



## **AIRLIFT/TANKER ASSOCIATION**

### **CHAPTER HANDBOOK**

Final - As of 16 August 2017

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## INTRODUCTION

The general membership of the Airlift/Tanker Association is structured into Chapters which are located within our communities throughout the world. Each individual Chapter is responsible for carrying out those activities and programs that enhance the purpose and objectives of the Association. People are the heartbeat of our association and the chapter is the first step in the chain. You can maintain the pulse.

*“I know of no other private organization affiliated with the US Air Force that does a better job of bringing a community of professionals together. If you touch the mobility mission in any form or fashion you are considered part of the ATA family. From our youngest Airmen to our very most senior officers, ATA is the one place where they can meet face to face in an informal setting...whether at a local chapter meeting or at our annual symposium...this is an organization that enables that type of camaraderie and personal interaction.”*

*Lt Gen Vern “Rusty” Findley, USAF (Ret)  
Airlift/Tanker Association (ATA)  
Senior Vice President*

## **SECTION I NEW CHAPTER ESTABLISHMENT**

### **CHAPTER FORMATION**

As the first criteria in forming a new Airlift/Tanker Association Chapter, you must have a minimum of twenty (20) people who are members of the Airlift/Tanker Association. Initial contact should be directed to the Senior Vice President, (see email list at Appendix 7) who will provide a Chapter Handbook. Once a prospective chapter has received its handbook and its completed application portfolio is ready based on guidelines in this booklet, the application should be forwarded to the Senior Vice President for further processing (See the Chapter Status memo at Appendix I). Assuming that the application portfolio is completed properly and is favorably endorsed by the National Board of Officers and the Chairman of the Board grants the establishment of the chapter, a charter will be prepared, presented at an appropriate presentation, and all charter members will sign the charter, (see Appendix I).

### **NEW CHAPTER START-UP PACKAGES**

This package is designed to give new Chapters examples of those critical steps required for the completion of an application portfolio. The following guidelines are recommended:

Upon receipt of the start-up package, process all follow-on actions as directed by the Senior Vice President. Chapter start-up packages include the following items:

- Association chapter handbook
- Sample copy of Chapter Initiation memo to Sr/VP, (see Appendix II).
- Sample copies of chapter by-laws, (see Appendix III).
- Membership forms or join over the A/TA webpage

### **CHAPTER NAME SELECTION**

Selection of a Chapter's name is at the sole discretion of the charter members. The proposed chapter names should be forwarded to the Senior Vice President for National Board consideration and approval. Chapters have historically been named after outstanding individuals, geographical areas, and significant historical events. (Keep in mind that approval may have to be obtained from a copyright owner, intellectual property or from a particular family.) A change of a chapter's name may be appropriate in rare instances. A chapter requesting a change should forward the rationale for that change and the proposed new name to the Senior Vice President who will present the proposal to the National Board for approval.

## **CHAPTER BY-LAWS**

The Chapter members may adopt chapter by-laws and procedures, or they can delegate that authority to the elected officials and members. Chapter By-Laws must be consistent with the Association's By-Laws and with the policies, purposes and objectives of the Association, (see Appendix XX).

## **CHAPTER OFFICIALS**

Chapters shall elect, as a minimum, the following officials: President, Vice President, Secretary, and Treasurer. The Chapter is responsible for furnishing the names of these individuals to the Senior Vice President and the Association's Database Manager and Registrar. Changes to the list need to be updated with the Senior V/P and Registrar as quickly as possible. Updates of names for key positions are also a responsibility of all individual Chapters. And, these officers must be current national Association Members.

Note: The Chapter Name, By-Laws, and the names of the officers are minimum requirements of the application portfolio.

## **CHAPTER LOGO**

A Chapter logo is optional and is at the sole discretion of the individual Chapters. A Chapter's President should forward the logo request to the A/TA National Board Senior Vice President for presentation and acceptance.

## **CHARTERING CEREMONIES**

An approved charter will be presented by the Chairman of the Board of Officers (or his designee) at a Chapter-sponsored event or at the A/TA Annual National Convention. Coordinate this ceremony with the Senior Vice President.

## **CHAPTER DEACTIVATION**

The A/TA Board will determine when an individual Chapter should be considered for deactivation upon the recommendation of the Senior Vice President.

## **CHAPTER MEMBERSHIP**

Each local chapter member must first be a member in good standing of the A/TA National organization.

## **CORPORATE CHAPTERS/MEMBERSHIPS**

All corporate membership/charters shall be processed directly with the A/TA National Board Vice President of Industry Affairs. Corporate membership packages can be obtained and appropriate information furnished upon request.

The contents of this package will include the following items:

- General instruction letter
- Association by-laws
- Membership forms
- List of current corporate members
- Corporate applications form
- Miscellaneous forms

## **SECTION II CREATE A CHAPTER ORGANIZATION**

### **INTRODUCTION**

Organization is a critical part of chapter success. Over the years, the Airlift/Tanker Association has witnessed tremendous differences and inconsistencies in chapter operations. Some seem to be well organized and successful every year, while others experience great peaks and valleys in chapter effectiveness and member participation and enthusiasm. The National Board of Officers has intentionally given chapters "wide latitude" in the conduct of their affairs, a policy that remains unchanged with the publication of this document. Communication between chapters and sharing of ideas, programs and projects is strongly encouraged.

Success is built on the experiences of current and former chapter officers, along with some new ideas and emphasizes a common sense, practical approach to running a chapter. New chapters can gain from this guide as they develop or review their existing principles; we hope it offers some suggestions for enhancing and establishing chapter operations. Improving the way we communicate and interact as members and chapters is a recurring theme, and rightly so, for our Association is made up of people whose shared experience is the source of our strength.

We welcome your suggestions for improving and adding your experiences to this handbook. Please pass on your comments and ideas to the Senior Vice President. In addition, we plan to initiate a staffing cycle where you will be asked for recommended changes or comments.

### **SECTION III ESTABLISH A PERMANENT PRESENCE**

The first and most important key to a Chapter's health and long-term success is to establish and maintain a point of contact. A floating organization will do just that – float. A permanent address provides the anchor that allows a Chapter to weather changing times and the high and low tides of member enthusiasm and participation. It also enables the organization to maintain consistent ties with Chapter members, and allows effective two-way communication with the Airlift/Tanker Association National Board of Officers and other Chapters. This is a critical question that each Chapter must ask itself to determine what arrangement satisfies its needs most.

**E-mail Address List:** We all use e-mail to stay in contact. Should your chapter Secretary's or President's e-mail address be the chapter contact point? Or, do you prefer a Chapter e-mail address? Do you need a membership address list with email addresses, phone numbers, etc.?

**A Webpage:** A webpage may be a great way to communicate with membership or recruit new members. Individual chapter pages are encouraged and are independent of the Airlift/Tanker Association webpage. However, we request that you notify the A/TA National level so a link can be added from our webpage. This will provide a link for someone interested in your local chapter and provide an opportunity to connect to your local chapter through the A/TA website.

**Facebook Page:** Facebook can be a good tool for communicating with and keeping members informed of chapter activities. This tool can add two-way communication and offer the opportunity to gain input from your membership. However, some members may choose not to use Facebook and we must insure all members get current information.

**LinkedIn/Twitter:** Many use other electronic communication tools such as LinkedIn. Any of these tools should be used based on what is most effective for the chapter.

**The Office Address:** Another methods source of long-term stability can be providing an office address for the Chapter's use as a permanent address. This usually implies a willingness to support many of the Chapter's administrative needs, a commitment not to be taken lightly! This arrangement may also provide the added benefit of a permanent Chapter phone number. The permanence of this method, however, depends heavily on the longevity of office personnel – if the commitment won't last beyond the present management, then don't choose this option!

**Examples:** In a large headquarters staff, the office that deals primarily with air mobility issues is a logical choice. Or, if most Chapter members belong to a single organization (i.e., a tenant unit on a non-mobility base), then it may be convenient to “align” the Chapter with the organization, as long as it doesn’t hinder others from joining. A civilian employee, industry representative, local business, or retiree may also be willing and able to provide long-term Chapter support.

Again, each Chapter must decide what arrangement suits it best. Above all, seek permanence – the key point here is don’t move the Chapter address around with elected officers; it damages Chapter credibility by hindering communications.

**Make it official: Become a Registered Base/Community Organization.** Most bases and communities maintain rosters of local organizations for informational and referral purposes. In some cases, registration is mandatory if you wish to use base, community, or other public facilities. Joining the local network of community organizations also serves two other purposes: it proclaims the Association’s existence in the community, and provides Chapter points of contact for public distribution. To determine which procedures the Chapter must comply with, start with the base Morale, Welfare, and Recreation (MWR) office, or the local Chamber of Commerce.

## **SECTION IV CREATE AN EFFECTIVE ORGANIZATION**

Chapter Officers and Responsibilities - The second key to Chapter success is elementary – a well-structured organization with clearly designated management responsibilities will effectively accomplish its goals and those of the Association. Whether your Chapter is large or small, a sound organizational structure will also provide your members the opportunity to participate, to contribute, and to lead. While each Chapter is free to choose the organizational structure that works best here are some ideas and suggestions that have proven successful in the past.

Depending on its size and the scope of its activities, a Chapter may choose to have some or all of the following officers, or combine some positions together. As a minimum, each Chapter should have a President, a Vice President, a Secretary, and a Treasurer. While each Chapter will determine its officers' specific responsibilities, their primary duties should include at least the following:

### **President:**

- Represents the Chapter as its official spokesperson
- Presides over Chapter board meetings and membership meetings
- Leads Chapter-planning activities
- Communicates regularly with the Board of Officers

### **Vice President:**

- Assists the President
- Acts as President when that person is unavailable
- Performs other duties as assigned by the President

### **Secretary:**

- Records and provides minutes of all Chapter meetings
- Responsible for receiving and sending Chapter correspondence and reports
- Ensures membership roster is current, with changes forwarded to A/TA Secretary

### **Treasurer:**

- Maintains Chapter finances, collecting and disbursing all Chapter funds
- Provides financial reports to Chapter Board and members

### **Other Chapter Officers/Committees and Duties:**

Several other functions are so important to a Chapter's success that additional Chapter officers and/or committees might need to be identified to take responsibility for them. This helps to distribute the workload among more individuals, and provides additional opportunities for Chapter involvement.

Three areas in particular – publicity, membership and programs – are critical, and must be emphasized accordingly:

Publicity - Extensive communications are essential, and a strong publicity program will ensure membership participation, enhance your Chapters reputation, and inform all members of Chapter activities. The publicity officer/committee is responsible for producing Chapter newsletters, posting and distributing event flyers, sending articles and announcements to local publications, and other related activities.

Membership - Maintaining Chapter membership is a challenging, and sometimes frustrating task, exacerbated by the mobility of Association members. The membership officer/committee maintains the Chapter membership roster, forwards changes to the Secretary and reconciles differences in the Chapter and Association database. In addition, they may organize membership drives and membership recognition programs. In smaller Chapters, the secretary may perform these duties.

Programs - The Chapter officer/committee responsible for programs will plan events, solicit guest speakers, and organize projects undertaken by the Chapter, among other duties.

Section Leaders - Some Chapters have organized themselves into sections to facilitate communications and allow greater individual involvement. This method is especially effective for large Chapters or those with membership spread across several organizations. Section leaders serve as a central point of contact within a group and a conduit for information to Chapter members. Some potential section leader areas include:

- Individual base units
- Off-base civilians
- Industry representatives
- Retirees
- Chapter Affairs

**Chapter Board Meetings:** Board meetings can be held at any interval, but should occur prior to each major Chapter meeting or event as a minimum. Use them to plan events and to pass information on to members through the section leaders. Participation may include Chapter officers, committee chairs, section leaders, and any other members who wish to attend.

**Chapter Meetings/Events:** First and foremost, have “events” rather than meetings – we all attend enough meetings as it is – but plan to conduct Chapter business as an event too! Take advantage of any event to make announcements, introduce guests and take care of other Chapter matters (see sample meeting agenda).

**Chapter Finances:** Chapter operating funds can be obtained through local dues, fundraisers, donations from members, donations from local businesses, or from add-ons to pay events. While local dues can generate funds, they can be difficult to track, but donations can be collected and is a good choice. Fundraising events can be fun, and contribute to Chapter cohesiveness because they involve members directly (i.e., golf tournaments, car washes, etc.). Donations can also be a source of funds, door prizes, etc., but may require a good deal of individual or Chapter effort to obtain. A very effective and ‘invisible’ source of funds is to add a small premium at pay events, such as a small extra charge for a luncheon. This is an easy and relatively “painless” method of raising funds.

The Airlift/Tanker Association is a non-profit, tax-exempt organization, whose status extends to local Chapters. For the Association’s tax identification number, or for advice on Chapter financial affairs, contact the Treasurer. Funds and budgets are important functions, and can quickly cause unnecessary issues. It’s recommended you have two signatures on any disbursements, checks and financial actions. (For additional information on financial topics see Appendix 4).

**Elections:** Chapter officers must be volunteers. Announce Chapter elections far enough in advance to allow nominees and volunteers to be identified.

**Recruit capable Chapter officers,** but avoid “figurehead” leaders who may not have the time or the desire to serve as Chapter officers – it does neither them nor the Chapter any good, and may deprive others of an opportunity to lead. A single slate of officers may be elected by acclamation or voice vote, but competitive elections should take place with private ballots. Only active Chapter members are allowed to vote. Be sure to **send a list of new officers to the Secretary and the A/TA Registrar.**

## **SECTION V PLAN FOR SUCCESS**

Chapter planning is essential for success. A well-organized Chapter establishes a vision, mission, goals, and objective and maps out its activities in advance, and assigns specific responsibilities to committees, sections and individuals to help it achieve its objectives. You can review the A/TA Vision, Mission and Goals at the A/TA websire. Your Vision, Mission and Goals should support the National Organizations.

**Begin by determining interest:** Work your way up your leadership chain and keep them informed of your progress. Initially, gaining leadership interest makes your effort much easier. You should perform a market survey within the units of your wing to determine interest among your people. There are a number of tools you can use, such as copies of Airlift/Tanker Quarterly (A/TQ) magazine, there is a “This is the A/TA” video and hardcopy handouts. To track the membership in your local area you can make contact with the A/TA Registrar and ask for a spreadsheet for your local area. This search is performed by postal zip code and is provided electronically. That information will confirm who is current and who’s not. This can be used to remind your membership that they need to pay dues or renew membership and is a great tool.

**Establish Chapter Goals and Objectives.** When new Chapter officers assume their duties, they should determine what the Chapter wants to achieve in the coming year. How often and when will meetings be held, what types of projects and events it will sponsor, fund-raising targets and membership goals are all items to consider when establishing a chapters goals and objectives.

**Develop a Flexible, Yearlong Plan.** Advance planning based on a good foundation (who, what, when, where, why and how) fosters Chapter success by focusing chapter activities and raising member expectations.

**Choose a regular day of the month or quarter to hold Chapter meetings/events,** for example, the 2nd Tuesday of each month or quarter. This establishes a benchmark for planning, and allows members to work meetings into their schedule.

**Make early decisions** on when to hold special events, especially when booking guest speakers or making reservations for golf tournaments, sporting events, and the like. This allows time for senior leadership to support events without calendar conflicts.

**Plan Events Meticulously.** Once event dates are determined, specific planning can get underway. Many organizations use checklists to ensure all the details of events are covered, such as room arrangements, protocol, audiovisual requirements, etc. These steps prevent any unexpected surprises. After identifying projects and tasks, assign responsibilities to specific individuals or committees to establish working relationships and prevent duplication of effort.

**Set timelines for task completion**, commonly known as a suspense, and follow up on them to ensure success.

**Work as a team** – no one individual can do it all, and the insights, experience, and assistance of others is always a plus.

**Communicate, Communicate, and Communicate!!! Coordinate, Coordinate, and Coordinate!!!**

Effective communications and coordination is a cornerstone of chapter success. Regular contacts with chapter members, the Board of Officers, and other chapters will generate excitement and enthusiasm for the Association and help achieve your objectives.

Chapter members must be kept up-to-date on chapter activities and events if they are to participate and contribute, thereby making the chapter successful.

**Monthly or quarterly newsletters** are valuable communication tools, as they can be used to share information, announce events, and provide Chapter points of contact. Newsletters also serve as hard copy reminders for upcoming events and keep members informed when they are unable to attend meetings.

**Electronic mail and phone and other reminders** from section leaders prior to meetings or events encourage attendance and participation as well. Again, good advance planning, with meetings at regular intervals, raises member expectations and gets Chapter activities added to personal schedules earlier. The National Board of Officers can help Chapters in many ways and enjoys hearing from individual members and Chapters. Keep them informed by sending them newsletters, quarterly reports, and election results. Invite them to special events, as many Board members are enthusiastic guest speakers when their schedules permit.

**Include Airlift/Tanker Quarterly** on your mailing list as well, for the editor publishes a section on chapter activities.

**Chapter activities:** Shared information between Chapters can be a great source of ideas that contribute to Chapter success. Send them your newsletters (put them on your mailing list) and request their newsletters (get on their mailing list).

**Stay visible through publicizing Chapter events:**

Publicizing Chapter events serves multiple purposes and your Public Affairs (PA) office will possibly provide recommendations. It announces your existence, keeps members

informed, and helps to attract new members. There are many avenues available to publicly announce chapter activities, including:

- Newsletters
- Flyers
- Articles in base and community papers
- Base Bulletins, building circulars, and other regular announcements
- Organizational meetings (Wing stand-up, Commander's Calls, etc.)
- Electronic mail announcements (use with discretion – check local procedures)

Small strategically located displays are a great way to spread the word about the Association and its activities. One approach is to showcase air mobility heritage by gathering memorabilia or pictures and arranging them in a case or wall display under Chapter sponsorship. Be sure to display membership brochures and *Airlift/Tanker Quarterly* magazines where they can be seen and read.

Community service projects reflect well on the association and provide opportunities for member involvement and interaction. Projects can take many forms, from base beautification and community volunteer work to fundraising for scholarships and charity. One successful technique is for a Chapter to pick a long-term or annual project and focus on it. Some examples are projects to create a museum or aircraft display, or sponsoring annual events like the Special Olympics. Also, be alert for other short-term opportunities that allow the Association to show its colors.

## SECTION VI RECRUIT NEW MEMBERS

New members are the future lifeblood of the Association, and recruiting them is a vital Chapter function. Our Association is an open organization, with everyone interested eligible to join. **Encourage Potential Members** by making all Chapter events open to the public, and stimulating members to bring friends and co-workers to them. Be sure to **invite those in key leadership positions** to attend, for their support adds credibility and strength to Chapter affairs. If you get the leaders to come, the rest will follow. **Provide displays and/or presentations at base INTRO or New Comer Briefings**, which is a great way to reach out to newly arriving members or prospective recruits. Another idea is to start a sponsor program, where a Chapter or section may pay initial membership fees to reward and recruit outstanding performers, award winners, and other worthy individuals we desire in our Association. Some Chapters **interact with other groups**, including military associations (AFA, NCOA, NGAUS, AFCE, ROA, Daedalians, etc.) and base or civic leader organizations. Smaller Chapters have found success by holding joint or combination meetings with groups such as these that share common interest.

## SECTION VII TAKE CARE OF YOUR MEMBERSHIP

Successful Chapters nurture their members and encourage their involvement in many ways. One of the most important is to **keep them informed** through all the communication vehicles mentioned in step 4 above. In addition, to achieve one of the Association's primary aims, activities and events should be geared to **provide for professional growth**. Guest speakers, seminars, and other events are ideal venues for gaining greater knowledge and understanding of air mobility issues, or for interacting informally with current and past mobility leaders. Above all, **make the Chapter fun!** Mix meetings and formal events with recreational outings and other informal events. Two especially critical functions are how we **welcome new members and keep membership rolls** updated. New members should be personally contacted and welcomed by the President or other Chapter officer. The Secretary must also monitor changes in member rank, address, or duty status as much as possible to relay to the A/TA Secretary. In addition, the Chapter Secretary or membership officer/committee must **track expiring memberships and encourage renewal** through personal contact.

### **Provide for Your Successors**

Ensuring a proper transition to new Chapter officers is a critical, but often-overlooked task that impacts year to-year Chapter effectiveness. The best way to provide for your successors is to **create a continuity book** of Chapter information and materials that will guide Chapter management. It should include some of the following, as a minimum:

- A copy of the Chapter Handbook.
- Meeting minutes (at least one year worth).
- Copies of newsletters, flyers, and other communications.
- Project notes, records, and lessons learned.
- A current membership roster.
- Important phone numbers and addresses (Board of Officers, other Chapters, local contacts, etc).

Finally, meet with newly elected officers to bring them up to speed, and allow them the opportunity to ask questions of the current officers.

## **Support for the Annual A/TA Convention**

The annual convention is the highlight of the Association's activities, with support and attendance from members essential for its success. Chapters are encouraged to **get involved in convention planning activities**, including the submission and presentation of symposium topics, registration activities, and other support needs. **Send a delegation** to the convention to represent the Chapter and participate in all convention activities. Finally, **encourage membership participation** by passing on convention information, getting leadership support for official travel, and arranging for group transportation, if feasible.

## **Above All, Remember and Support Our Purpose**

“The Airlift/Tanker Association is a non-profit professional organization dedicated to providing a forum for people interested in improving the capability of air mobility forces.”

## SECTION VIII CHAPTER PROGRAMS AND THEMES

The vitality of a Chapter can be measured by the strength of its programs and themes. A properly oriented and lively Chapter program provides a stimulus to membership, and helps to achieve Association goals and objectives. In planning Chapter programs, it must be kept in mind that we are a non-profit professional organization dedicated towards improving the capability of air mobility forces and identifying and encouraging future leaders. Ideally, Chapter programs should be oriented toward professional education or the current status of mobility-related programs and issues. Programs and themes should support A/TA Goals and Objectives:

### **Establish air mobility forces and the support adequate to fulfill the assigned mission of the United States military forces in inter-theater and intra-theater operations.**

- To provide an organization through which men and women may unite to fulfill the responsibilities imposed by aerospace technology on modern society.
- To commemorate the services rendered by industry, military and government personnel in the Airlift/Tanker activities in which the United States or its allies have been or may become engaged.
- To promote scientific and academic research towards the further development of the Nation's mobility capabilities.
- To conduct and sponsor speaking engagements, seminars, symposiums, conventions, and public forums which support the advancement of all aspects of Airlift/Tanker and community relations.
- To encourage young men and women to participate in aerospace and Airlift/Tanker activities.
- To support research and advancement of related aerospace activities through scholarships and financial loans or grants.
- To encourage an exchange of ideas and provide for interaction between the Department of Defense and industry.
- To support efforts to establish and maintain the proud heritage of air mobility.

### **Program Ideas**

A diverse Chapter program will appeal to the interests of all members, with a good mix of on-base and off-base events that provide opportunities for both social interaction and professional growth:

- **Briefings or presentations** on current mobility subjects, programs and issues.
- **Air mobility heritage recognition**, including films, personal recollections, or memorabilia displays.
- **Field trips** to base facilities, museums, industrial plants, aerospace agencies, etc.
- **Guest speakers** on topics such as leadership, professionalism, or mobility operations and plans.

- **Social or recreational events** like golf tournaments, professional sports outings, or civic events.
- **Community service projects**, including base/community beautification, providing volunteers for or sponsoring special events, and charity fund-raising.
- **Joint meetings** with military groups like Daedalians, Air Force Association, National Guard Association of the United States or local veterans groups.
- Combining any of these programs with a sit-down meal or reception promotes esprit de corps and adds further variety to the event. Always prepare an agenda to facilitate the flow of events, introduce guests, and conduct other Chapter business.

### **Sources of Material and Speakers:**

Interesting and informative guest speakers can be found to address a variety of air mobility subjects. Before you extend a formal invitation, especially to a senior officer or other busy individual, make sure that their schedules will allow it and an informal invitation has been accepted. Don't send uncoordinated invitations – you may unnecessarily put yourself in a bind as you wait for a response. Contacting an executive officer or secretary is a good place to start and then follow it up with a written invitation confirming the date, time, and subject of their presentation.

Here are some potential sources of guest speakers and how you might reach them:

**Local Chapter members:** Seek those with special expertise, leadership or operational experience.

### **Local base and community organizations:**

**Air Force Major Command Headquarters:** Coordinate through the local Chapter, the Association Major Commands representative, or the Vice President Active Duty Affairs.

**Air Force Reserve and Air National Guard Organizations:** Work with local AFRC or ANG representatives.

- **The Pentagon**, including the Air Staff, Joint Staff and Department of Defense offices. Contact the Capital Chapter for assistance.
- **Industry Sources.** Your local industry representatives or the Vice President Industry Affairs may recommend potential speakers, subjects, or contacts.
- **Board of Officers.** Contact each individual directly for availability.
- **Other Services or Military Organizations.** Look for air mobility customers like the Army and Marines to gain their unique perspectives, or invite speakers from military-oriented organizations like the American Legion, Veterans of Foreign Wars or other local or national groups.
- **Retirees** with noted experience and/or "war story."

Treat any guest speaker, regardless of rank, as a **VERY IMPORTANT PERSON**. They have volunteered their time and energy for the benefit of the Association, and we should recognize them for it. It's recommended that an escort be assigned to any VIP guest and use a checklist to ensure important steps are not overlooked. Be aware of and observe general rules of protocol, and a small memento or gift from the Chapter is an appropriate and meaningful way to honor them.

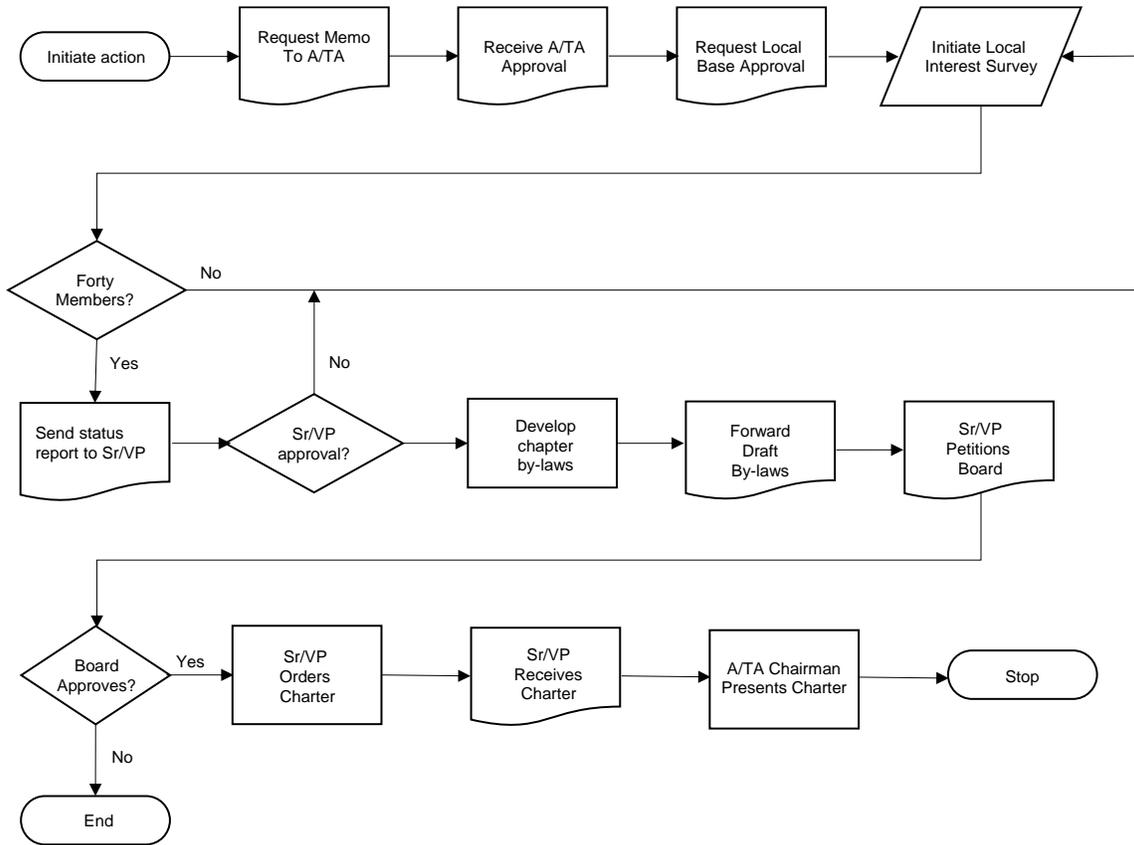
## **SECTION X FINANCIAL MANAGEMENT**

Chapter financial management should be based on “Standard Accounting Practices.” These principles can be simple and easy and can be managed using several software programs. Many large government budgets are sometimes managed using Excel software. This is not something that needs to be difficult.

It is recommended that any financial management be handled by at least two people; this includes counting and disbursing funds. A generally accepted practice is to require two signatories for disbursement. These actions prevent questions about financial management in most cases.

If you have related questions or need input feel free to contact the Airlift/Tanker Association Treasurer, (see appendix 4).

## APPENDIX - I - CHAPTER START-UP PROCESS FLOWCHART



**Close coordination with the Senior Vice President and use of the Chapter Handbook is critical throughout this process.**

**APPENDIX - II - STANDARD CHAPTER START-UP MEMO**

Current Date

MEMORANDUM FOR AIRLIFT/TANKER (A/TA), SR/VP A/TA  
BOARD OF DIRECTORS IN TURN

FROM: Rank, First Name, Middle Initial, Last Name, Unit/Office Symbol, Address

SUBJECT: Charter of the *Insert chapter name* Chapter, Address/Base/Location,  
State

1. It is requested that the Airlift/Tanker Association, Board of Directors, review the status of requirements and consider chartering local chapter at *Insert Installation and Location, State* under the name *Insert chapter name* Chapter.
2. Our local market survey has indicated there is the required number of personnel with intention of becoming charter members. In addition, we have fulfilled the portfolio of requirements set forth by the "Airlift/Tanker Association Chapter Handbook." This includes providing chapter name, selection of chapter officers, chapter charter and chapter membership list.
3. Included are the required documents and list of officers by position, (see attached).

First Name, Middle Initial, Last Name  
CHARTER PRESIDENT, A/TA, *Insert chapter name* CHAPTER  
Rank, USAF

# APPENDIX – III - STANDARD CHARTER, CONSITTUTION AND BY-LAWS

(DRAFT STANDARD DOCUMENT)

CONSTITUTION

AND

BY-LAWS

for

*Insert chapter name*

of the

AIRLIFT/TANKER ASSOCIATION, INC

**THIS DOCUMENT CAN BE MODIFIED TO MEET THE SPECIFIC CHAPTER REQUIREMENTS.**

CONSTITUTION

**GENERAL PROVISIONS**

**Reference**

The Airlift/Tanker Association, Inc. By-Laws, 22 February 2017

**Section 1 - Name**

The name of this organization shall be the *Insert chapter name* Chapter of the Airlift/Tanker Association (A/TA), Inc. hereinafter referred to as the *Insert chapter name* Chapter.

**Section 2 - Chapter Purpose**

The *Insert chapter name* Chapter purpose is to provide an avenue to enhance the mobility mission outside normal operational channels. Similarly, the chapter will provide a forum from which members can "lead from below," affecting the course of mobility options. In addition, the chapter will serve in a special support role to the commander, as he/she sees fit, and in support of special events.

**Section 3 - Officers**

The officer positions will consist of President, Vice President, Secretary and Treasurer. These officers will also serve as the Executive Board. Details of the duties of each position are provided in the By-Laws. They will serve offset terms of office to maintain leadership continuity.

## **BY-LAWS**

### **ARTICLE I - Elected Officers and Responsibilities**

#### **Section 1 - Elections**

Election of the President, Vice-President, Secretary and Treasurer of the ***Insert chapter name*** Chapter shall be made from a slate of officer nominees, nominated according to the provisions of Article IV, below. Election to fill each officer position shall be at the first general membership meeting after November 1st by simple majority vote of the members voting. The President and Secretary shall be elected in each odd numbered year, and the Vice-President and Treasurer shall be elected in each even numbered year. This will insure continuity of leadership. Implementation of these terms will be determined by the initial Executive Board. Once elected, officers will serve a two year term beginning on 1 January and ending on 31 December. Duties of the officers will be as prescribed by the President (and the By-laws). Any ***Insert chapter name*** Chapter member in good standing may hold any elected office. In the event the office of the President becomes vacant, the Vice-President shall serve the remainder of the elected term. If any other office becomes vacant, the President shall appoint an individual to fill the remaining term. ***Insert chapter name*** Chapter officers serve strictly in a voluntary capacity and shall not be compensated for their time. However, they may be reimbursed for official expenditures related to their chapter duties, such as postage, awards, telephone calls and other appropriate expenses.

#### **Section 2 - Responsibilities**

A. **President:** The President, subject to the Executive Board, shall be in charge of the affairs of the chapter in the ordinary course of business. In addition, the President shall: preside over chapter board and general membership meetings, appoint committee chairpersons, represent the chapter on behalf of the members, lead chapter-planning activities, serve as liaison between the Chapter and the A/TA National governing body, communicate regularly with national Board of Officers, make a report of the Chapter activities at the general membership meeting when elections are conducted, call special membership meetings, supervise elections, appoint and prescribe the function of committees as deemed necessary. In addition, the President shall develop succession plans for elected positions to secure continuity of officers in cases of untimely vacancies due to Permanent Change of Station (PCS), retirement, discharge, etc.

B. **Vice President:** The Vice President shall exercise the powers of the President during that officer's absence or inability to act, act as President on matters directly related to grievances filed against the President, manage the affairs of the Standing Committees, manage the affairs of the Special Committees, be responsible for planning quarterly meetings, preside over the programs committee, oversee recruitment and solicitation of new members, and perform other duties as assigned by the President.

C. **Secretary:** The Secretary shall administer all association administrative matters, under the direct authority of the Executive Board. The Secretary shall maintain written minutes of all meetings and present said minutes from the last meeting for

board approval. The Secretary is responsible to maintain appropriate Chapter records and reports, maintain current membership roster, forward changes to national Secretary, keep the official record of, and amendments to, the Constitution and By-laws, notify officers and committee chairpersons of their election or appointment and furnish committees with documents required. The Secretary shall be responsible for receiving and sending chapter correspondence and reports, attest to the signature of the President, provide semiannual reports to host base services (SVS/SVFP) in accordance with AFI 34-223, and perform other duties as assigned by the President. The Secretary is Chairman of the Nominating Committee. The Secretary also is custodian of pertinent **Insert chapter name** Chapter documents, including the chapter charter and the **Insert chapter name** Chapter master file.

D. **Treasurer:** The Treasurer shall administer all **Insert chapter name** Chapter fiscal matters, under the direct authority of the Executive Board. The Treasurer shall receive, deposit, disburse, maintain a record and account for all funds of the organization, and prepare the publication of all quarterly statements of the financial status of the organization. The Treasurer shall present a financial status report at each general membership meeting and shall answer any questions regarding finances. Specifically, the Treasurer is responsible for maintaining and accounting of all cash disbursements for and from the **Insert chapter name** Chapter, maintenance of bank and investment accounts, keeping all financial records, receipts, invoices, and vouchers, preparing Annual Budget for approval by the Executive Board, Chair the Finance Committee, provide semiannual reports to host base services (SVS/SVF) in accordance with AFI 34-223, and perform other duties as assigned by the President.

## **ARTICLE II - Terms of Office**

The term of office for each position of the Executive board shall be two (2) years. To provide continuity in management of the affairs of the **Insert chapter name** Chapter, nominees for positions on the Executive Board shall be for staggered terms as determined by the initial Executive Board. The date for assuming office will be from 1 Jan to 31 Dec.

### **Section 1 - Eligibility of Officers**

Any current member in good standing with the A/TA National office shall be eligible for office in any position of the **Insert chapter name** Chapter.

### **Section 2 - Vacancies**

In case of any vacancy among the elected positions of the Officers, the President shall appoint a replacement with the approval of the Executive Board members. In the case of a vacancy in the office of President, it shall be filled by the Vice-President for the remainder of the former President's term. A new Vice-President shall be elected at the next membership chapter meeting.

## **ARTICLE III - Eligibility for Membership**

### **Section 1 - Membership in A/TA National**

Membership in the *Insert chapter name* Chapter shall be open to those individuals who are members in good standing with the A/TA national without regard for gender, race, age, sexual orientation, color, creed, or national origin.

### **Section 2 - Open Membership**

Membership is open to military, civilian, active, retired, Air Reserve Component (ARC), other service members, defense contractor and civilian government employees, as well as civilians with no ties to the military.

### **Section 3 – Benefits of Membership**

All benefits of membership arranged or contracted for by the *Insert chapter name* Chapter shall be uniformly made available to each member.

## **ARTICLE IV - Committees**

### **Section 1 - Committee Membership**

The chairpersons of committees shall be appointed by the President, with the concurrence of the Executive Board. Non-office-holding committee members shall be appointed by the chairperson, with approval of the President. All Standing Committee members shall serve for one year following appointment.

### **Section 2 - Standing Committees**

The standing committees of the *Insert chapter name* Chapter are the Program Committee, Publicity Committee, and the Awards Committee. The standing committees are the action agencies responsible to the Vice President for specific functions required to promote the objectives of the *Insert chapter name* Chapter and to serve the general membership. In the absence of the chairperson, another committee member present shall be selected to assume the duties of the chairperson.

### **Section 3 - Special Committees**

Special Committees may be appointed at any time when deemed necessary by the *Insert chapter name* Chapter President, with the concurrence of the Executive Board. In the absence of the chairperson, another committee member present shall assume the duties of the chairperson. The chairpersons of the respective Special Committees shall have the prerogative of selecting their own committee persons, as required, subject to the approval of the *Insert chapter name* Chapter President. Special committees may include, but are not limited to, the Finance Committee, the Nominating Committee, Coin Committee, Scholarship Committee, Golf Tournament Committee, and Charity Committee.

### **Section 4 - Standing/Special Committee Composition and Responsibilities**

A. The functions of each Standing Committee are described as follows:

1. Programs Committee: The Chairperson of the Programs Committee shall confer with the *Insert chapter name* Chapter President prior to scheduling and making

arrangements for meetings or other activities. The Programs Committee is responsible for the planning and coordination of arrangements for all meetings and social events scheduled for the participation of the members, to include detailed arrangements for appropriate and suitable facilities, catering services, meal planning, entertainment or guest speakers, transportation and billeting (when required), and for preparing and disseminating notification of meetings or activities to the membership on a timely basis. The programs committee will plan events, solicit guest speakers, and organize projects undertaken by the chapter. The Programs Committee is also responsible for the collection of the funds incidental to such activities and for accounting and disbursement actions through the Treasurer to the facility rendering service.

2. Publicity Committee: The Publicity Committee is responsible for managing the ***Insert chapter name*** Chapter Web Site, the Facebook Site and assuring activities of the Chapter receive recognition, within propriety, through the submission of written accounts, stories, photographs, etc., to local, national, and other suitable news media. Normally, the chairperson of the Publicity Committee shall confer with the President regarding all news releases and prior to the publication of any articles, posters, flyers, or newsletters.
3. Awards Committee: The Awards Committee is responsible for the ***Insert chapter name*** Chapter Awards Program. The ***Insert chapter name*** Chapter Awards Program consists of the Annual Airmen, NCO, SNCO and CGO Performer Awards.

B. The functions of each Special Committee is described as follows:

1. Finance Committee: The Finance Committee is responsible for assuring proper and accurate administration of the ***Insert chapter name*** Chapter's monetary assets and liabilities through audit of the Chapter financial records as required and at any time deemed necessary by the Executive Board. The Treasurer shall have management responsibilities including, but not limited to, accountability of assets, satisfaction of liabilities, and the disposition of residual assets on dissolution of the Chapter. The Treasurer shall chair the Finance Committee.
2. Scholarship Committee: A Scholarship Committee shall conduct the Chapter's scholarship program, to include advertisement and publicity, the application process, application evaluation, selection, and the awards process.
3. Golf Tournament Committee: A Golf Tournament Committee may plan, schedule, and execute an Annual ***Insert chapter name*** Chapter Golf Tournament. The chairperson shall submit a full report to the ***Insert chapter name*** Chapter no later than 60 days following a golf tournament.
4. Nominating Committee: A Nominating Committee normally has a one-time annual function to select and nominate members of the ***Insert chapter name*** Chapter as candidates for election to the Executive Board positions for the forthcoming calendar year. At least three Chapter members, including the President, shall be on the Committee.
5. Coin Committee: A Coin Committee may be responsible for design, manufacturing, marketing, and sale of ***Insert chapter name*** Chapter coins. The

chairperson will submit a quarterly report to the *Insert chapter name* Chapter, as required.

6. Charity Committee: The Charity Committee shall be the main point of contact for charitable activities and contributions of the *Insert chapter name* Chapter. The chairperson shall track and report all activities, requests, and donations (both monetary and service oriented) to the General Membership upon completion of an event. A report shall be provided to the *Insert chapter name* Chapter Treasurer

## **ARTICLE V - ELECTIONS**

### **Section 1 - Nominations:**

Nominations shall be submitted to the Nominating Committee Chairman prior to the November chapter meeting. Nominations must be in writing, e-mail is acceptable, listing the office and qualifications. Floor nominations will not be made at the election meeting. Candidates for office are allowed three minutes to give their nomination speech before the Chapter membership. Nomination seconds may be made from **any member in good standing with the A/TA National Office.**

### **Section 2 - Nominations Committee Report:**

The Nominations Committee Chairman shall submit at the November Chapter meeting, the Nominating Committee Report. From the report, the Chairman shall create an official ballot that includes every name submitted and provide the Secretary the official ballot for the election. The ballot shall list, starting at the top, the office in the following order: President and Secretary in odd years; Vice President; and Treasurer in even years. The candidates name shall be listed by rank, if military, and alphabetically, if civilian.

### **Section 3 - Election Ballot:**

Elections shall be followed In Accordance With (IAW) the Constitution Article V, section 3. Any candidate for office who is not in good standing shall be disqualified. The ballots will be collected as soon as all balloting is complete. Voting will be by secret written ballot unless there is only one candidate for office.

- A. To be elected, a simple majority of the votes cast by the members is required. If no candidate receives a majority of the votes cast, an immediate run-off will be held between the top two candidates. The vote count shall be announced after each vote for each office.
- B. If an officer resigns, or is unable to serve the remainder of his or her term of office, the President shall appoint a person to fill the vacated position for the remainder of the term of office.
- C. All Chapter financial accounts shall be reconciled each year prior to the annual Chapter elections, upon resignation, Permanent Change of Station (PCS), retirement, discharge, etc. of the Treasurer, or if the Treasurer is unable to fulfill their full term of office.

## ARTICLE VI - ORGANIZATION

Unless otherwise amended, the organizational structure of the *Insert chapter name* Chapter of the Airlift/Tanker Association shall be limited to the following: Officers of the Chapter, Executive Board; Standing Committees, and Special Committees

### Section 1 - Officers of the Chapter:

The Officers of the Chapter are responsible for overall administration, to include general planning and coordination of all programs and activities pursuant to the *Insert chapter name* Chapter statement of goals and objectives, maintenance of records, financial disbursement and accounting, coordination of matters of interest to the association, and implementation of all adopted policies and procedures in accordance with the bylaws.

### Section 2 - Executive Board:

The Executive Board shall serve as the policy-making body of the *Insert chapter name* Chapter and is comprised of the Officers of the Chapter. The Board shall meet at the discretion of the Chapter President, but no less than one meeting of the Board shall be held each calendar quarter. Individual Board Members may request a meeting of the Board at any time there is, in the opinion of the requestor, sufficient cause and/or business requiring Board action.

- A. The Chapter President automatically assumes the position of Chairman of the Executive Board upon installation into office.
- B. The Executive Board shall arbitrate on all business requiring significant changes to policy or standing procedures. Members desiring changes, additions or deletions to policy and procedures shall present their views and recommendations either before the general membership or directly to the chairpersons of the appropriate committees.
- C. A minimum of three members of the Executive Board must be present for a quorum. A simple majority vote of the Executive Board members present is required to constitute official Board action.
- D. The Executive Board may vote on *Insert chapter name* Chapter matters via electronic mail or telephonically. All motions made via electronic mail or telephonically, shall only be presented by the President or any Vice President and must be recorded and that record shall be provided to the chapter secretary. Any Board member may make the motion to table the motion, and if the motion carries by a simple majority, the motion made shall be tabled. This requirement does not apply to *Insert chapter name* Chapter Officer Elections.
- E. The Secretary shall keep minutes of all Executive Board meetings, including copies of all e-mails.

## ARTICLE VII - MANAGEMENT

### Section 1 - General:

The business, property, and funds of the *Insert chapter name* Chapter shall be managed and controlled by the Executive Board. Expenditures of *Insert chapter name* Chapter funds that are under five hundred dollars (\$500.00) shall be approved by a simple majority vote of the Executive Board. Expenditures of the *Insert chapter name* Chapter funds that exceed five hundred dollars (\$500.00) shall be approved by a simple majority vote of the members present and voting at a regularly scheduled General Membership meeting. Disbursement checks will require two (2) signatures, one of the treasurer and one of the finance committee. Approved expenditures shall be disbursed as provided in the Constitution, Article V, Section 5.

### **Section 2 - Liability:**

Each member must be aware that financial liability incurred by the *Insert chapter name* Chapter may ultimately result in individual personal financial responsibility if the organization fails to discharge its financial obligation. This is true even if the *Insert chapter name* Chapter is dissolved.

### **Section 3 - Insurance:**

Insurance coverage has been considered, but is deemed not necessary at this time. However, the need for insurance coverage shall be reevaluated periodically (a minimum of annually, during the annual election) and will be procured should the *Insert chapter name* Chapter sponsor, schedule, or participate in an activity for which insurance is deemed necessary.

## **ARTICLE VIII - MEETINGS**

*Insert chapter name* Chapter Meetings will be managed using the following rules.

**Section 1 - Meetings:** *Insert chapter name* Chapter meetings will be ruled and governed according to the Roberts Rules of Order.

### **Section 2 - General Membership Meetings:**

The Chapter plans to hold monthly general membership meetings, sponsor guest speakers, become involved in community activities, and to participate in the Airlift/Tanker Association's national convention. The quarterly meetings and guest speakers will be directed toward the continuous improvement of the air mobility forces of the United States and its allies. Attendees should include, but are not limited to, the Officers of the Chapter, Executive Board, National Board members, standing and special committee members, and other interested general members.

### **Section 3 - Election of Officers:**

The first meeting after November 1st will be a general membership meeting at which the election of officers will take place.

**Section 4 - Special Meetings:** The President or one of the Vice Presidents acting on behalf of the President may call special meetings.

## **ARTICLE IX - FINANCES AND TAXES**

### **Section 1 - Annual Audit:**

An Annual Audit shall be performed by a certified public accountant (CPA) if annual gross revenues (sales, income, dues, service charges, donations, etc.) exceed \$100,000 and shall be at

the organization's expense. All *Insert chapter name* Chapter financial accounts shall be reconciled each year prior to the annual Chapter elections and upon Permanent Change of Station, retirement, discharge or resignation of the Treasurer, or if Treasurer is unable to fulfill their full term of office.

**Section 2 - Fraud or other improprieties:** Whenever there are indications of fraud or other improprieties, the Air Force Audit Agency may be requested to do an audit at the organization's expense; such an audit is made to protect the interest of the Air Force, the Airlift/Tanker Association and the *Insert chapter name* Chapter. A copy of any audit will be forwarded to the Installation Commander for review and filing. As a rule the *Insert chapter name* Chapter will not seek to accrue monthly balances in excess of \$10,000 over any 3-month period.

## **ARTICLE X - AWARDS & GIFTS**

Awards and gifts will be made at the discretion of the Executive Board.

## **ARTICLE XI - AMENDMENTS TO THE CONSTITUTION AND/OR BY-LAWS**

### **Section 1 - Adoption:**

The Constitution and/or By-laws become effective upon adoption by an affirmative vote of a majority of the membership present.

### **Section 2 - Amendment:**

The Constitution and/or By-laws may be amended, in whole or in part, by an affirmative vote of a simple majority from a quorum of the membership. Notice of intent to amend the Bylaws must be given to each member prior to the vote on amendment.

### **Section 3 - Changes:**

Proposed changes by members to the Constitution and/or By-Laws must be submitted in writing to the Officers of the Chapter and signed by not less than five percent (5%) of the total number of *Insert chapter name* Chapter members ninety (90) days prior to the convening of a general membership meeting. The Constitution and By-laws Committee Chairman, any Standing Committee Chairman or Special Committee Chairman, may submit By-law amendments in writing to the Chapter Officers without membership signatures. The Chapter Officers shall decide when the proposed amendments shall be presented to the Chapter membership for approval.

### **Section 4 - Vote:**

Proposed changes to the Constitution and/or By-laws must be available to members sixty (60) days prior to the general membership meeting. Two-thirds (2/3) of the eligible voting membership must approve any changes to the Constitution and/or By-Laws.

### **Section 5 - Interim Changes**

The Executive Board may make interim changes on an expedient basis at any time by recorded vote. Interim changes remain in effect until first opportunity to present formal changes to the Constitution and/or By-Laws to the general membership as prescribed in this section, not to exceed one year.

**Section 6 - Conforming with Higher Headquarters and/or Airlift/Tanker Association**

The Constitution and/or By-laws will be automatically amended to conform to directives from higher headquarters and/or the Airlift/Tanker Association.

**ARTICLE XII - DISSOLUTION**

Dissolution of the Chapter may be recommended to the National Airlift/Tanker Association by a simple majority vote of the members present and voting at a regularly scheduled meeting, or at a meeting requested by a Board member. Upon dissolution, all outstanding obligations will be liquidated; if there are net assets remaining, said assets will be used for a social function for the existing membership and/or donated to charity.

## **APPENDIX - IV - ASSISTANCE FROM THE TREASURER**

### **How Can A/TA Help Your Chapter?**

#### **Tax-exempt Status**

The Airlift/Tanker Association received tax-exempt status in March 1979 and is currently exempt from income tax under section 501(c)(3) of the Internal Revenue Code. As such, the Association enjoys a position of special privilege with the Internal Revenue Service (IRS). Since we are a 501(c)(3) organization, donors may deduct contributions as provided by Section 170 of the Internal Revenue Code. The donation is fully tax deductible as long as no goods or services have been received for this contribution. Here's the link to the IRS website where you can verify our status as a tax-exempt organization eligible to receive tax deductible charitable contributions:

<http://apps.irs.gov/app/eos/pub78Search.do?ein1=59-1852735&names=The+Airlift+Tanker+Assoc&city=&state=All...&country=US&deductibility=all&dispatchMethod=searchCharities&submitName=Search> .

The site also contains our "EIN" or Employer Identification Number which is also known as a federal Tax Identification Number or "TIN" and is used to identify the nonprofit entity. Contributors sometimes ask for our EIN when making a donation. The important thing to remember is that the Association's tax-exempt status extends to the chapters and you can use this status to your benefit. Let's look at some of the ways the Association and the tax-exempt status might help your chapter.

#### **Fundraising**

Many of our chapters hold fundraisers to raise money for the chapter operations, future events or to help fund scholarships or awards. The local business community usually supports fundraising activities and A/TA's tax exempt status can provide an incentive since the donor may deduct contributions as provided by the Internal Revenue Code. You should state this on your solicitation materials as well as acknowledge contributions with a written acknowledgement. The written acknowledgement should be on chapter letterhead and should acknowledge the donation amount and tell the donor to "please use this letter as receipt for your donation." In the next paragraph, add that "The Airlift/Tanker Association is a tax-exempt, nonprofit organization as described in section 501(c)(3) of the IRS Code. Our tax identification number is 59-1852735. No goods or services of any value were or will be transferred to you in connection with this donation." If you have any questions, contact the Treasurer at [treasurer@atalink.org](mailto:treasurer@atalink.org) .

#### **Sponsoring an Event**

Have you ever thought about your chapter sponsoring an event which would benefit the entire base or community? The Tony Janus Chapter at MacDill AFB FL sponsors an annual Air Force Ball to celebrate the Air Force Birthday each year. The event is held at the Tampa Convention Center and the participants from the base and the nearby communities enjoy a catered dinner. The chapter solicits sponsorship donations from the community to help defray the cost of the event. Tickets are sold to the base population as

well as the local community to cover the remaining costs. Sounds easy, doesn't it? Aside from putting together a great team to plan and execute the event, the chapter was faced with significant deposits to hold the convention center, caterer and DJ for the evening of the AF Ball. This is where A/TA was able to join forces with the chapter and provide the deposits until sponsorship donations and ticket sales revenue came in. A/TA sent the deposits directly to the convention center, caterer and DJ with the understanding that the Chapter would reimburse the national Association before the end of the calendar year and that the chapter would pay the remaining amounts due at the conclusion of the event. All funds left over are put toward next year's event. The Tony Janus sponsored AF Ball is self-sufficient today after only a couple years of subsidies. Sound like something your chapter would like to do? Contact the Treasurer at [treasurer@atalink.org](mailto:treasurer@atalink.org) to find out more.

I hope this provides some useful information to help you with fundraising and sponsorship activities. If you have any suggestions to make this more informative, please pass them along at [treasurer@atalink.org](mailto:treasurer@atalink.org).

**APPENDIX - V - VIP GUEST ESCORT CHECKLIST**

Escorts can contribute a great deal to a very successful visit. When notifying escorts of their detail, it is important to provide the following checklist so the escort can begin obtaining the information necessary for their duties. (Current as of: 15 July 2017)

**ESCORT OIC/NCOIC:** \_\_\_\_\_

**UPON NOTIFICATION OF ESCORT DUTIES:**

- Identify escorts by name \_\_\_\_\_
- Obtain flight information \_\_\_\_\_
- Arrival (Date/time) \_\_\_\_\_
- Departure (Date/time) \_\_\_\_\_
- Ensure bags are handled \_\_\_\_\_
- Escort through registration process \_\_\_\_\_
- Escort through lodging process \_\_\_\_\_
- Check transportation arrangements \_\_\_\_\_
- Rental Car (as needed) \_\_\_\_\_
- From airport \_\_\_\_\_
- During convention \_\_\_\_\_
- Itinerary \_\_\_\_\_
- Contact Protocol A/TA Board OPR \_\_\_\_\_
- Escort card (typed) \_\_\_\_\_
- \_\_\_\_\_

**DAY PRIOR/DAY OF ARRIVAL AND DEPARTURE:**

**Personal Contact**

- Pre-register guest (obtain room key, necessary maps, vehicle key as required)? \_\_\_\_\_
- Place welcome notes and briefing binders in room (if applicable) \_\_\_\_\_
- Ensure pickup of guest (Meet at airport) \_\_\_\_\_
- Assist with baggage as needed \_\_\_\_\_
- Provide escort card (typed) \_\_\_\_\_
- Obtain Departure information \_\_\_\_\_
- Flight information \_\_\_\_\_
- Ensure transport to airport \_\_\_\_\_
- Ensure bags are handled \_\_\_\_\_
- Ensure return of room key, Lodging payment \_\_\_\_\_

**NOTE:** During the timeframe tasked for escort duties, do not plan any activities that will take you away from your duty for any extended period of time. Be immediately available at least one hour prior to scheduled departure or end event. Many escorts make last minute arrangements to leave immediately following an event. Contact A/TA Board if you have questions, changes, or problems.

**VISIT ITINERARY  
FOR  
VIP Guests  
Arriving date – Departing**

**- Day/Date -**

**1. 11:40 - Airline/Flight info**

Transport from/to:

**2. 1200L – POV, to \_\_\_\_\_**

**- Date -**

**3. 1800-1845L, Pre-Banquet Reception, (Location)**

**4. 1845-1900L, Move to**

**5. Banquet (Uniform of the Day/business suit),**

**- Date 2009 -**

**6. 0630-1030L, Brunch, Location**

**7. ???L Depart \_\_\_\_\_ ( ???L) Flight \_\_\_\_\_**

Transportation will be provided

**8. 1030L, POV from**

**OPR: A/TA Board Rep, Name \_\_\_\_\_, cell number:**

**Escort POC: Name, Room \_\_\_\_\_, cell number**

**Command Post Information \_\_\_\_\_**

## **APPENDIX - VI - CHAPTER MEETING OR EVENT SAMPLE AGENDA**

Welcome and Opening Remarks

Posting of Colors (optional)

Pledge of Allegiance/National Anthem (optional)

Invocation (optional)

Introduction of Guests

- Head Table, VIPs, etc.
- Member Guests

Announcements and Reports

- Treasurer Report
- Membership Report
- Programs Report
- Open announcements

Main Program (as required)

- Meal
- Guest Speaker
- Presentations/Briefings
- Entertainment

Closing Remarks and Questions

- Thank project officers, club/restaurant staff, guest speakers, entertainers
- Present gifts/mementos to guest speakers

Retiring of the Colors (optional)

## APPENDIX -VII – A/TA EMAIL ADDRESSES

Chairman	chairman@atalink.org
President	president@atalink.org
Sr Vice President	srvp@atalink.org
VP, Programs	programsVP@atalink.org
VP, Industry	industryVP@atalink.org
Secretary	secretary@atalink.org
Treasurer	treasurer@atalink.org
Awards	awards@atalink.org
Banquet Team	banquet@atalink.org
Convention Crud	crudmaster@atalink.org
Golf	golf@atalink.org
Registration	ata@atalink.org
Symposiums	seminars@atalink.org
Transportation	transportation@atalink.org
Administrator	ata@atalink.org
ATQ	atq@atalink.org
Public Affairs	publicaffairs@atalink.org
Business Manager	advertising@atalink.org
Heritage	heritage@atalink.org
Legal Advisor	legaladvisor@atalink.org
Historian	historian@atalink.org