(III E) CHAPTER DUES	(III F) GIFTS	(III G) TOURS & TRIPS	(III H) SOCIAL EVENTS	(III I) ITEMS SOLD	(III J) INTEREST/DIVIDEND	(III K) PROGRAM INCOME	(III L) ADVERTISING INCOME	(III M) OTHER (SPECIFY)
4/11	RECEIPTS 1 THRU 26		25.00								
	RECEIPTS 26										
	BANK DEPOSIT	30.00		5.00							
	TOTALS APRIL	30.00	25.00	5.00							
5/11	RECEIPT 27 THRU 41		15.00								
	BANK DEPOSIT	15.00									
	TOTALS MAY	15.00	15.00								
6/13	RECEIPTS 42 THRU 44						6.00				
	RECEIPTS 45 THRU 54		10.00								
	RECEIPT 55			10.00							
	BANK DEPOSIT	26.00									
	TOTALS JUNE	26.00	10.00	10.00			6.00				

Summary

The Summary Receipts sheet consolidates all RECEIPTS for the year. The totals for each classification, obtained when the Monthly Receipts are completed, are posted to the Summary sheet. From here, they can be transferred to the Annual Treasurer’s Report.

Figure 3 illustrates a Summary Receipts sheet with postings for one accounting year. Do not change the reporting classifications since they are the same as those to be reported to AARP on the Treasurer’s Report. Separate columns are provided to post each month’s total receipts and totals for the year.

Figure 3



SUMMARY RECEIPTS JOURNAL
(All Money Received)

Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20__

ITEM (See Annual Treasurer's Report)	ENTER TOTALS FROM MONTHLY GROSS RECEIPTS JOURNAL												Total for Year
	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
III-E Chapter Dues	120.00	72.00	25.00	20.00		15.00		5.00			10.00	75.00	342.00
III-F Gifts or Donations			5.00	5.00		10.00		5.00				5.00	30.00
III-G Trips or Bus Trips	175.00	55.00	208.00		370.00		425.00	50.00	120.00	75.00			1478.00
III-H Social Events	60.00		60.00	80.00			120.00		60.00		50.00		430.00
III-I Sale of Items			11.00			6.00			12.00		2.50		31.50
III-J Interest/Dividend Income			4.97			5.24		5.53				5.84	21.58
III-K Program Income	30.00		25.00		40.00		20.00		25.00		35.00		175.00
III-L Advertising Income													
III-M Other (Specify)													
TOTAL GROSS RECEIPTS	385.00	127.00	338.97	105.00	410.00	36.24	565.00	60.00	222.53	75.00	97.50	85.84	2508.08

[Note: For Figure 3, the March figures are the totals from the Monthly Receipts shown in Figure 1. All others were selected at random.]

Care must be taken to ensure that all receipts are accurately and identically posted in the same classification in the Monthly Receipts, the Summary Receipts, and Section III of the annual Treasurer's Report. Check your figures. Add the "Total Gross Receipts" across the bottom line. Then add the "Total for Year" column. Both totals should be the same. In the Figure 3 illustration this total is \$2508.08.

If you do not obtain the same total when each set of figures is added, an error has been made in posting or addition. In such a case, it will be necessary to review your work to find and correct the error.

Expenditures Journal Monthly

Journals for recording expenses (money spent) and the posting procedures are similar to those for recording receipts. Generally, you should begin each month with a new Monthly Expenditures sheet. As with the receipts, use as many forms as necessary to record all money spent each month. Column headings correspond to all the classifications in Section IV of the AARP Chapter Treasurer's Annual Report. Use all the columns needed, but do not revise the column headings.

Prepare each form by entering:

Summary Page

1. Chapter name and number
2. Year

Monthly Pages

1. Chapter name and number
2. Month and year.

Five entries are usually made on each line:


1. Date of expenditure
2. Identification of payee
3. Check number
4. Amount of check
5. A second entry of the amount spent (in the correct classification column).

Posting examples are shown in Figure 4. The first reflects issuance of check #127 on March 1 for \$10.00. The “payee” is Postmaster. (Such a check could be written to purchase stamps for regular chapter business.) The date of the check, the payee, the check number and the amount (\$10.00) are entered in the respective columns from left to right. As this would be an Administrative Cost, the amount is again posted in column “IV-U, Administrative Cost.”

The second entry on March 5 illustrates a posting of check #128 for \$15.00 as a gift to a hospital fund. The amount is also posted in column “IV-Q, Gifts.” (Chapters frequently make monetary gifts to worthy organizations.)

Figure 4

MONTHLY EXPENDITURES
(Record all money Spent)



Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20__

DATE	ITEM	CHECK NO	IV-O MEETING EXPENSE	IV-P SALARIES	IV-Q GIFTS OR DONATIONS	IV-R TOURS OR TRIPS	IV-S SOCIAL EVENTS	IV-T RESALE ITEMS	IV-U ADMIN. COST	IV-V PROGRAM COST	IV-W NEWSLETTER COST	IV-X OTHER (SPECIFY)
3/1	POSTMASTER	127	10.00						10.00			
3/5	HOSPITAL FUND	128	16.00		15.00							
3/7	SECT OF STATE	129	5.00						5.00			
3/11	BUS COMPANY	130	160.00			160.00						
3/14	OK FLOWER SHOP	131	10.00						10.00			
3/19	AARP	133	20.00					20.00				
	R. SMITH	134	10.00	10.00								
	CATERERS INC.	135	50.00				50.00					
3/28	U.B. CHURCH	136	10.00	10.00								
	J. DOE	137	5.00	5.00								
	PETTY CASH	138	5.00						5.00			
	AARP	139	25.00							25.00		
	REFUND- MR. & MRS ROE		10.00			10.00						
	TOTALS		335.00	25.00	15.00	170.00	50.00	20.00	30.00	25.00		

Other types of expenditures, illustrated by the postings on March 7, March 11, and March 14 are:

1. Check for \$5.00 to the secretary of state for a reporting fee “IV-U, Admin. Cost”
2. Check for \$160.00 to a bus company for a chapter tour “IV-R, Tours”
3. Check for \$10.00 to purchase flowers “IV-U, Admin. Cost”

The check numbers for the postings on March 19 and March 28, with a description of the purpose for which each might have been issued, are:

Check # 133—A check for \$20.00 to AARP for the purchase of jewelry to be resold should be posted under “IV-T, Resale Items.”

Check # 134—An individual, R. Smith, is shown as “payee.” This type of expenditure might be made to provide a guest speaker with a small honorarium. This would be posted under “IV-O, Meeting Expense.”

Check # 135—The “payee” is a caterer. Chapters may have occasion to order food for a luncheon. In the illustration, the \$50.00 spent is posted as a cost in conjunction with a social event under “IV-S, Social Events.”

Check # 136—This type of entry would be used to post a rental payment for chapter meeting facilities. The amount (\$10.00) is posted under “IV-O, Meeting Expense.”

Check #137—This payment of \$5.00, posted under “IV-O, Meeting Expense,” illustrates payment to any individual for setting up tables and chairs for a meeting.

Check #138—This entry shows the procedure to obtain “Petty Cash.” The amount is posted to “IV-U, Administrative Cost.” A small amount of cash (usually \$5 to \$10) may be kept on hand to reimburse committee chairs or other members authorized to make small purchases for the chapter. *[Note: If a check is written for “Petty Cash” and the amount is posted in the journal, the money is accounted for. Do not report it as “cash on hand” in Section II or V of the Treasurer’s Report.]*

Check #139 —This illustrates the posting of a \$25.00 check to AARP for material relating to an AARP Driver Safety course. All expenses for the programs sponsored by AARP are posted to Column “IV-V, Program Cost.”

The last entry illustrates the procedure to post a refund. It represents a \$10.00 reimbursement to a couple that canceled reservations for a chapter trip. The amount is posted under “IV-R, Tours/ Trips.” (Refunds for other reasons would be posted to the appropriate columns.)

When all expenditures for the month have been posted, a double line should be drawn beneath the last entry. Write TOTALS in the “Item” column below the double line, total each column, and transfer the totals to the Summary Expenditures sheet.

The entries will be different for each chapter, but all money spent must be posted and accounted for on the monthly sheets.

Chapters with a small number of monthly expenses can combine the entries for several months on one Monthly Expenditure sheet, as was illustrated in Figure 2 for Receipts.

Summary

The Summary sheet consolidates all Expenditures for the year. The totals for each classification on the Monthly Expenditures are posted to the Summary form, which then can be readily transferred to the annual Treasurer’s Report.

A sample Summary Expenditures sheet, with posting for one accounting year, is shown in Figure 5. The column on the left lists reporting classifications. Do not change the reporting classifications, since

they are the same as those to be reported to AARP on the Treasurer's Report. Separate columns are provided to post each monthly total expenditures and totals for the year. [NOTE: The figures for March are the totals from the Monthly Expenditures in Figure 4.]

Figure 5

**SUMMARY
EXPENDITURES JOURNAL**
(Record all money Spent)



Chapter Name and Number ANYTOWN CHAPTER #6000

Month of March, 20__

ITEM (See Annual Treasurer's Report)	ENTER TOTALS FROM MONTHLY EXPENDITURES JOURNAL												Total for Year
	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
IV-O Meeting Expense	25.00	20.00	25.00	20.00	25.00	20.00	30.00	20.00	25.00	20.00	25.00	20.00	275.00
IV-P Salaries													
IV-Q Gifts or Donations		15.00				25.00			20.00			20.00	80.00
IV-R Tours or Trips	150.00	45.00	170.00		300.00		387.00	50.00	100.00				1264.00
IV-S Social Events	50.00		50.00		65.00		100.00		50.00	62.00	40.00		355.00
IV-T Resale Items			20.00					27.00				10.00	57.00
IV-U Administrative Cost	25.00	10.00	30.00	12.50	8.45	7.50	8.00	14.70	6.50	5.00	6.87	5.98	140.50
IV-V Program Costs	30.00		25.00		40.00		20.00		25.00		35.00		175.00
IV-W Newsletter Cost													
IV-X Other (Specify)													
TOTAL GROSS RECEIPTS	280.00	90.00	320.00	32.50	438.45	52.50	545.00	111.70	226.50	87.00	106.87	55.98	2346.50

Care must be taken to ensure that all expenditures are posted accurately and identically in the same classification in the Monthly Expenditures, the Summary Expenditures, and the Section IV of the annual Treasurer's Report.

To check your figures, add the "Total Expenditures" across the bottom line. Then add the "Total for Year" column. Both totals should be the same. In Figure 5, the total is \$2346.50.


If you do not obtain the same total when each set of figures is added, an error has been made in posting or addition. In such a case, it will be necessary to review your work to determine and correct the error.

AARP Chapter Treasurer's Report

Figure 8 represents a completed Treasurer's Report. Reports are mailed to each chapter in November. They must be completed and returned to the AARP Office of Volunteer Engagement within the time specified in the Chapter Treasurer's Report instructions in order for the incorporated chapter to be included in the IRS group exempt organization return. All reports must be submitted only on the form provided.

Figure 6

SUMMARY RECEIPTS JOURNAL
(All Money Received)




Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20

ITEM (See Annual Treasurer's Report)	ENTER TOTALS FROM MONTHLY GROSS RECEIPTS JOURNAL												Total for Year
	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
III-E Chapter Dues	120.00	72.00	25.00	20.00		15.00		5.00			10.00	75.00	342.00
III-F Gifts or Donations			5.00	5.00		10.00		5.00				5.00	30.00
III-G Trips or Bus Trips	175.00	55.00	208.00		370.00		425.00	50.00	120.00	75.00			1478.00
III-H Social Events	60.00		60.00	80.00			120.00		60.00		50.00		430.00
III-I Sale of Items			11.00			6.00			12.00		2.50		31.50
III-J Interest/Dividend Income			4.97			5.24			5.53			5.84	21.58
III-K Program Income	30.00		25.00		40.00		20.00		25.00		35.00		175.00
III-L Advertising Income													
III-M Other (Specify)													
TOTAL GROSS RECEIPTS	385.00	127.00	338.97	105.00	410.00	36.24	565.00	60.00	222.53	75.00	97.50	85.84	2508.08

Figure 7

SUMMARY EXPENDITURES JOURNAL
(Record all money Spent)



Chapter Name and Number ANYTOWN CHAPTER #6000 Month of March, 20

ITEM (See Annual Treasurer's Report)	ENTER TOTALS FROM MONTHLY EXPENDITURES JOURNAL												Total for Year
	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
IV-O Meeting Expense	25.00	20.00	25.00	20.00	25.00	20.00	30.00	20.00	25.00	20.00	25.00	20.00	275.00
IV-P Salaries													
IV-Q Gifts or Donations		15.00				25.00			20.00			20.00	80.00
IV-R Tours or Trips	150.00	45.00	170.00		300.00		387.00	50.00	100.00				1264.00
IV-S Social Events	50.00		50.00		65.00		100.00		50.00	62.00	40.00		355.00
IV-T Resale Items			20.00					27.00				10.00	57.00
IV-U Administrative Cost	25.00	10.00	30.00	12.50	8.45	7.50	8.00	14.70	6.50	5.00	6.87	5.98	140.50
IV-V Program Costs	30.00		25.00		40.00		20.00		25.00		35.00		175.00
IV-W Newsletter Cost													
IV-X Other (Specify)													
TOTAL GROSS RECEIPTS	280.00	90.00	320.00	32.50	438.45	52.50	545.00	111.70	226.50	87.00	106.87	55.98	2346.50

The entries required for each section of the report are:

Section I

On line A, the full name and number of the chapter.

Section II

On line A, any cash on hand that was not deposited or accounted for as petty cash on January 1 of the reporting year. On lines B and C, respectively, all January 1 checking and savings account balances, with the total amount on the double line.

Section III and IV

The totals, transferred from the Summary sheets to the corresponding lines on the Treasurer's Report, as illustrated by Figures 6, 7, and 8.

Section V

On line AA, any Cash on Hand as of December 31 of the reporting period. On line BB, the check book balance(s) on December 31. On line CC, the savings balance(s) on December 31.

Section VI

A list of chapter bank accounts by type, the name and address of each bank, and the account number(s).

Section VII

Answer as appropriate. If the answer to the first question is "Yes," the trip and tour fees paid directly by the participants to the provider of the services should not be included in the treasurer's records and accounts. Answer as appropriate. If the chapter does not own land, buildings, automobiles, etc., circle "No."

Section VIII

The Treasurer's printed name and signature, telephone number, and full address. Read the printed statement carefully. Reports that are not signed will be returned to the chapter.

Transferring Figures from Journals to Treasurer's Report

Summary

The benefits that accrue by use of uniform accounting and reporting methods become increasingly apparent with the growth of AARP chapters. It is recognized that operations vary widely and that factors unique to some chapters may not be included in the *AARP Chapter Handbook*. Requests for further clarification of the accounting and reporting procedures should be directed to your state office.

Please retain this guide and ensure that it is included with the records that the chapter maintains and passes on to the next elected treasurer.

Figure 8

AARP Chapter Treasurer's Report for Calendar Year 2017, Page 1 Deadline for sending this form to AARP/Headquarters is January 31, 2018			
Section I.	Chapter Name <u>ANYTOWN CHAPTER</u>		
	Chapter Number <u>#6000</u>		
Section II. Balance On Hand At Beginning Of Year			
A.	Cash on hand January 1, 2017	\$ <u>126.28</u>	1
B.	Checkbook balance(s) on January 1, 2017....	\$ _____	2
C.	Savings balance(s) on January 1, 2017.....	\$ <u>90.36</u>	3
		216.64	
Add lines A & B & C in Section II and enter total here:		D. \$ _____	4
<i>(Note: Balance on hand at beginning of year should equal ending balance from 2016 report)</i>			
Section III. All Money Received During 2017			
E.	Chapter dues received	\$ <u>342.00</u>	5
F.	Gifts or donations received	\$ <u>30.00</u>	6
G.	Payments received for tours or bus trips	\$ <u>1478.00</u>	7
H.	Amounts received for social events	\$ <u>430.00</u>	8
I.	Amounts received from items sold.....	\$ <u>31.50</u>	9
J.	Interest/Dividend Income received.....	\$ <u>21.58</u>	10
K.	Program Income received	\$ <u>175.00</u>	11
L.	Advertising income received	\$ _____	12
M.	Other (specify). (13) _____	\$ _____	14
		2508.00	
Add lines E through M in Section III and enter total here:		N. \$ _____	15
Section IV. All Money Spent During 2017			
O.	Amounts paid for meeting expenses.....	\$ <u>275.00</u>	1
P.	Amounts paid for salaries	\$ _____	2
Q.	Gifts or donations made	\$ <u>130.00</u>	3
R.	Amounts paid for tours or bus trips	\$ <u>1264.00</u>	4
S.	Amounts paid for social events	\$ <u>355.00</u>	5
T.	Amounts paid to buy items for resale.....	\$ <u>57.00</u>	6
U.	Amounts paid for administrative costs	\$ <u>140.50</u>	7
V.	Program costs paid	\$ <u>175.00</u>	8
W.	Amounts paid to print/mail newsletters	\$ _____	9
X.	Other (specify). (10) _____	\$ _____	11
		2396.50	
Add Lines O through X in Section IV and enter total here:		Y. \$ _____	12
Add Lines D plus Line N minus Line Y and enter total here:		Z. \$ <u>328.22</u>	
Section V. Balance On Hand At End Of Year			
AA.	Cash on hand, Dec. 31, 2017.....	\$ <u>216.28</u>	1
BB.	Checkbook balance(s) on Dec. 31, 2017	\$ <u>111.94</u>	2
CC.	Savings balance(s) on Dec. 31, 2017	\$ _____	3
		328.22	
Add Lines AA through CC and enter total here:		DD. \$ _____	4
NOTE: Line DD is the year end total and must equal Line Z.			
Please turn over and complete page 2			

AARP Chapter Treasurer's Report For Calendar Year 2017, Page 2

Section VI. Bank Accounts

Note: Each Chapter should maintain a bank account. Please list below all chapter bank accounts.

Type of Account (Checking/Savings/Other)	Name and Address of Bank	Account Number
A. Checking	Johnson Park_	1329-25
B. _____	_____	_____
C. _____	_____	_____

Section VII. Additional Information

- A. Were the costs for any chapter trips or tours paid directly by chapter members to a travel agency, church, individual, or other organization? (Circle one) Yes No
- B. Does the chapter own any real or property (buildings, land)? (Circle one) Yes No
- C. If you circled yes to question above, please describe: _____

Section VIII. Verification and Signature

I hereby declare that AARP is authorized to include this chapter in a group return to be filed by AARP on behalf of its chapters.

I further declare under penalties of perjury that this year 2017 AARP Chapter Treasurer's Report (including any accompanying schedules and statements) has been examined by me and to the best of my knowledge and belief is true and correct and was completed and made in good faith. To the best of my knowledge none of the above receipts inure to the benefit of any individual member of the chapter.

Treasurer's Name (Printed) _____
 Treasurer's Signature _____ Date _____
 Treasurer's Telephone (____) _____
 Treasurer's Mailing Address _____

Checklist

- ✓ Did the beginning balance for 2017 equal the ending balance for 2016?
- ✓ **Do Lines DD and Z equal?** If not, please review and make necessary corrections before sending the form in. **An unbalanced report will not be included in the AARP Group Return.**
- ✓ Could any of the items you included under "Other" (Lines M and X), be included on another line?
- ✓ If you had to include items under "Other" (Lines M and X), did you specify the reason the income was received or what the expenses were for?
- ✓ Did the treasurer sign the report?

Special Note

- ⇒ Deadline for sending this form to AARP is **January 31st**. Please mail the original, completed report in the enclosed Business Reply envelope or mail it to: AARP PO Box 93234 Long Beach, CA 90809-9602.
- ⇒ Please do not include any correspondence or other forms or information in the envelope. If you have questions, please email volunteer@aarp.org or write to AARP Office of Volunteer Engagement.
- ⇒ **Please do not send any bank statements, expense or receipt journals.** These should be kept by the chapter.
- ⇒ AARP no longer requires checking or saving account numbers.
- ⇒ You will be contacted **ONLY** if a report was NOT received from your chapter or if your chapter submitted an unbalanced report.

Thank You!

Chapter Dissolution, Withdrawal of Recognition, or Suspension

Voluntary Chapter Dissolution

AARP makes every effort to nurture its chapters. In rare instances, however, a chapter may not be able to attract enough new members and leaders to sustain its existence, or it may decide that the level of interest among existing chapter members has waned. In such situations, AARP's Office of Volunteer Engagement, working in conjunction with the state office, will provide assistance and guidance to the chapter as it attempts to overcome the obstacles to its continuation. If these efforts fail, and it is determined by a majority vote of the chapter membership that the chapter does not have the member support and participation necessary to continue, the next step is dissolution of the chapter.

The chapter must inform the AARP state office of its decision to dissolve voluntarily. The AARP State President may be asked to formally recommend that the chapter be dissolved. The recommendation is then routed to the appropriate state office for concurrence. After concurrence is received, the state office may obtain the records and files of the chapter and send them to the AARP Office of Volunteer Engagement at AARP's National Office headquarters. After receiving a recommendation for dissolution, Office of Volunteer Engagement provides the chapter with further procedural instructions for completing the process.

The dissolving chapter is responsible for contacting the office of the Secretary of State in the state in which it operates to ascertain what fees and forms are required to formally dissolve the corporation within the state. The chapter should request copies of the appropriate documents and forward them with a check payable to the Secretary of State in the specified amount. A copy should be provided to the AARP Office of Volunteer Engagement. (See also Article IX of the *Chapter Bylaws*.)

Withdrawal of Chapter Recognition or Suspension

Article IX of the *AARP Chapter Bylaws* provides that the AARP may withdraw or suspend recognition of a chapter as a local chapter of

K

Appendix K

AARP for:

1. Recurrent failure to conform to the policies and standards of AARP.
2. Failure of the chapter to comply with any of the provisions contained in the chapter's Articles of Incorporation or the *AARP Chapter Bylaws* ; or
3. Failure of the chapter to remain in compliance with the laws or regulations of the state in which the chapter is incorporated.

Such recognition shall be withdrawn or suspended only after consideration by AARP. Consideration of such a situation would normally follow a period of time during which AARP volunteers and staff would make every effort to remedy the situation and assist the chapter in conforming and complying fully with all policies, standards, chapter Articles of Incorporation, and *AARP Chapter Bylaws*.

When necessary, withdrawal or suspension of recognition shall become effective immediately upon the decision by AARP and notification of the chapter. In the event recognition is withdrawn and suspended, the chapter shall have an opportunity to be heard by AARP.

In addition, notwithstanding any other provisions of the chapter's Articles of Incorporation or the *AARP Chapter Bylaws* to the contrary, after withdrawal or suspension of recognition, all voting rights shall thereafter be vested solely in AARP, the national organization member of the chapter. The voting rights that would otherwise be vested in the individual chapter members shall cease, and AARP shall have the right to remove any officer or director, with or without cause, at any time.

Upon withdrawal or suspension of recognition, the chapter shall not, without express written consent of AARP, conduct its affairs or otherwise identify or hold itself out to the public as a local chapter or other affiliate of AARP.

The chapter's charter shall be turned over to AARP, along with all funds and any other property held by the chapter.

Where the law of the state of incorporation of the chapter permits, AARP, which is the national organization chapter member, may, at its discretion, legally dissolve a chapter after its recognition has been withdrawn.

The process for withdrawal of chapter recognition or suspension is as follows.

1. The chapter board of directors is responsible for the control and management of the affairs, property, and interests of the chapter, including enforcement of compliance with the *AARP Chapter Bylaws* and the chapter Articles of Incorporation.
2. If the chapter does not regulate its own conduct or the conduct of its members in accordance with the required procedures and AARP guidance, then the State President or State Director may recommend to AARP that the chapter's recognition be suspended or withdrawn.
3. Such a recommendation may be prepared after consultation with the State Director and the Regional Volunteer Director. The recommendation should be directed through the state office to the Office of Volunteer Engagement at the National Office and must contain the concurrence or recommendation of the Regional Volunteer Director.

The recommendation for suspension or withdrawal of recognition must contain documentation that substantiates that the chapter:

- Has evidenced recurrent failure to conform to the policies and standards of AARP.
- Has evidenced a failure to comply with any of the provisions contained in the Articles of Incorporation of the chapter or the *AARP Chapter Bylaws*.
- Has failed to comply with the laws or regulations of the state in which it is incorporated.
- Has been provided with sufficient oral and written warning of the situation and of the consequences of failure to accept recommendations for remedying the situation.
- Has been apprised of the situation in writing or by a meeting of the State Director with the chapter board of directors.
- Has advised its membership of the situation and acceptable recommendations to remedy it.
- Has been advised and assured that every effort has been made by the volunteer leadership as well as the state office of AARP to assist the chapter in resolving the situation.

Upon receipt of the recommendation, the AARP Office of Volunteer Engagement will notify the chapter President that the recommendation has been received and will review the recommendation. AARP may request additional information or may direct that further investigation be carried out.

If AARP decides to suspend or withdraw recognition, the chapter will be notified by the AARP Office of Volunteer Engagement, and that office will immediately take steps to accept all funds and other property held by the chapter.

If the recognition of a chapter is withdrawn or suspended, all funds and other property held by the chapter shall be paid over or transferred to AARP to be distributed to the AARP Foundation, other charitable organizations exempt under Section 501(c)(3) of the Internal Revenue Code, (including those affiliated with AARP), or for other charitable purposes at the discretion of AARP.

The chapter will be notified by AARP of its right to have an opportunity to appeal, and it will be requested to advise AARP within 30 days of its receipt of notification of suspension or withdrawal whether or not it wishes to have such an opportunity. If AARP receives such a request within the specified time deadline, that office will handle arrangements for the hearing. The chapter will be required to notify AARP Office of Volunteer Engagement in writing of:

- The name(s) of the chapter members who will represent the chapter at such hearing.
- A statement by the chapter's board of directors that such representatives were duly selected and authorized by the board to represent the chapter at such hearing.
- Requesting the opportunity to be heard and specifying the reasons why the chapter feels that suspension or withdrawal or recognition is not warranted.

If the recognition of the chapter is suspended, rather than withdrawn, AARP will notify the chapter of the conditions of the suspension and the time deadlines for complying with those conditions. Successful completion of suspension conditions may result in the suspension being lifted. Failure to comply with suspension conditions would result in withdrawal of recognition.

If, within 30 days of notification of withdrawal of recognition, the chapter does not request an appeal, or if the chapter requests an opportunity to be heard, and is heard, and the Board sustains its withdrawal action, the AARP Office of Volunteer Engagement will initiate appropriate action to dissolve or disaffiliate the chapter.

L

Appendix L

AARP Chapter Badge Guidelines

The AARP chapters are very important to AARP, and we thank you for all you do to strengthen your community and empower people to choose how they live as they age. AARP is proud to have you as one of the community “faces” for our Association’s Purpose/Mission and Vision.

We have a long history of service to people 50-plus and their families, and we recognize the profound contribution you make as an AARP chapter. These guidelines are designed to help you communicate the AARP brand and represent our shared commitment to service.

Why Brand?

An organization’s brand is in many ways its most powerful asset. It’s what people think of when they hear the brand’s name or see its logo. For the AARP brand, one of our most critical assets is the level of trust people place in us. We are a nonprofit, nonpartisan organization committed to empowering people to choose how they live as they age. Our founder, Ethel Percy Andrus, established AARP back in 1958 as a way to help retired Americans live with dignity, independence and purpose. And while the concept of “retirement” may be very different today, people 50-plus are seeking to grow, learn and discover, no matter their age. We want them to turn to AARP—as generations before them have—to help them discover and achieve *Real Possibilities* in their lives.

As one of our community faces, AARP chapters can help express the essence of the AARP brand, and this guide will help you understand and communicate what we call our “**brand voice.**” Brand voice may be a term of art you have not heard before, but when you think about it, every brand has a unique personality and voice. Consider your favorite fast food restaurant, for instance. It may serve burgers and fries but that is just a functional aspect of its brand. Emotionally—which is where it counts—the restaurant creates relevance and builds relationships with consumers by adopting a personality, in this case likely one of “family and fun.” Its personality is what dictates its brand voice and how it shows up in the marketplace.

Even though we are not a for-profit company, AARP is a brand with a distinctive personality and brand voice. Our brand unifies our orga-

nization, motivates our wonderful volunteers like you, and engages our members and the 50-plus community. When we speak clearly and consistently with “One Voice,” we help people truly understand who we are and what we do. We also make what we do more powerful and effective.

Given that everything we do and say is an extension of our brand, we are always considering how our efforts can further our purpose and vision and better connect with our members and local communities. The tools below will arm you with the same information we use to guide our actions and communications at state offices and National Office.

AARP’s Organizational Character

AARP’s Vision statement and the three elements of our organizational character—our Purpose, Role, and Values— are the foundation of our brand.

AARP’s Vision

A society in which all people live with dignity and purpose, and fulfill their goals and dreams.

AARP’s Purpose

AARP is dedicated to *empowering people to choose how they live as they age*. (Note: This replaces our old mission statement, “to enhance the quality of life for all as we age.”)

Our **Role**—“*everyday innovators in aging*”—describes who we are (as staff and volunteers), regardless of which part of the Association we work in or what our title is. We are all change agents and we recognize that aging is a constantly evolving concept.

Our **Values** (described below)—capture what we stand for, what we believe, and how we treat each other as well as those we serve, as an organization and as individuals. Our values are intended to guide how we show up and what we deliver so that our actions pay off on them. They can also be filters to guide how we make decisions and how we communicate.

Our Values:

- **Impact:** AARP creates real value for people in their day, their life, and in the wider world
- **Innovation:** AARP evolves and invents to meet the new realities of aging

- **Humanity:** AARP cares about people and serves them with compassion
- **Empowerment:** AARP uses its influence and resources to remove barriers and create possibilities
- **Honesty:** AARP acts and speaks with integrity in every action

The Real Possibilities Voice

The voice of *Real Possibilities* is the distinctive way we express our brand personality and our values to people outside the organization. When we talk about helping people discover and achieve Real Possibilities in their lives, we want both our tone and our words to be **new and fresh, unexpected, human, and unapologetic**. With this voice we can get people to see us in a new light, revitalize our brand, and increase perceptions that AARP is “for people like me.”

- **New and fresh** is a voice that’s innovative, original, and vibrant. It’s a great way to express the AARP value of innovation and our role as everyday innovators in aging.
- **Unexpected** is finding ways to surprise and delight, like when we spotlight dimensions of our story people don’t know about. You can hear it in the line we often use in ads—“you don’t know ‘aarp.’”[®]
- **Human** is talking like real people, and putting a personal face on AARP. With this voice we express our values of honesty and humanity, we inspire trust, and we show people we “get them.”
- **Unapologetic** is fearless, positive and a bit defiant. It means we’re proud to stand up for people 50-plus, and we’re going to change the conversation around aging so we embrace it as something to look forward to, not something to fear. This voice expresses our values of empowerment and impact.

Chapters and Our Visual Brand Identity

In addition to speaking with one voice, it’s important for us to show up with a consistent “look and feel.” This section covers appropriate use of visual branding elements such as trademarked names, logos, and colors to comply with AARP policies, branding guidelines, and the AARP Chapter Trademark Policy, as well as provide visual consistency across chapters.

Since 1958, AARP has owned and used specific trademarks and ser-

vice marks for a number of goods and services, including the AARP name. AARP has registered these marks with the United States Patent and Trademark Office. Appropriate use of our trademarks increases our brand value and aligns us all with the Association's vision, purpose and organizational character.

AARP chapters are separately incorporated entities that help further AARP's purpose of empowering people to choose how they live as they age. Because they are chartered entities of the Association, chapters are permitted to use the chapter badge as part of their corporate name as spelled out in these guidelines.

Protecting the AARP brand is a shared responsibility in which we all play a role. Inconsistent or inaccurate usage of the chapter badge or AARP trademark weakens our brand identity, causes confusion among consumers, and endangers the legal protections afforded to AARP trademarks. That's why it's vital to make sure that all activities and communications associated with our brand protect and enhance our overall brand identity.

Chapter Names Are Important

How your name appears to the outside world helps create a link to AARP's nationwide brand. To avoid confusion and align with our other community partners, use the chapter name configurations below. You may use any typeface that is legible, but for best legibility, a Serif typeface such as Times Roman is best for printed materials, and a Sans Serif (like Arial) is best for websites and other digital communications. A mix of uppercase and lowercase letters helps with readability and consistency. Two versions of the how the name and the badge should appear are shown here.

[Official Name] AARP Chapter [Official Number]

example: Deerwood AARP Chapter #4343

AARP Chapter [Official Number] [Official Name]

example: AARP Chapter #4343 Deerwood

Domain Names

When registering a Chapter for a website domain, use the configuration below for the domain name:

[Official Name] AARP Chapter [Official Number]

example: www.DeerwoodAARPChapter#4343.org or
www.DeerwoodAARPChapter.org

Showing How We're Related

To show how we're related visually, use the chapter badge with the descriptor text "AARP Chapters are separately incorporated affiliates of AARP." The text identifies the legal relationship that links chapters to AARP. The easiest way to show this relationship is to use the badge + descriptor text as a footnote websites and newsletters.

The descriptor text must always appear, but it does not need to be "locked up" with or appear right next to the badge. It can be at the bottom of a page or on the back of printed materials. It does not need to be included on promotional items (shirts, bags, etc.), and can be eliminated if there's not enough space.



AARP Chapters are separately
incorporated affiliates of AARP

At A Glance

Recommended Font: Times Roman or similar

Capital and Lowercase Letters

Colors PMS 485 Red
(93 Magenta 95 Yellow)
(213 R 43 G 30 B)
Black or White

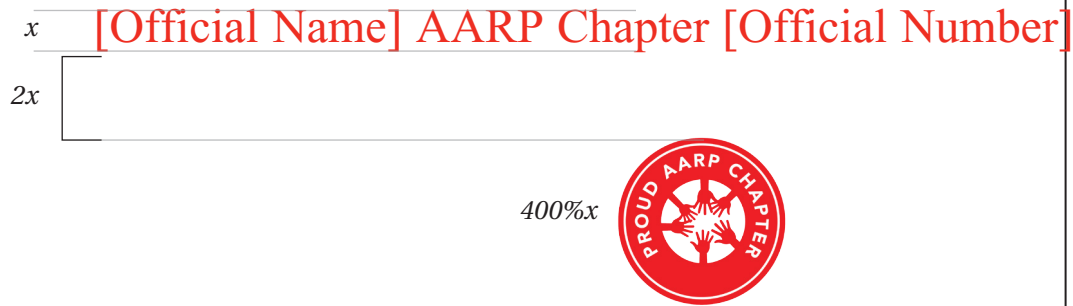
Badge + Chapter = Success

Linking the badge with the chapter name helps enhance our relationships in local communities. It both connects AARP with communities of citizens and strengthens chapters by linking them to the reach and successes of our nationwide organization. Use the spacing and sizing rules below to visually show these relationships.

The badge should be sized no larger than 400% of the cap height of the chapter name type and have a clear space equal to at least two returns. Whenever possible, the badge + chapter name treatment

should be in red (PMS 485)—see page 3 for specific color mixes—but all black or all white can also be used. To reinforce our brand identity, do not use any other colors.

PROPORTION AND MINIMUM SPACING



CORRECT APPLICATIONS

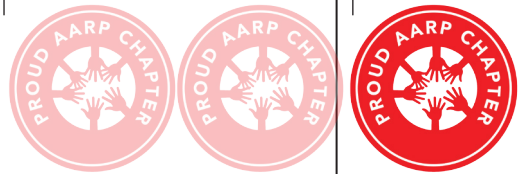
AARP Chapter #4343 Deerwood

2 returns of clear space before the AARP Chapter Badge



Clear space equal to two badges

AARP Chapter #4343 Deerwood



Using the Badge

The badge is designed to be easily placed on your communication materials. It is best used as minor visual element that identifies our relationship but does not restrict your local identity. As a minor element, its size should not dominate the page but should appear as a supporting element that anchors the communication. Again, it can be in red, black, or white.



Minimum clear space around the badge

$50\% x$

Badge Height = x





Minimum badge height = .75 inch

Examples of Badge Use

Talking to folks is what we do. When we communicate with members or people 50-plus generally, whether in print or online, we need to speak with one voice so we don't confuse our audience. We also want to make sure that your chapter voice comes through on all communications. Here are a few examples of how to use the badge in ways that show your connection to AARP while maintaining your local look and feel.

Correct Applications

Bowling Green-Warren AARP Chapter 1967

BOWLING GREEN-WARREN AARP CHAPTER NEWSLETTER

APRIL 20, 2007

UPCOMING EVENTS:

APRIL 21 NATIONAL DAY OF SERVICE	APRIL 22 NATIONAL DAY OF SERVICE	APRIL 23 NATIONAL DAY OF SERVICE	APRIL 24 NATIONAL DAY OF SERVICE
APRIL 25 NATIONAL DAY OF SERVICE	APRIL 26 NATIONAL DAY OF SERVICE	APRIL 27 NATIONAL DAY OF SERVICE	APRIL 28 NATIONAL DAY OF SERVICE


INSIDE THIS ISSUE:

VETERANS HISTORY PROJECT

The subject of the Veterans History Project is to collect and preserve service photographs, letters, articles, and documents from veterans of all conflicts from 1918 and through current war and conflicts. The names of all veterans will be preserved.

IF YOU ARE INTERESTED IN PARTICIPATING IN THE VETERANS HISTORY PROJECT, CONTACT:

NAME: [Name]
CONTACT: [Contact]
PHONE: [Phone]



Bowling Green-Warren AARP Chapter 1967

[Official Name] AARP Chapter [Official Number]

newsletter

UPCOMING EVENTS:

APRIL 21 NATIONAL DAY OF SERVICE	APRIL 22 NATIONAL DAY OF SERVICE	APRIL 23 NATIONAL DAY OF SERVICE	APRIL 24 NATIONAL DAY OF SERVICE
APRIL 25 NATIONAL DAY OF SERVICE	APRIL 26 NATIONAL DAY OF SERVICE	APRIL 27 NATIONAL DAY OF SERVICE	APRIL 28 NATIONAL DAY OF SERVICE


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[Official Name] AARP Chapter [Official Number]

newsletter

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[Official Name] AARP Chapter [Official Number]

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NAME: [Name]
CONTACT: [Contact]
PHONE: [Phone]



AARP Chapter

[Official Name] AARP Chapter [Official Number]
City, State

Addresser's Name
Addresser's Title
Business Address
City, State Zip Code

Dear Addressee:

When typing a letter, follow this page as a guide. This letter is an example of the typical format for letterhead. The clean, organized structure of the flush left format gives our business communications a highly professional profile. Type all body copy in 12 point Times New Roman, upper and lowercase, on 15 pounds of leading.


Use left margin of the page at 1" and the right margin at 1.5". Type the date 4.17 from the top of the page. Skip two lines before typing the addressee's name and flush left with the date line. Skip two lines between the salutation and the body of the letter.

Do not indent at the beginning of paragraphs, and always skip one line between paragraphs. Having completed your letter, skip one line before the closing. Then skip three lines between the closing and the addressee's typed name in all caps. Skip one line between the closing and the addressee's typed name and the typed name.

Sincerely,

Sender's Name

S/N: [Name]



AARP Chapter

[Official Name] AARP Chapter [Official Number]
City, State

Addresser's Name
Addresser's Title
Business Address
City, State Zip Code

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Sincerely,

Sender's Name

S/N: [Name]



Friends and Other Relations

To avoid relationship confusion, the AARP Trademark should not be given to any other organization.

Correct Applications

**AARP Chapter #4343
Deerwood**

What is AARP?
AARP is a nonprofit, nonpartisan association dedicated to shaping and enriching the experience of aging for our members and for all Americans. Founded in 1958 by retired educator Dr. Ethel Percy Andrus, we are today the nation's largest organization of middle and older persons, with more than 30 million members.
AARP Membership is open to anyone age 50 or older, whether working or retired. Members receive Modern Maturity, a full color bi-monthly magazine that features health, consumer, and financial news and information, as well as entertainment and travel updates. Members also receive the monthly AARP Bulletin in addition to our local Chapter 2195 Newsletter, which offers information on issues affecting Antelope Valley Seniors.

Please enjoy our website and [contact us](#) for further information.

Would you care for a little music to accompany your visit?
Please click on the flag!

AARP Chapters
Palmdale Chapter 2195
Palmdale, California
661-267-5551

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Terms You May Need

Glossary of Terms

EPS (encapsulated post script file)

Used primarily for professional reproduction in all print applications, files can be enlarged and reduced without loss of quality. These files cannot be opened without appropriate illustration software, but can be placed as a picture within Word or PowerPoint.

JPG (joint photographic experts group)

A photographic file used for online application, such as a website. It cannot be used larger than 100% without loss of resolution and may not look “crisp” when professionally printed. Images can be placed as pictures within Word or PowerPoint. They often open for viewing using a standard picture viewer.

PNG (portable network graphics)

Similar to a JPG, this format works well with PC-based documents such as Word. It tends to print “crisper” and format better in electronic documents.

Electronic Format

Any file that can be attached to an email or sent to a third party via the Internet.

PDF (portable document format)

A document created using Adobe software that converts a series of pages into a transferable format that can be opened by any computer, using an Adobe reader. Documents can be as simple as a two-sided sheet of paper or as complex as multi-page books. Some formats of PDF documents are created specifically for professional printers. Not all PDF documents are formatted in this manner, especially those attached to websites.

Electronic versions of the logo are available in EPS, (professional printing), JPG (website), and PNG (Microsoft® Word or Office) format. Please refer to the *Chapter Handbook* for further explanation of Chapter mission, goals and affiliation with AARP.

AARP Trademark

The “AARP Trademark” refers to the AARP name and/or Badge.

AARP State Offices

Alabama

201 Monroe Street, #1880
Montgomery, AL 36104
Office: 1-866-542-8167
Fax: 334-954-3050
alaarp@aarp.org

Alaska

3601 C Street, #1420
Anchorage, AK 99503
Office: 1-866-227-7447
Fax: 907-341-2270
ak@aarp.org

Arizona

16165 N. 83rd Avenue, Suite 201
Peoria, AZ 85382
Office: 1-866-389-5649
Fax: 602-256-2928
aarpaz@aarp.org

Arkansas

1701 Centerview Drive, #205
Little Rock, AR 72211
Office: 1-866-554-5379
Fax: 501-227-7710
araarp@aarp.org

California–Pasadena

200 S. Los Robles Ave., #400
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Fax: 626-583-8500
caaarp@aarp.org

California–Sacramento

1415 L Street, #960
Sacramento, CA 95814
Office: 1-866-448-3614
Fax: 916-446-2223
caaarp@aarp.org

California–San Francisco

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San Francisco, CA 94108
Office: 1-866-448-3615
Fax: 415-986-3467
caaarp@aarp.org

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303 E 17th Avenue, #510
Denver, CO 80203
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Fax: 303-764-5999
coaarp@aarp.org

Connecticut

21 Oak Street, #104
Hartford, CT 06106
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Fax: 860-249-7707
ctaarp@aarp.org

Delaware

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Fax: 302-571-1984
destate@aarp.org

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Fax: 202-434-7710
Dcaarp@aarp.org

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Office: 1-866-595-7678
Fax: 954-438-7871
FLAARP@aarp.org

M

Appendix M

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Fax: 727-369-5191
FLAARP@aarp.org

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Office: 1-866-595-7678
Fax: 850-222-8968
FLAARP@aarp.org

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Fax: 404-881-6997
gaaarp@aarp.org

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Fax: 773-714-9927
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Illinois–Springfield

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Fax: 217-522-7796
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ksaarp@aarp.org

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Office: 1-866-554-5380
Fax: 207-775-5727
MEaarp@aarp.org

Maryland

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AARP is the nation's largest nonprofit, nonpartisan organization dedicated to empowering Americans 50 and older to choose how they live as they age. With nearly 38 million members and offices in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP works to strengthen communities and advocate for what matters most to families with a focus on health security, financial stability and personal fulfillment. AARP also works for individuals in the marketplace by sparking new solutions and allowing carefully chosen, high-quality products and services to carry the AARP name. As a trusted source for news and information, AARP produces the nation's largest circulation publications, *AARP The Magazine* and *AARP Bulletin*. To learn more, visit www.aarp.org or follow @AARP and @AARPadvocates on social media.





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