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National Active and Retired Federal Employees Association (NARFE)

To: NARFE National Executive Board
From: Bridget Boel, SVP Marketing and Member Resources
CC: Barb Sido, Executive Director
Date: February 16, 2018
Re: Marketing and Member Resources Department Update

This memorandum serves as an update for the National Executive Board regarding the NARFE Marketing and Member Resources Department's major initiatives from the 2018 Operating Plan.

FEDcon18

Registration for NARFE's premier training conference opened with a soft launch on February 1st.

Twenty-four breakout sessions are available to attendees in the topic areas of advocacy, federal benefits, NARFE leadership and lifestyle. Special workshops will include recruitment best practices, magazine focus groups, NARFE Next value concept assessment, public and community relations, NARFE PAC training and state advocacy. Early morning wellness exercise, best practices round tables for NARFE presidents, a new member reception, Florida Night and the gala are among the optional activities. And five high-profile Keynote speakers will highlight general sessions at the start and end of each day.

In addition to the exhibitors, FEDcon will feature NARFETown, where subject matter experts will be available to engage with attendees at five kiosks – Advocacy, the Federal Benefits Institute, Communications, Marketing & Member Resources and NARFE Next. With no hitches having been discovered in the soft launch, targeted marketing has begun via email, online and in-house advertising. We are currently on target to meet our exhibitor and sponsorship revenue budget. An update on registration will be available at the March NEB meeting.

Branding

An RFP was written and sent to six agencies specializing in association branding in mid-January. TGD Creative Strategies & Solutions, located in Alexandria, VA, was selected.

Work will progress in five stages: Brand Assessment, Communication Audit, Brand Messaging and Design, Brand Application and finally, Brand Documentation. A kick off meeting and timeline development will take place the week of February 26th. NEB members can anticipate a questionnaire during the assessment period and review of finalist among design and messaging options.

The project will be completed in time for launch at FEDcon18, including a video presentation at NARFETown.

Public Relations

The new position, Deputy Director of Public Relations, has been filled. Jill Talley joined the NARFE staff on January 30th. The M&R contract has been allowed to expire with work history and media contacts transferred in-house.

With this new position, public relations has moved from the Advocacy Department to Marketing and Member Resources. Our goal is to broaden our public relations focus to include all areas of NARFE value. I.e., Advocacy, the Federal Benefits Institute, events, and new products programs and services. Additionally, this position is now responsible for NARFE's social media strategy, community relations, change communication and NARFE Centennial planning.

While Jill comes quickly up-to-speed, most key performance indicators in the 2018 Operating Plan are slated for 2nd quarter.

Registered Financial Advisor

Much work has been done on the development of a *Find an Advisor* program with Morgan Stanley. As envisioned, this program will provide members with an easy access, online portal where they may find certified financial planners with training in federal benefits and discounted services. In return, Morgan Stanley will provide NARFE a referral fee.

As of this writing, we continue our legal and resource requirements due diligence. An early identified potential legal hurdle, whether or not NARFE would become a fiduciary under this program, has been cleared by our attorney. A go/no go decision will be made this first quarter with plans to launch, if advisable, at FEDcon18.

Federal Benefits Institute

With a new deputy director now in place for four months, the value the Institute offers continues to grow. Weekly meetings are providing ongoing professional development to our specialist staff. Webinars, while still including guest presenters Tammy Flanagan and

Mark Keen, now also feature our own subject matter expert. Far more promotion of the Institute as a member benefit is now warranted and members have responded. Gone are the days of long down times between open seasons. Work is underway to create easier access to the information our members need on the website and guidance on additional subject matter will soon be available there.

The Institute plays a key role as we broadcast NARFE as the go-to-resource for the federal community. Eight FEDcon18 sessions, a keynote address by Tammy Flanagan and a dedicated kiosk in NARFETown will highlight the Institute at the conference. Included in the Operating Plan later this year is an assessment of train-the-trainer opportunities for federal HR professionals as well as retirement and financial advisors. Inclusion on the GSA schedule and direct agency training is also under consideration

As demand for access to NARFE's federal benefits experts grows, we are carefully monitoring response time and building greater efficiency. Additional resources will likely be needed in the future.

Membership

2017 year-end total membership of 208,825 represents both a month-by-month and an annual year-over-year slowing of the membership decline. New member acquisition rose to 13,060, a 28% increase over 2016.

Advocacy accomplishments, Institute growth, cumulative brand exposure via marketing, etc. has contributed to overall membership improvements.

Two sets of results, bellwethers for NARFE relevance among active and recently retired federal employees, are of particular interest:

Webinar vs All Member First Year Renewals

New members recruited via webinars are almost exclusively active federal employees. Webinars were designed not only to attract this group, but also to create a built-in retention tool. Once a member, the benefit is ongoing and free.

The first-year renewal rate for webinar joins is 59%. Our overall first year renewal rate is 56%.

The Institute appears not only to be attracting federal employees. Once members, they are finding value in ongoing membership.

OPM Mailing Response Rates

After a decade of response rate decline among recently retired federal workers, the last four years have seen increases – demonstrating a growing appeal among this target audience.