

I believe that local chapters or local groups of NARFE members are essential for NARFE to be successful in accomplishing its mission. In our Chapter in San Francisco we focus primarily on two important goals: 1. Having an active legislative program, with frequent visits and messaging to our congressperson's office and the two senators' offices in San Francisco. 2. Having an active and flexible recruitment and retention program, with a focus on active Federal workers who will continue the mission of NARFE for many years to come. Today we will talk about Recruitment and Retention and hopefully inspire you to revitalize, improve, or simply consider possible new approaches for your local membership program. I gave a presentation at our last convention on this topic, but today's presentation, while similar, has been revised, because I continue to think about what works and what might be helpful. We cannot be stagnant in our thinking about our membership programs. I believe that change and adaptation are essential to a successful Membership program. So let's be open to new ideas and let's share some ideas a little later.



These are the items I believe make our team in San Francisco successful. I look at our team and I see these items contributing to the success of the Chapter's program. I would add that success breeds more success (If you can, plan some successes.) Our program has grown and grown. New ideas are added and more and more members get involved in our program.



Successful Recruitment and Retention happen when you have a team, not one person, committed to it. Don't dump on your recruitment and retention chairperson. ("Oh, that is something you should do. Why don't you try that? Tell our membership chair about that. What do you have planned for our membership program this year?")



Rather, try creating a team. (“Let’s talk about Recruitment and Retention? How can the Chapter be more effective to increase and retain members? Once you get the ideas out from all your members, remember their ideas and find ways to have them work on their idea with the officers and the membership chair. Rather, If you simply give the job to one person, I fear that you will not have the program you need and that person (membership chair) will likely tire of being the chairperson. When everyone in the chapter sees membership as their responsibility, success is more likely. I am not saying that a chapter can’t or shouldn’t have a membership chair, but I am saying don’t expect one person to do the chapter work on membership.



To be a successful recruiter you must display enthusiasm, passion, and belief in NARFE and its mission. I watch the members of our team present to groups and interact one on one. They all approach recruitment differently. Some talk about possible loss of benefits if Feds don't speak up. Others talk about the webinars that NARFE produces for members and their access to a team of federal benefits specialists. Some express their love for the magazine. Others talk about the history of NARFE. Some begin their recruitment message with a simple, "Thank you for your service," and talk about the importance of Public Service and the respect that Civil Servants deserve. It doesn't matter what avenue they use, as long as they talk with passion and a strong belief that NARFE does good things and what it does is valuable for Active and Retired Federal Workers. It has to be more than "you need to join NARFE." People sense the commitment and belief of those they come into contact with, especially when there is enthusiasm and commitment displayed.

THERE ARE MANY WAYS, NOT ONE WAY



I remember attending the national NARFE Convention and a long time NARFE Member was being honored for recruiting 100 members during that time. She spoke for a moment and folks wanted to know how she did it. She told the audience that she wore her NARFE pin everywhere. People would ask her about the pin and frequently she would find that person or one of their friends or family members who were active or retired federal workers. She always carried applications too. In my Chapter there is a woman who is an active Federal Employee who gives memberships to her fellow workers as gifts. Our Chapter attends at least 5 Health Fairs in the area each fall, 2-3 FEB retirement seminars, and 4 Health Provider seminars held in conjunction with Social Security and Medicare. There are Chapters in the Federation who create their own health fairs or other events that appeal to active and retired Federal Workers. Members of the San Francisco Chapter sit in the foyer of one of the federal buildings for three days for recruitment and retention (they see us and say they need to join and/or renew). We pass out flyers for the next meeting (which we schedule for the last day of the outreach) and have a program on a pre-retirement topic that will be presented by an expert. Chapter 65 frequently has federal workers as speakers at the meetings. Interestingly they often attract other federal workers to the meeting (everyone is always welcome to come to our meetings) and we frequently give a membership to speakers (who may not be NARFE members). They then become our emissary to their fellow workers. Folks, this is all about networking and making connections. These networks

MISSION STATEMENT

To support legislation and regulations beneficial to federal civilian employees and annuitants.

To promote the general welfare of federal civilian employees and annuitants and potential annuitants.

To cooperate with other organizations and associations in furtherance of these general objectives.

The passion and enthusiasm comes from knowing and understanding the mission of NARFE. This is the basis for all that NARFE does and ultimately the basis for your recruitment and retention program. Note the third point in the mission statement. I have had folks from unions come up to me and question me and suggest that there is some competition or conflict between NARFE and other employee advocates. Be familiar with the NARFE coalition partners. Our Chapter started inviting Union officials to our meetings to ensure that we see each other as partners.

VISION STATEMENT

To ensure that:

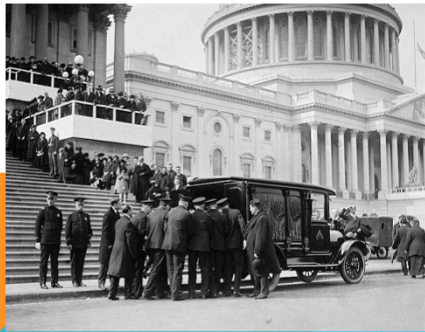
NARFE is recognized as the association devoted to serving and protecting the earned entitlements, rights and benefits.

Great work is done to help preserve those rights and benefits.

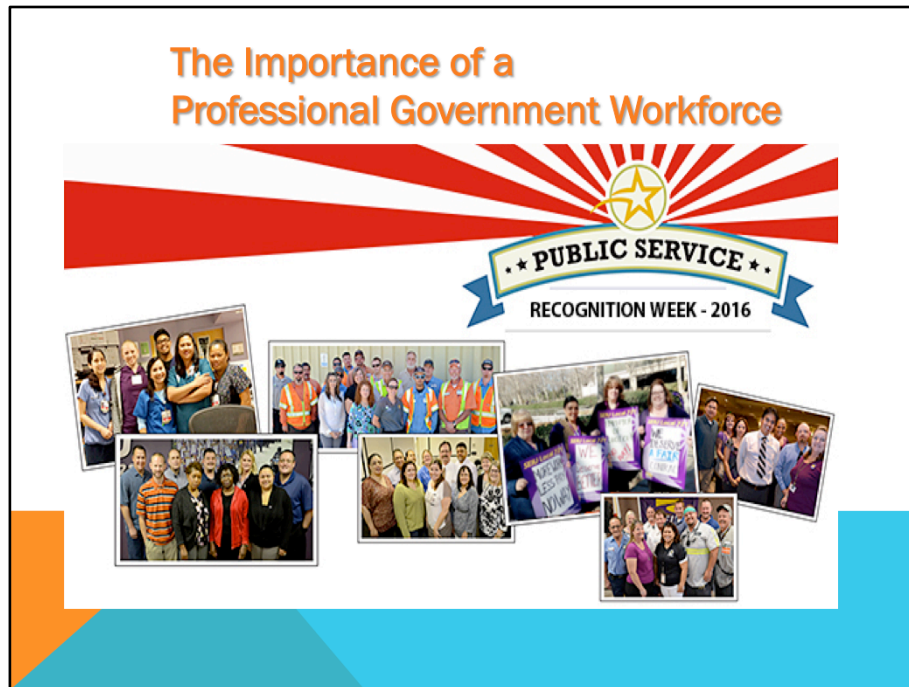
All members know that their needs and wants are being taken to the highest levels of government.

I frequently talk to prospective members about NARFE's testimony to congress and working with congress, especially in the early years of NARFE. I mention that NARFE is a highly respected organization, known for its great work to preserve and protect the rights and benefits of Federal workers and retirees since 1921. I especially liked NARFE's Protect America's Heartbeat Campaign and tell prospective members about NARFE's attempts to generate respect and understanding about the work that Civil Servants perform every day.

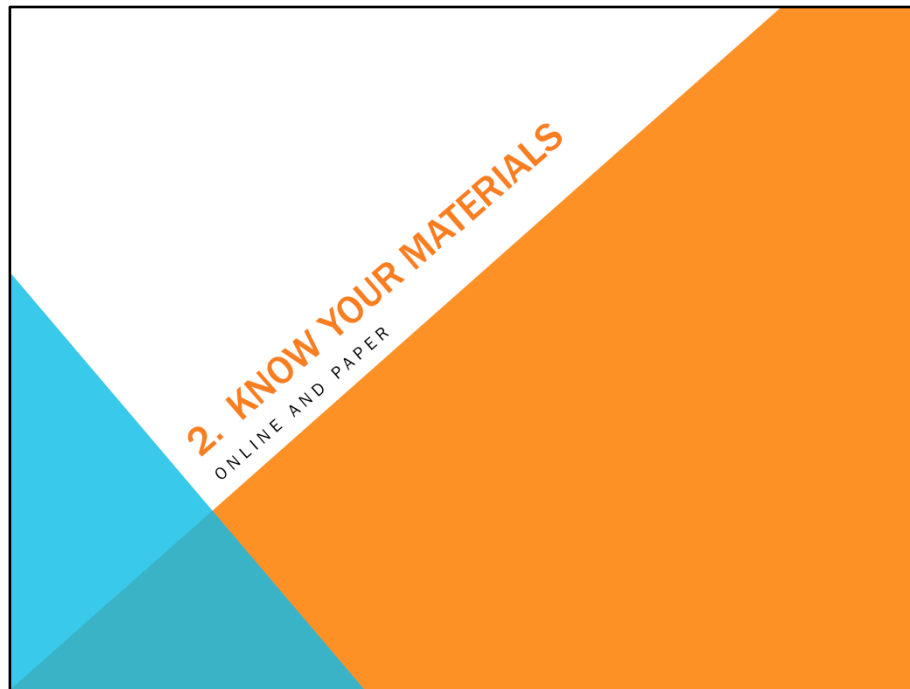
Know Your History: Realizing that NARFE began in 1921 because Feds had no written contact with their employer and at the time insignificant benefits.



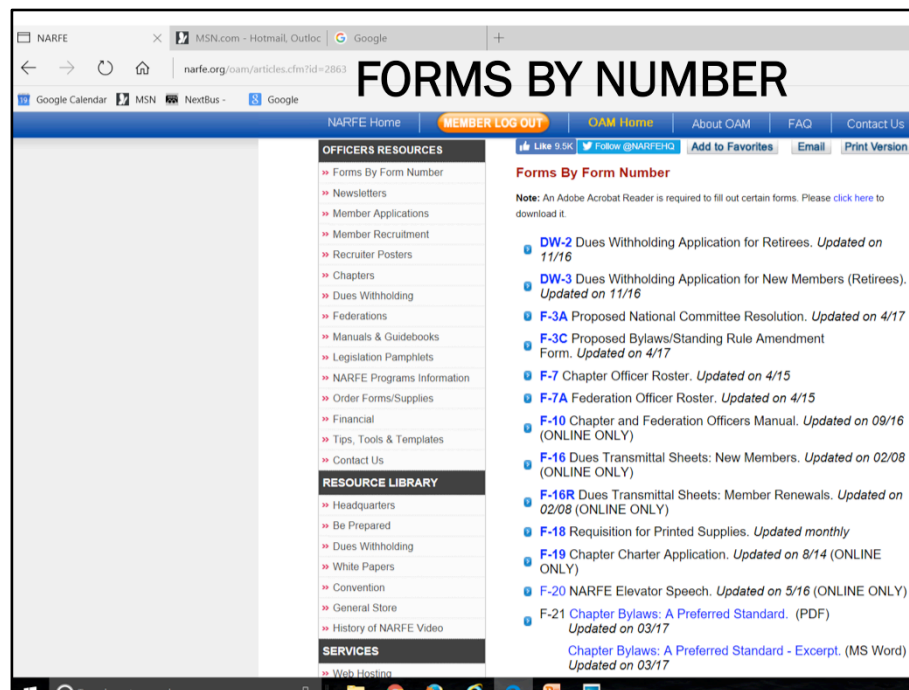
We have a proud history which we should know and appreciate and pass on to others. Enter History on the search box on the National website. You will find: the 90 year anniversary book, the 80 year anniversary book, and a 75 year anniversary video if you don't already have a copy of them. I am told there are plans for a 100 year anniversary book and or video as the next decade begins. These booklets and the video give you a nice perspective on the history of NARFE. Prospective members are impressed when they understand how long NARFE has been around and all that it has accomplished. Remember that the brochure that comes with the application contains "Here's What NARFE Has Done for You" on the next to the last page. (Read it and know it so you can answer the question, "How does NARFE help me? Why should I join?") **Be sure that all participants are given an application, showing them what the brochure says.**



This is really one of my pet peeves that motivates me and makes me passionate. This is about the importance of developing an excellent workforce that cannot be bribed or cannot be bought, that is not corrupt, that functions well and with professionalism that makes the country proud of those who serve them. Public Service is exactly that. I chose it very deliberately. I did not want to spend my life making money for stockholders. I wanted to make sure that the laws and protections that congress passed be followed and not be compromised. I saw phenomenal work being performed by very dedicated employees. I burn with resentment when Americans do not appreciate what their federal workers do for them day in and day out. Protecting, servicing, and assisting in so many ways. I am and we all should be very proud of our federal service and the contributions made daily to make America great.....it is not a slogan but rather a commitment and contribution to our country. This service gives me the passion and enthusiasm necessary to recruit new members. I am tired of people and some media that belittle federal employees, suggesting they do nothing and are overpaid and over-benefitted. I and you contributed to making America a better place to live, not to see how much money we could accumulate, how many possessions we could have. Yes, I wanted to take care of my family, including the entire family of those living in the US. I will never apologize for my earnings or my benefits because I know how I have contributed and provided public services that real people need.



There are so many materials available for you to use and read for your recruitment and retention efforts. Sometimes it is a bit overwhelming. First, learn what is there. Then try them out. You may find some useful and not others. But there is not a paucity of materials and you can either order them or download them.



There are a lot of different form numbers in NARFE. You do not have to memorize the numbers but you do need you understand what is available and realize what it is about and how it can be helpful. I especially like to use the [F-126](#) 10 Worst Mistakes Federal Employees Can Make (every federal employee is somewhat worried that she/he might make a mistake) and the [F-123](#) "Federal Employees Pop Quiz" which is a fun brochure to use and ask a group to answer the question. [M-2](#) Prospect Information Card which are a handy form for holding a drawing and collecting prospective members. [F-135](#) Membership Brochure and Application., Don't Leave Home Without It. I always have numerous applications with me at all times. I have 4 back packs and all four have applications. I keep them in my care as well. They come in handy on plane trips, social events, and family gatherings, etc.



This is an eye catcher for most federal workers. They grab it off the table at health fairs.
Show participants a copy of this pamphlet, bring one for each participant.

Pop Quiz

On Federal Benefits


Which of YOUR Benefits are at Stake?

- a. Retirement Annuities
- b. Employee Pay
- c. Health Benefits
- d. Thrift Savings Plan
- e. Cost-of-living Adjustments

The answer is ALL OF THEM!
More questions and
startling answers inside ...

When you ask this question, you will usually get some trying to guess which one. I have found Federal employees who say that none of their benefits can be changed once you retire. So Sad. **Show participants a copy of this pamphlet, bring one for each participant.**

Information Card M2


National Active and Retired Federal Employees Association

Full Name _____

Street Address _____ Apt. / Unit _____

City _____ State _____ ZIP _____

Email _____

Phone _____

I am a ☐ Current Federal Employee ☐ Retiree

Are you a NARFE member? ☐ Yes ☐ No

FOR NARFE USE ONLY Recruiter # _____

M-2 (09/13)

This Information card is really quite valuable and is should be ordered and used regularly when you do events, especially health fairs and pre-retirement events. It is your way of getting the information that NARFE is unable to get from OPM. And allows you to follow these folks that now know something about NARFE and National assists with follow up letters and keeps them in their database if you send them to them. **Show participants a copy of this card, bring one for each participant.**

SUPPLIES

SUPPLIES

NARFE *Protecting the Future for*
ACTIVE AND RETIRED FEDERAL EMPLOYEES
National Active and Retired Federal Employees Association

NARFE Home | **MEMBER LOG OUT** | OAM Home | About OAM | FAQ | Contact Us

OFFICERS RESOURCES

- » Forms By Form Number
- » Newsletters
- » Member Applications
- » Member Recruitment
- » Recruiter Posters
- » Chapters
- » Dues Withholding
- » Federations
- » Manuals & Guidebooks
- » Legislation Pamphlets
- » NARFE Programs Information
- » Order Forms/Supplies
- » Financial
- » Tips, Tools & Templates
- » Contact Us

RESOURCE LIBRARY

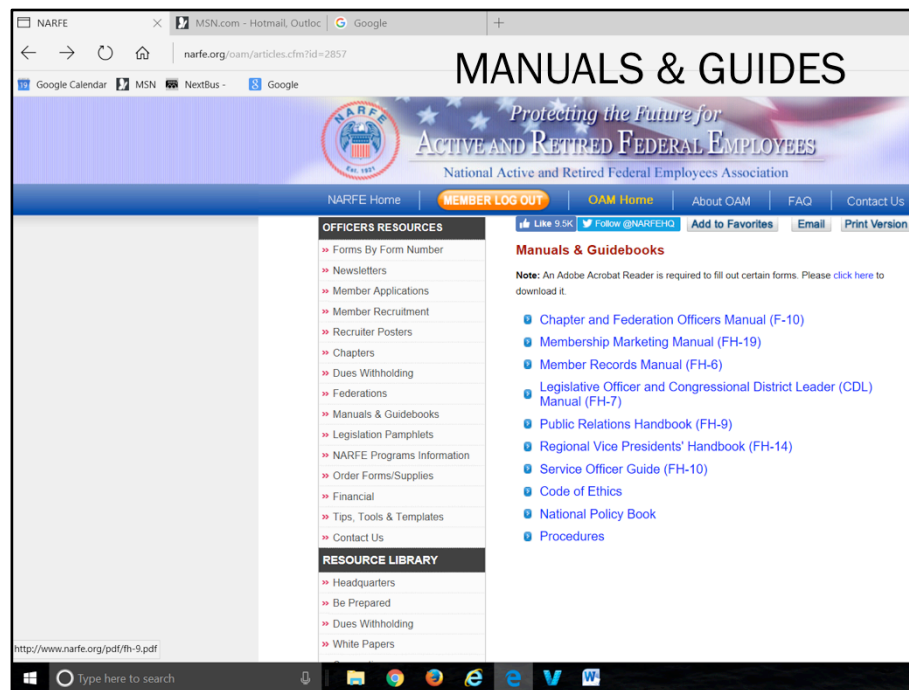
- » Headquarters
- » Be Prepared
- » Dues Withholding
- » White Papers

Supplies

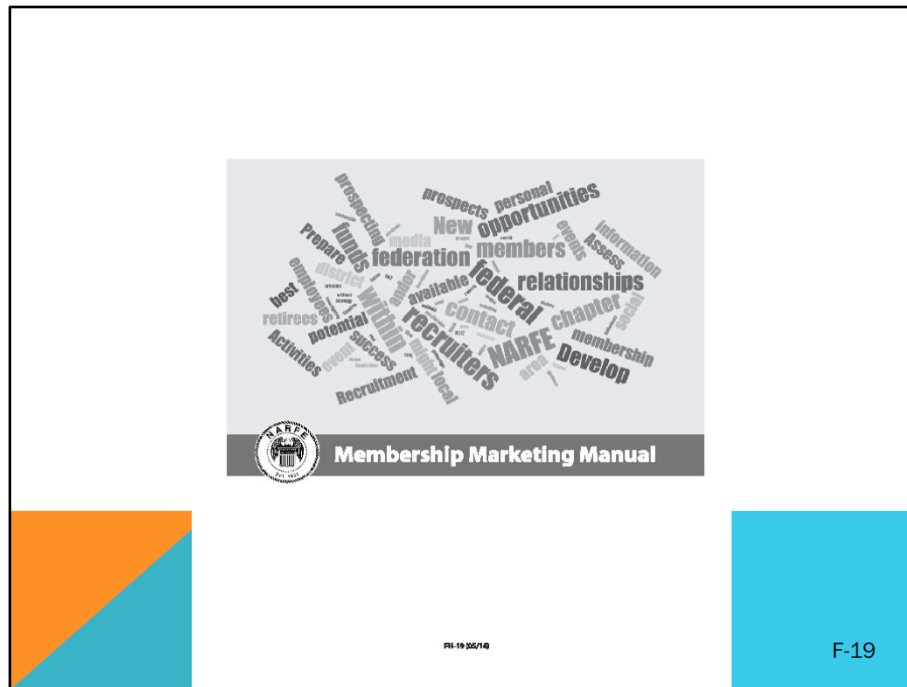
Note: An Adobe Acrobat Reader is required to fill out certain forms. Please [click here](#) to download it.

- » Requisition for Printed Supplies (F-18)
 - [Online Interactive Form](#)
 - [Downloadable in PDF Format](#)
- » Order Form for NARFE Membership Labels/List (F-67)
- » Pin Order Form (F-129)

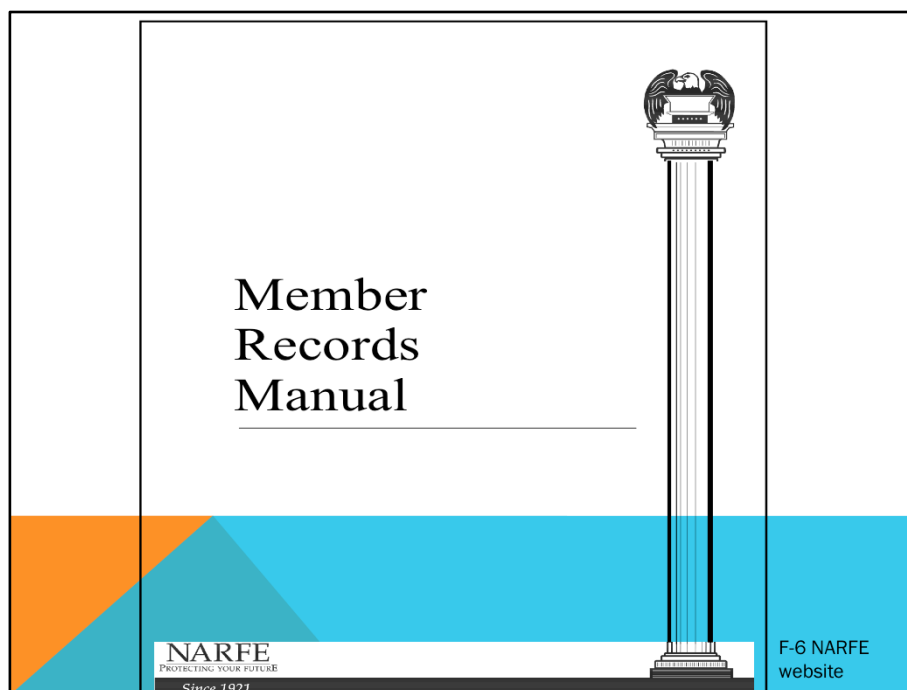
NARFE will always send you the forms you need. Request for them on paper, phone, or online. I only use the online system for my forms.....I never run out and I monitor my supplies. Remember you can also download just about any of these from the website if you need one right away.



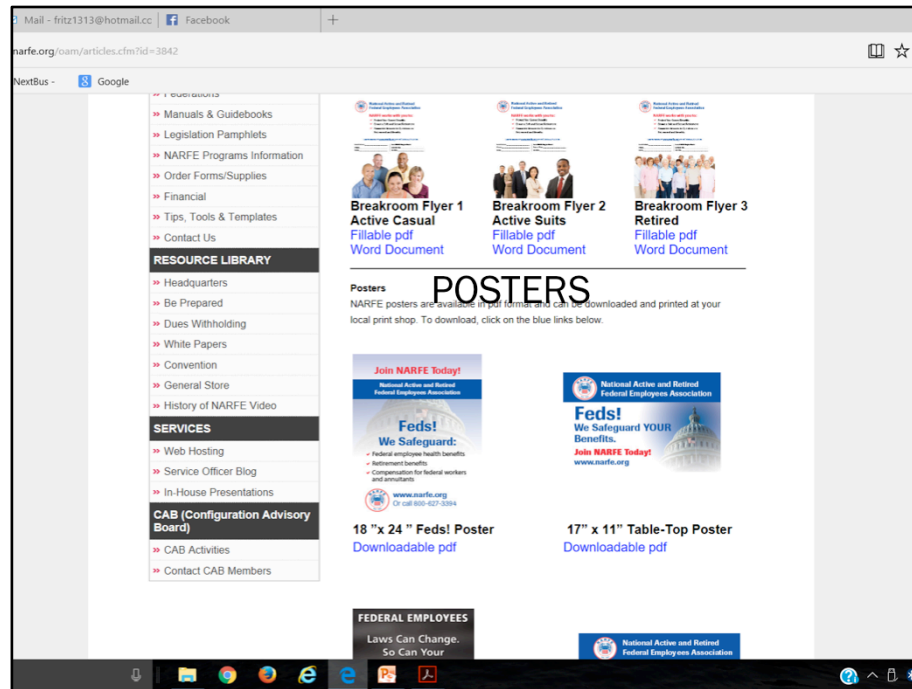
There are two manuals or guidebooks, that I recommend that you read. You can download online or order them. **The FH-19 Membership Marketing Manual and the Member Records Manual FH-6. Show them the next two slides and copies of each and briefly explain what they will find in each.**



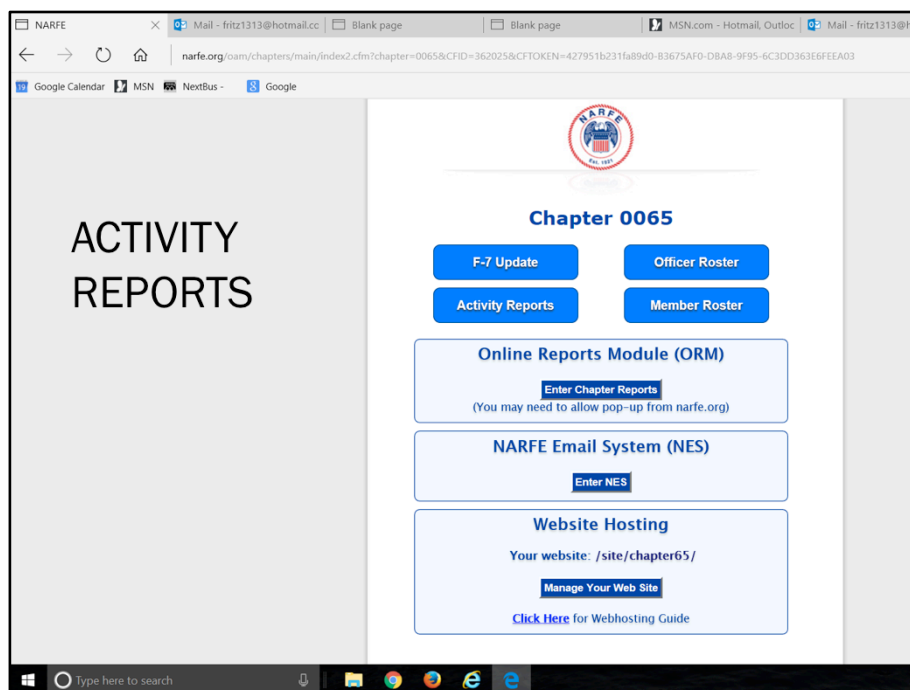
More than 20 pages on everything you ever wanted to know about becoming an excellent recruiter. In a sense it effectively summarizes many of the pieces of information that I am discussing in this presentation.



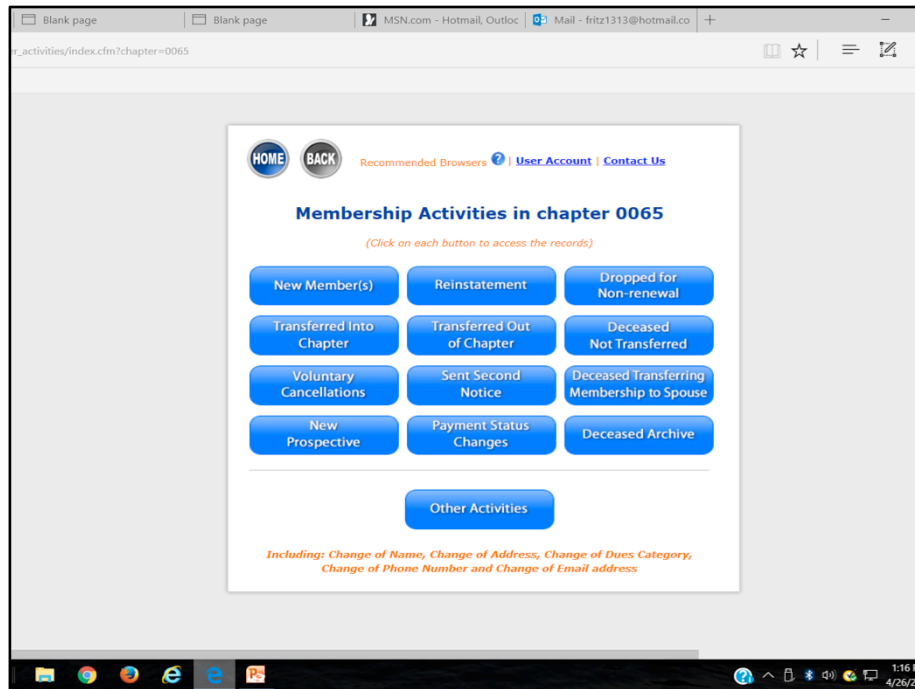
All your questions about the online reports, where to find things, and how to use these valuable resources are laid out in relatively easy to understand explanations.



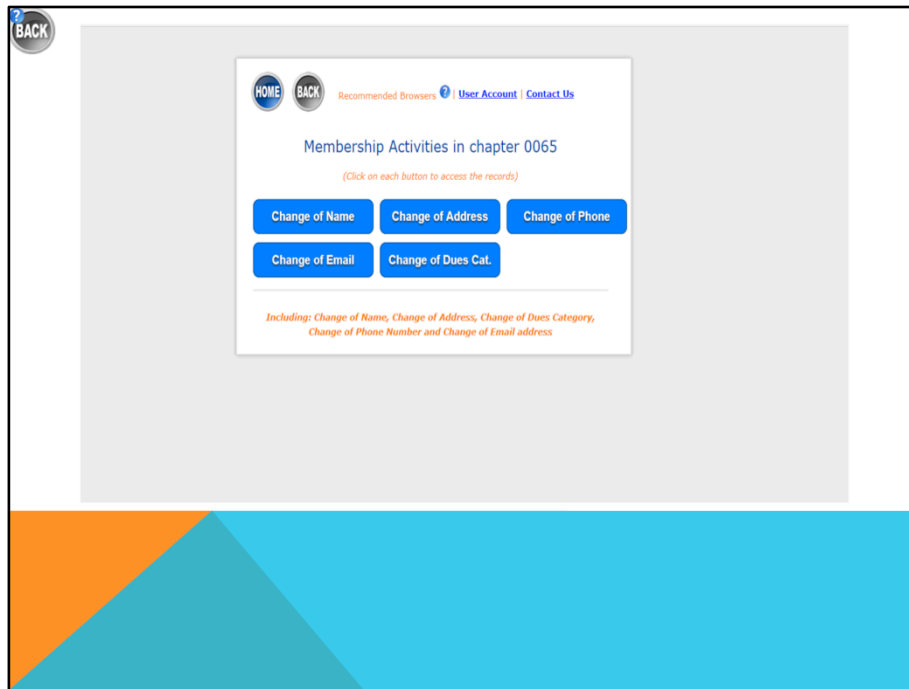
These posters can be mailed to you or you can download from the website.....they include a pull off tab poster where you can fill in the local chapter contact person. There are currently ELEVEN different posters available for use: Some small 8.5 x 11 and some as large as 18 x 24.



This section for your chapter in the OAM is the place where officers and membership chairs can get reports to monitor recruitment and retention efforts. I use it constantly to assess the status and activity that is affecting the Chapter and its members.



Other Activities allows you to make record changes.....when someone calls and tells you they have moved or their email is changed, you can quickly update the record.



Just click on the change you want to make and enter the changes for your member.

NEW MEMBERS

HOME BACK Recommended Browsers User Account Contact Us

New Members in chapter 0065

From: Jan 1 2015 To: Dec 1 2016

Sorted By: ☒ Last Name ☐ ID ☐ Dues Cat ☐ Join Date

Select Columns:

<input checked="" type="checkbox"/> Chapter	<input type="checkbox"/> Dues Cat
<input checked="" type="checkbox"/> ID	<input type="checkbox"/> Member Type
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Chapter Member
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Congressional District
<input type="checkbox"/> Street	<input type="checkbox"/> Activity Date
<input checked="" type="checkbox"/> Suite	<input checked="" type="checkbox"/> Join Date
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Expire Date
<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Auto Renew
<input checked="" type="checkbox"/> Zip	<input type="checkbox"/> Email
	<input type="checkbox"/> Home Phone
	<input type="checkbox"/> Work Phone
	<input type="checkbox"/> Cell Phone

Remember (Date, Sort & Columns) Selection: ☒ Yes ☐ No ENTER

This query may take few minutes to upload, depending on the chapter's size and date range.

Once you click on activities, you can select the activity you are interested in. New members in this case.

NEW MEMBERS FOR A SPECIFIC PERIOD

New Member(s) in chapter 0065 from May 1, 2017 to May 1, 2018																
Row	ID	Last Name	First Name	Address	Suite	City	State	Zip	CD	CM	MT	DC	AR	JD	ED	AD
1000	1	A	A	1		SAN FRANCISCO	CA	94118-3316	12	Y	A	1A			01/01/2018	01/01/2018
1000	1	B	B	2		SAN FRANCISCO	CA	94118-3347	12	Y	C	1A			11/01/2017	12/1/2017
1000	1	C	C	3		SAN LEONARDO	CA	94277-1903	13	Y	C	1A			11/08/2017	11/08/2017
1000	1	D	D	4		SAN FRANCISCO	CA	94110-0121	12	Y	C	1A			07/06/2017	07/06/2017
1000	1	E	E	5		PACIFICA	CA	94044-3137	14	Y	A	1A			10/20/2017	10/20/2017
1000	1	F	F	6		SAN FRANCISCO	CA	94114-1749	12	Y	C	1A			07/05/2017	07/05/2017
1000	1	G	G	7		SAN FRANCISCO	CA	94115-3496	12	Y	C	1A			11/01/2016	10/30/2017
1000	1	H	H	8		WALNUT CREEK	CA	94597-3806	12	Y	C	1A			01/01/2018	01/01/2018
1000	1	I	I	9		ALAMO	CA	94507-5214	11	Y	C	1A			07/01/2017	07/01/2017
1000	1	J	J	10		PALO ALTO	CA	94306-4018	18	Y	C	1A			08/16/2017	08/16/2017
1000	1	K	K	11		HOLLAND	MA	01923-4414	08	Y	A	1A			12/14/2017	12/14/2017
1000	1	L	L	12		SAN FRANCISCO	CA	94112-2185	14	Y	C	1A			11/01/2017	12/1/2016
1000	1	M	M	13		SAN FRANCISCO	CA	94111-2285	12	Y	C	1A			06/20/2017	06/20/2017
1000	1	N	N	14		SAN FRANCISCO	CA	94112-2185	14	Y	C	1A			11/01/2017	12/1/2016
1000	1	O	O	15		ORLANDO	CA	94110-0121	12	Y	C	1A			03/28/2018	04/1/2019
1000	1	P	P	16		CARSON CITY	NV	89709-6024	02	Y	A	1A			09/16/2017	09/16/2017
1000	1	Q	Q	17		VALLEJO	CA	94591-4005	05	Y	C	1A			07/01/2017	07/01/2017
1000	1	R	R	18		SAN LEANDE	CA	94577-3806	13	Y	A	1A			01/01/2018	01/01/2018
1000	1	S	S	19		SAN FRANCISCO	CA	94116-1011	12	Y	C	1A			07/05/2017	07/05/2017
1000	1	T	T	20		DAILY CITY	CA	94014-1367	14	Y	C	1A			10/10/2017	11/1/2016
1000	1	U	U	21		BAKERFIELD	CA	93301-5003	03	Y	C	1A			08/1/2017	08/1/2017
1000	1	V	V	22		VALLEJO	CA	94122-1749	12	Y	C	1A			11/01/2017	11/01/2017
1000	1	W	W	23		VALLEJO	CA	94591-3740	05	Y	A	1A			05/16/2017	05/16/2017
1000	1	X	X	24		VALLEJO	CA	94122-1749	12	Y	C	1A			07/01/2017	07/01/2017
1000	1	Y	Y	25		SAN FRANCISCO	CA	94110-0020	12	Y	C	1A			07/05/2017	08/1/2018
1000	1	Z	Z	26		HONOLULU	HI	96816-1993	01	Y	C	1A			05/16/2017	05/16/2017
1000	1	AA	AA	27		SAN FRANCISCO	CA	94102-5622	12	Y	C	1A			12/1/2016	11/01/2017
1000	1	AB	AB	28		SAN BRUNO	CA	94066-0045	14	Y	A	1A			05/23/2017	05/23/2017
1000	1	AC	AC	29		BRENTWOOD	CA	94513-6225	09	Y	C	1A			11/01/2017	12/1/2016
1000	1	AD	AD	30		NOVATO	CA	94947-4677	02	Y	C	1A			11/01/2017	12/1/2016
1000	1	AE	AE	31		SAN FRANCISCO	CA	94115-3214	12	Y	C	1A			07/01/2017	07/01/2017
1000	1	AF	AF	32		ROCKEE	CA	94572-1940	05	Y	C	1A			11/01/2017	12/1/2016
1000	1	AG	AG	33		SAN FRANCISCO	CA	94116-1943	14	Y	C	1A			07/06/2017	07/06/2017
1000	1	AH	AH	34		CARRY VALLEY	CA	94546-2502	15	Y	C	1A			05/1/2018	04/1/2018
1000	1	AI	AI	35		SAN FRANCISCO	CA	94110-0121	12	Y	C	1A			11/01/2017	12/1/2016
1000	1	AJ	AJ	36		SAN FRANCISCO	CA	94114-2517	12	Y	C	1A			06/23/2017	07/1/2017
1000	1	AK	AK	37		SAN FRANCISCO	CA	94117-1419	12	Y	C	1A			08/28/2017	08/28/2017
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1000	1	AM	AM	39		MOOREHEAD	CA	95555-1472	10	Y	C	1A			11/01/2017	12/1/2016
1000	1	AN	AN	40		CORTE MADRESA	CA	94525-1505	02	Y	A	1A			11/01/2017	12/1/2016
1000	1	AO	AO	41		SAN FRANCISCO	CA	94119-1854	12	Y	A	1A			08/01/2017	08/01/2017

This report allows you to track new members who join your Chapter. Unfortunately it does not show members you recruited for other chapters or simply folks that have no interest in chapters. I notice we recruited two folks outside of CA for our Chapter....I think they were folks visiting the Federal Building in SF during one of our recruitment drives. The Chapter receives money for each new recruit when they are members of the Chapter. Not so for others who do not join the chapter. So the report does not show all the folks our team has recruited. It would be nice if that kind of reporting was available.....there is a once a month report that I always seem to forget about. However, it is only a monthly report of new members and who recruited them. Unfortunately, the info is lost the following month. It is the M-260 individual recruitment report and used by the Federation for paying recruitment fees of \$10 for everyone you recruit.

M-260 with new members recruited for the month

Individual Recruiting Report (M-260)

Individual Recruiting Report (M-260)
This report was prepared on: 05/02/2018

Member ID	Name	Chapter	Join Date
11102485	L	0000	04/01/2018
11102487	P	0000	04/01/2018
11102510	P	0000	04/01/2018
11102501	A	0000	04/01/2018
11102502	E	0000	04/01/2018
11102487	C	0000	04/11/2018
11102488	S	0000	04/11/2018
11102489	S	0000	04/11/2018

Summary | **Details** | **Member Details**

Not sure why this report has no range reporting and it appears it can only be accessed by Federation Board Members. I will ask Martha, the regional Configuration Advisory Board Representative (CAB) to see what she can do to allow fuller access and/or longer ranges for this report.

REINSTATEMENTS

Google Calendar | MNI | NewsBus | Google

46 Member(s) Reinstated in chapter 0065 from Jan/1/2015 to Dec/31/2016

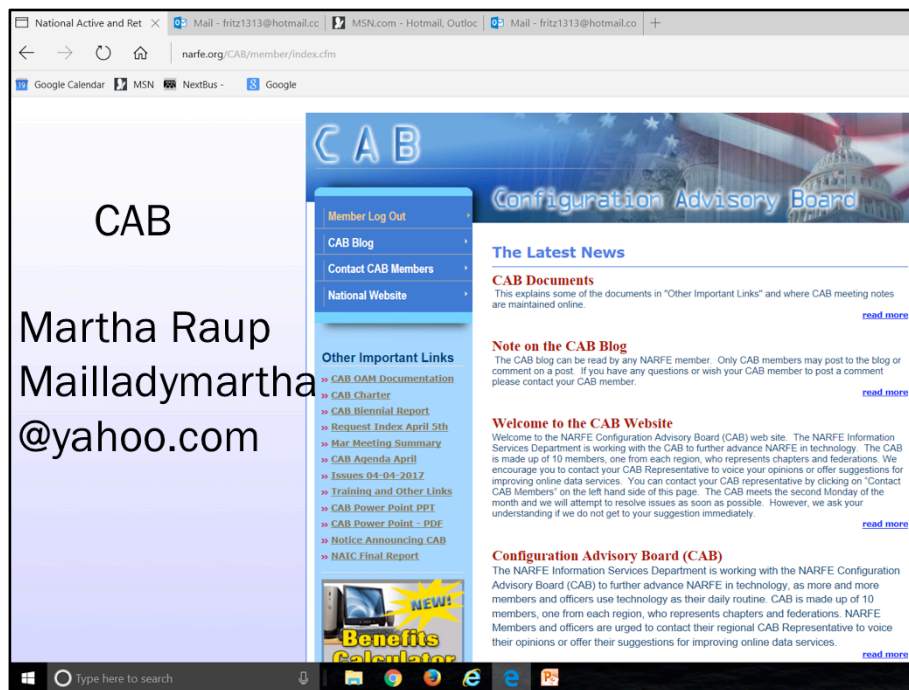
Index	Ch	Last Name	First Name	Address	Birth	City	State	Zip	CD	CM	MT	EC	AD	ED	AD
0005	19	B				SAN FRANCISCO	CA	94111-1625	12	V	A1	No	84062016	10/1/2017	04/11/2016
0005	19	B				SAN FRANCISCO	CA	94111-2623	12	V	A1	No	10/20/2017	02/01/2015	02/01/2015
0005	19	C				BURLINGAME	CA	94010-3716	14	V	A1	No	10/11/2002	02/01/2016	02/01/2016
0005	19	C				SAN FRANCISCO	CA	94108-4864	12	V	A1	No	03/03/2011	12/01/2017	04/07/2016
0005	19	C				SAN FRANCISCO	CA	94114-1485	14	V	A1	No	08/10/2012	10/01/2017	10/01/2017
0005	19	C				PALM BEACH	FL	33402-7864	15	V	A1	No	08/11/2006	03/01/2016	03/01/2016
0005	19	C				SAN FRANCISCO	CA	94127-2287	12	V	A1	No	03/26/2012	01/01/2017	01/01/2017
0005	19	C				SAN FRANCISCO	CA	94127-1547	12	V	A1	No	10/29/2009	04/01/2017	04/01/2017
0005	19	C				SAN FRANCISCO	CA	94124-1869	12	V	A2	No	05/10/1986	01/01/2017	01/01/2017
0005	19	C				SAN FRANCISCO	CA	94123-3808	12	V	A2	No	02/19/1989	04/01/2016	04/01/2016
0005	19	D				SAN FRANCISCO	CA	94105-4903	12	V	A1	No	03/24/1988	03/01/2017	03/01/2017
0005	19	E				SACRAMENTO	CA	95831-1399	12	V	A1	No	05/01/2011	12/01/2017	12/01/2017
0005	19	F				SAN FRANCISCO	CA	94115-2388	12	V	A1	No	05/01/2011	01/01/2016	01/01/2016
0005	19	F				PENNSBORO	CA	94115-2388	12	V	A1	No	05/01/2011	01/01/2016	01/01/2016
0005	19	F				OAKLAND	CA	94607-3208	13	V	A2	No	01/03/2010	10/01/2017	10/01/2017
0005	19	F				SAN FRANCISCO	CA	94103-2722	12	V	A1	No	10/28/2012	04/01/2016	04/01/2016
0005	19	G				SAN FRANCISCO	CA	94115-1596	12	V	A1	No	01/01/2001	09/01/2017	09/01/2017
0005	19	G				SAN FRANCISCO	CA	94109-1924	14	V	A1	No	06/20/1986	04/01/2016	04/01/2016
0005	19	G				SOUTH SAN FRANCISCO	CA	94127-1136	14	V	A1	No	06/20/1986	11/01/2017	11/01/2017
0005	19	G				SAN FRANCISCO	CA	94109-1924	14	V	A1	No	06/20/1986	04/01/2016	04/01/2016
0005	19	H				MARLB	MA	01905-0735	04	V	A1	No	01/20/2015	03/02/2016	03/02/2016
0005	19	H				SAN FRANCISCO	CA	94110-1442	12	V	A1	No	02/01/2008	06/04/2017	06/04/2017
0005	19	L				DALLAS	TX	75210-3860	12	V	A1	No	01/20/1986	01/01/2016	01/01/2016
0005	19	L				SAN FRANCISCO	CA	94110-1442	12	V	A1	No	02/01/2008	06/04/2017	06/04/2017
0005	19	M				SAN FRANCISCO	CA	94115-2736	12	V	A1	No	11/03/2004	09/01/2016	09/01/2016
0005	19	M				SAN FRANCISCO	CA	94123-3808	12	V	A2	No	02/26/2011	01/01/2017	01/01/2017
0005	19	M				SAN FRANCISCO	CA	94103-2207	14	V	A2	No	09/10/2012	04/01/2016	04/01/2016

Field Names
 Ch = Chapter Number
 EC = Congressional District
 MT = Member Type
 AD = Active Federal Employee
 ED = Expiration Date
 AD = Active Date

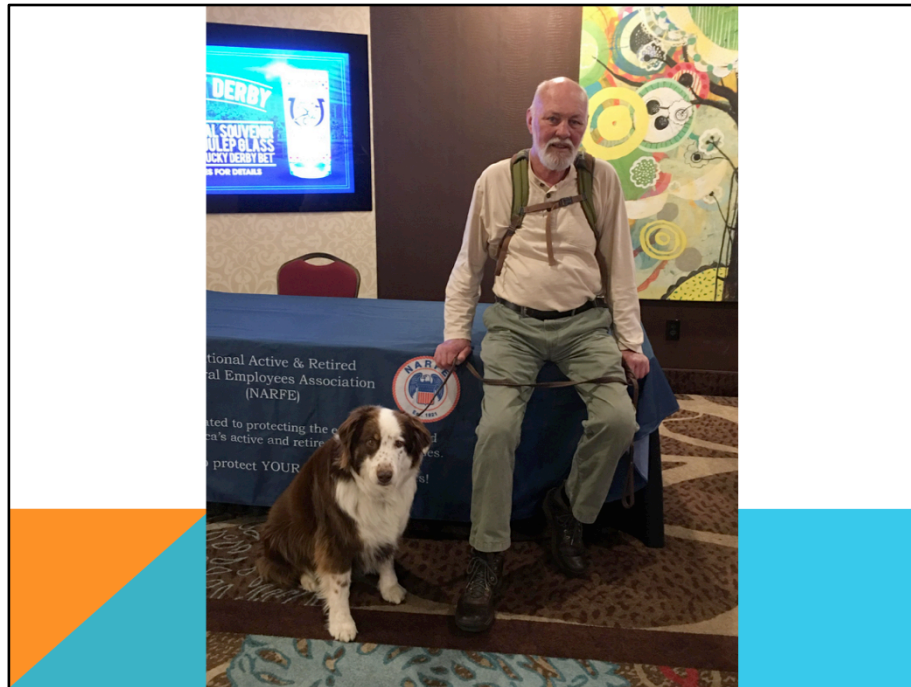
Member Types
 A = Active
 C = Congressional District
 D = District Representative
 E = District Representative
 F = District Representative
 G = District Representative
 H = District Representative
 L = District Representative
 M = District Representative

Dues Categories
 A = Active
 B = Active
 C = Active
 D = Active
 E = Active
 F = Active
 G = Active
 H = Active
 I = Active
 J = Active
 K = Active
 L = Active
 M = Active
 N = Active
 O = Active
 P = Active
 Q = Active
 R = Active
 S = Active
 T = Active
 U = Active
 V = Active
 W = Active
 X = Active
 Y = Active
 Z = Active

Reinstatements is an important report since it shows the results of any retention follow up you are doing.....the National office, of course, does a lot of follow up with these folks too.



If you are getting lost when you go into the OAM, the Cab team has some videos and helps to ensure you can be successful in using the website database. Martha is the regional CAB coordinator. The quickest way I find to get to the CAB site is to click on Membership Materials, and at the bottom on the left side of the page you will see the link to the CAB site. On the home page select the CAB OAM Documentation link for document help and videos. You can even click on a link there that will take you to the CAB YouTube channel that shows the available videos.



Our Membership Chair is Mike Crahan. His passion and enthusiasm for recruiting includes bringing along his dog Shamus to recruitment efforts. Shamus helps create conversations and opportunities to talk about the importance of NARFE to potential members. Who can resist? I DON'T HAVE A DOG SO I JUST BRING CANDY. It is always good to have something to encourage folks to stop by your table. **How do you get potential members to stop by your table at an event? If no one answers, call on someone.**



I cannot underestimate the importance of this section. When we are recruiting, I believe we are selling something, trying to get someone to purchase something that is valuable. If we do not understand the product well, it will be hard to sell it. Ever gone to the store and asked the clerk about an expensive appliance and shake your head when you realize you know more about the product than the salesperson?

What Are Some Benefits of Membership?

- ❖ POWERFUL REPRESENTATION AND ADVOCACY
- ❖ AWARD-WINNING NARFE MAGAZINE
- ❖ MEMBERS-ONLY SECTION OF THE NARFE WEBSITE
- ❖ ACCESS TO A TEAM OF FEDERAL BENEFITS SERVICE SPECIALISTS

There are many benefits. These are some of the more commonly mentioned ones.


What Are Some Benefits of Membership?

- ❖ LEGISLATIVE E-ALERTS
- ❖ SCHOLARSHIP AND DISASTER-RELIEF GRANTS
- ❖ FEDERAL BENEFITS INSTITUTE
- ❖ MEMBERS-ONLY DISCOUNTS

The more familiar we are with these and other benefits, the more successful you will be as a recruiter.



We indicated early that NARFE'S mission was to protect the earned benefits through our lobbying efforts. Well, if you have not been going to this page and using it, you will be hard pressed to explain the legislative component of NARFE. We have lobbyists, we track voting records, we alert and follow legislation, we testify in front of Congress, we give money to folks that support our agenda. And most importantly you can click on the TAKE ACTION BUTTON AND SEND LETTERS TO YOUR REPRESENTATIVES ON IMPORTANT ISSUES. Additionally you need to look at the NARFE Bill Tracker in each magazine to better understand the issues about which prospective members will likely ask.


NARFE Federal Benefits Institute

Welcome to the NARFE Federal Benefits Institute - your gateway to live and recorded learning events and valuable resources designed to help NARFE members take charge of your federal benefits and guarantee a secure future. **These resources are always FREE to members.**

NARFE WEBINARS PROVIDING ANSWERS FOR THE FEDERAL COMMUNITY

NEW WEBINAR!

Steps to a Speedy Retirement

A NARFE Federal Benefits Institute Webinar

**THURSDAY, JUNE 21
AT 2 P.M. ET**

Presented by Tammy Flanagan,
Federal Benefits Expert

EASY REGISTRATION!

Steps to a Speedy Retirement
June 21 at 2 p.m. ET
Presented Tammy Flanagan

Ready to retire? Tammy Flanagan, federal benefits expert, walks you through the paperwork for a seamless transition from employee to retiree. Register now for this new one-hour webinar. [Register here](#)

VIEW Now! Previously Recorded Webinars -- A NARFE Member Benefit

How Much Money Do YOU Need for a Secure Retirement? (May 24, 2016)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

TSP: Maximizing Your Retirement Savings (April 26, 2016)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Social Security and Feds: What You Need to Know (March 22, 2016)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

What's Your Best Retirement Date? (February 22, 2016)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Map Your Way to a Smooth Retirement (January 25, 2016)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Post-Retirement Pitfalls & How to Avoid Them (December 14, 2017)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Health Plans: Discover Your BEST Option (November 30, 2017)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

FEHB & Medicare: What's Best For You? (October 26, 2017)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Retirement Forms: Step-by-Step for Guaranteed Success (September 21, 2017)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

From Federal Employee to Annuitant -- Master the Process! (August 24, 2017)
60 Minute Webinar | Q&A Transcript | Slides (pdf)

Active Federal Employees have indicated to NARFE that they join NARFE for the Federal Benefits Institute more than any other reason. The page lists all the archived webinars and what the next webinar will be.

Previously Recorded Webinars ON-DEMAND

FREE
with NARFE membership!

NARFE WEBINAR PRESENTERS

Tammy Flanagan
Federal benefits and retirement expert

Mark Keen, CFP
Financial planner helping Feds prepare for retirement

James Marshall
Deputy Director, NARFE Federal Benefits Institute

AVAILABLE NOW!

Pre- and Post-Retirement Planning

- What's Your Best Retirement Date?
- Speeding the Retirement Journey
- Social Security Made Simple


Financial Planning

- Estate Planning for Feds
- TSP: Love It or Leave It
- Exploring TSP Withdrawal Options

Health Benefits

- Alphabet Soup of Health Plans
- FEHB and Medicare

There are already 30 webinars that members receive free with membership. Hundreds of new members have been recruited via this vehicle. It certainly addresses the fact that many agencies are providing little or no assistance along the path to retirement. **Show them a copy of the F-1 (The current Federal Benefits Institute flyer they can download or order and use at events.) How many of you have seen at least one of these webinars?** If you have not yet done so, I recommend you do so. You will be better equipped to talk about this benefit to members and answer their questions.



NARFE WEBINARS
Answers for the Federal Community

Next Webinar!

How Much Money Do YOU Need for a Secure Retirement?
A NARFE Federal Benefits Institute Webinar - FREE for NARFE Members
Thursday, May 24 at 2 p.m. ET

Retirement planning is the most crucial financial task you'll undertake. With so much at stake, you need the best guidance available.

What You Will Learn:

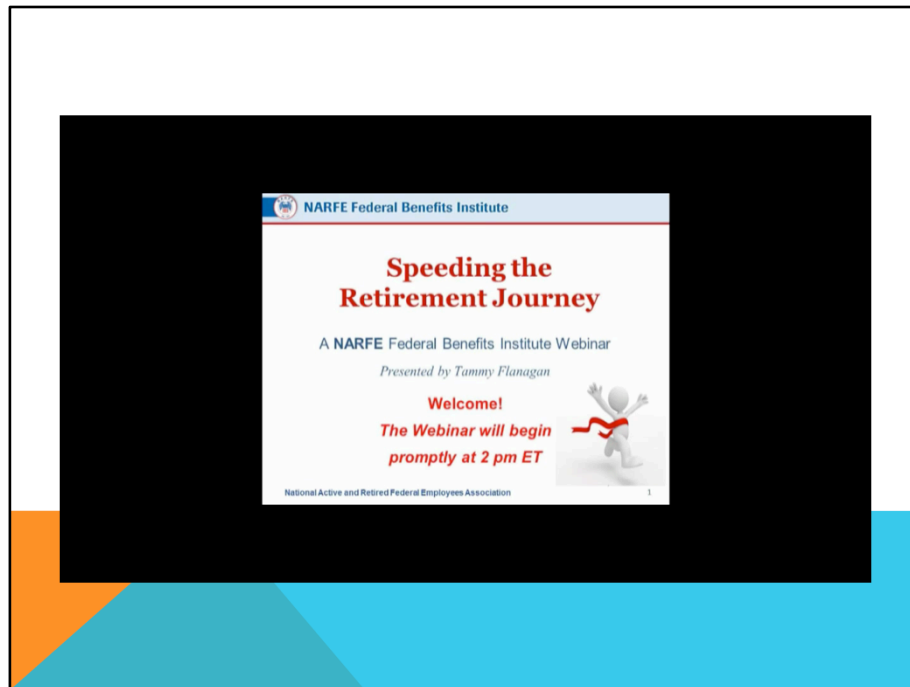
- ✓ Strategies for transforming your investments into a lifetime income
- ✓ Proven methods to calculate your retirement living costs
- ✓ How taxes affect your spendable income
- ✓ What you can do to reduce risk and eliminate concerns
- ✓ And more!

As a Fed, your job is complicated by navigating one of the most complex benefit programs around. Apply a professional's knowledge to your own retirement plan and feel secure in your decisions and your future. Sign up today for this one-hour presentation and Bonus Q&A session on May 24 at 2 p.m. ET.

Your \$39.95 registration includes a 1-year NARFE membership!

Mark Keen, CFP, is a federal financial planning expert and regular columnist in *narfe* magazine. Keen has helped countless federal employees prepare for a secure retirement.

The F-2 is the latest flyer for the next webinar. **Show them the latest F-2.**



The webinars have slides and questions and answers at the end.

Upcoming Webinars (All webinars at 2 p.m. ET)

July 26 - Survivor Benefits: Ensure Your Peace of Mind
Presented by James Marshall - Sponsored by Aetna

September 13 - Retirement Forms: The Devil's in the Details
Presented by James Marshall - Sponsored by Aetna

October 11 - FEHB & Medicare: Understanding Your Choices
Presented by James Marshall - Sponsored by GEHA

Good to know the upcoming Webinars too. You will find these on the Federal Benefits Institute web page on NARFE.org. This will allow you to recommend a webinar when someone starts talking about a particular subject in which they are interested.

New! Facts for Feds A series of short, instructive and informative articles on federal retirement, benefits, and employment options.

- ▣ [Steps to Take Before You Retire](#)
- ▣ [How to Apply for Retirement](#)
- ▣ [FERS Annuity Supplement](#)
- ▣ [Court-Ordered Benefits](#)
- ▣ [Survivor Benefits Under FERS](#)
- ▣ [FEHBP Coverage and Divorced Spouses](#)
- ▣ [Early Retirement Under FERS](#)
- ▣ [Applying for Medicare Part B](#)
- ▣ [Re-Employed Annuitants](#)

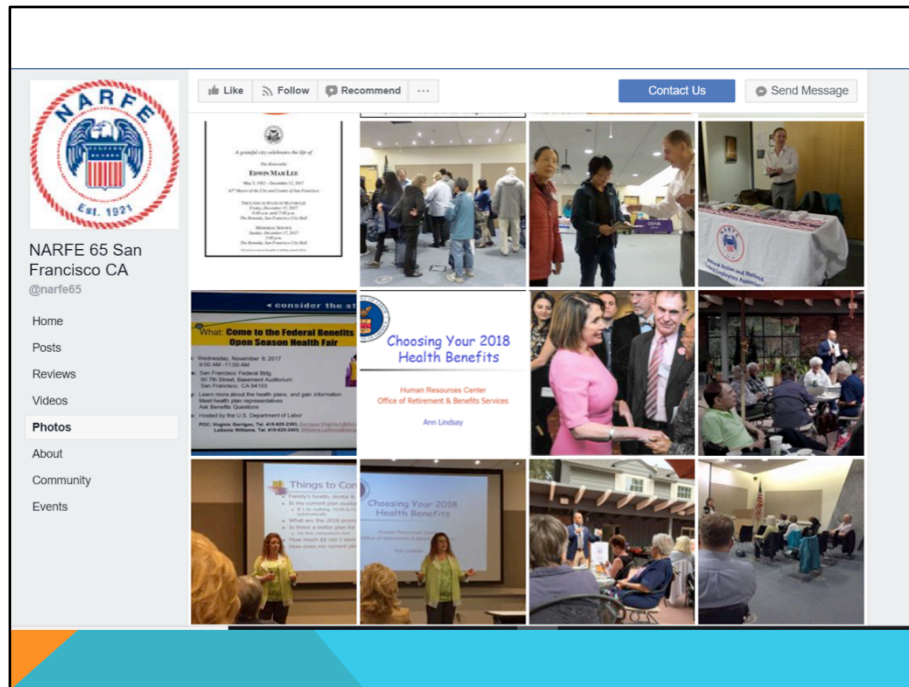
NARFE White Papers

- ▣ [How Much Money Do You Need to Retire?](#)
- ▣ [10 Worst Mistakes Federal Employees Can Make](#)
- ▣ [10 Worst Mistakes Retirees Can Make](#)
- ▣ [FAQs About Your Federal Benefits](#)
- ▣ [Speeding The Retirement Journey](#)
- ▣ [Top 10 Things Fed Spouse Needs to Know](#)
- ▣ [Survivor Benefits Guide](#)
- ▣ [Guide to TSP Withdrawal Options](#)

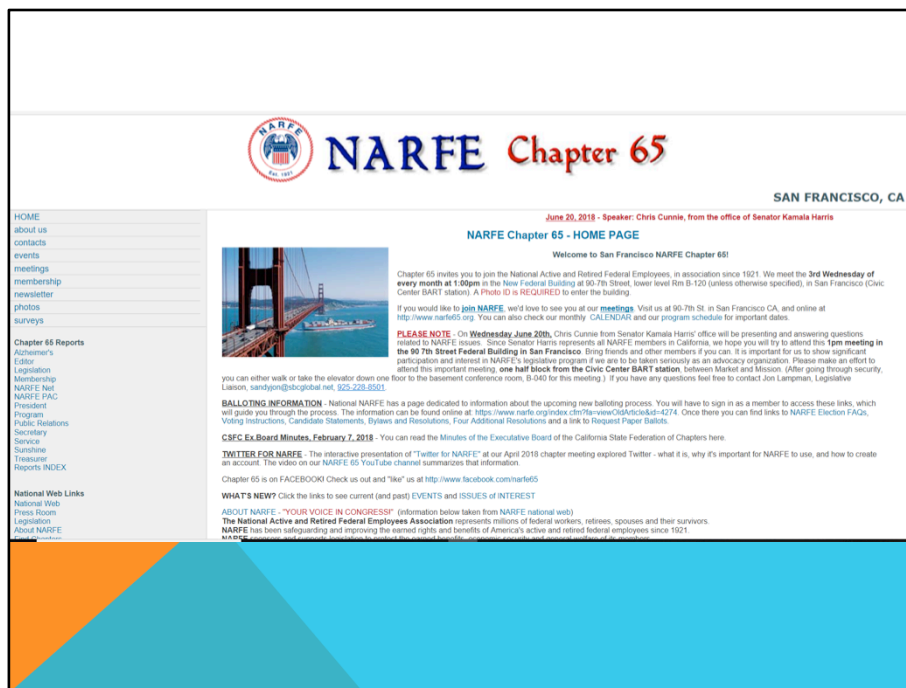
Resources

- ▣ [Be Prepared for Life's Events](#)

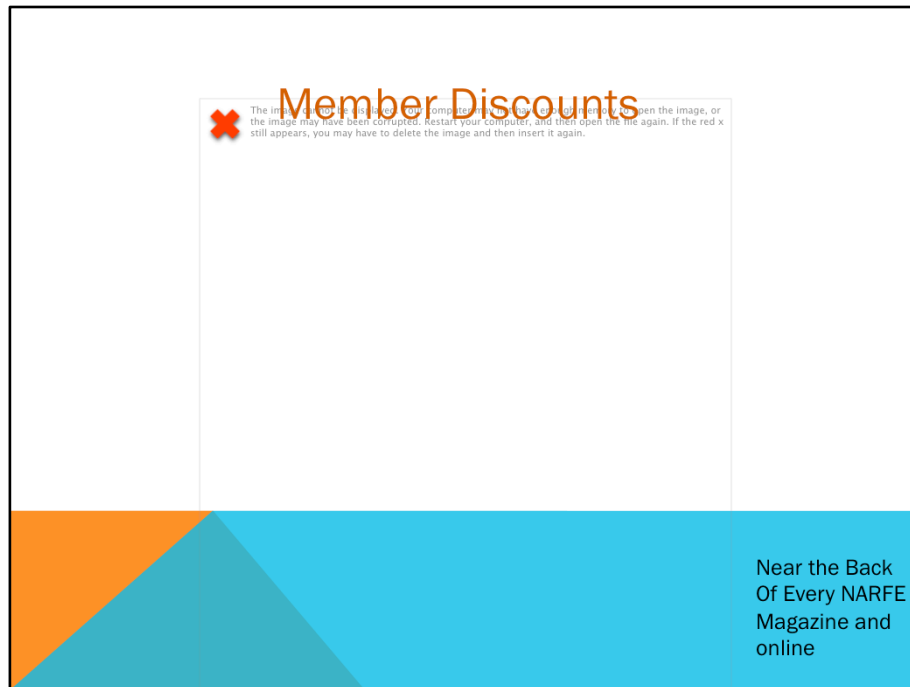
You will find a number of other articles on benefits on the **NARFE Federal Benefits Institute** web page. **Give a few examples.** eg. Steps to take before retirement, Top 10 Things Fed Spouses need to know, Early retirement under FERS, etc.



Many folks enjoy our Chapter Face Book page. Prospective members learn about our Chapter from our Facebook Page.



.....and from our web page. We also maintain a Twitter account to spread information affecting Federal Workers and Retirees. These electronic media are a quick way to obtain information on things related to NARFE and information for our members and prospective members.



Some members and prospective members are interested and use the Member Discounts. An excellent recruiter know these. NARFE has relationship and discounts for: INSURANCE, MOVING SERVICES, PRODUCTS, TELECOMMUNICATIONS, TRAVEL (HOTELS AND RENTAL CARS), and WELLNESS.

RETENTION – RENEWALS AND REINSTATEMENTS

1. NARFE's retention rate (renewals plus reinstates) is 92 percent.
2. An email newsletter series from NARFE titled "eConnect," is sent to first-year members as part of the national retention plan.
3. Retention Begins on Day One. Members join NARFE for various reasons.
4. When new members are engaged in the life of the organization within the first months of joining, they are more likely to stay members.
5. Develop your local plan to address non-renewals.

This is an important Part of Membership Marketing. Here are a few examples:• Send new members a special mailing during their first six months of membership.• If a new member joins a local chapter, encourage them to become active and participate in NARFE events, especially those concerning NARFE's mission and legislative agenda. Accommodate current federal employees and their schedules. Make sure that the benefits are communicated at all levels, in your meetings, your newsletter, your Facebook Page or Website, etc. **Reference or read the 5 items on the slide.**

The screenshot shows the NARFE website interface. The header includes the NARFE logo and the tagline "Protecting the Future for ACTIVE AND RETIRED FEDERAL EMPLOYEES". The navigation bar contains links for "NARFE Home", "MEMBER LOG OUT", "OAM Home", "About OAM", "FAQ", and "Contact Us". The left sidebar lists various resources under "OFFICERS RESOURCES" and "RESOURCE LIBRARY". The main content area is titled "Dues Withholding" and includes a note about Adobe Acrobat Reader and a list of downloadable forms: "Dues Withholding Application for New Members (Retirees) (DW-3)", "Dues Withholding Application for Retirees (DW-2)", and "Dues Withholding Brochure (F-86)".

OFFICERS RESOURCES

- » Forms By Form Number
- » Newsletters
- » Member Applications
- » Member Recruitment
- » Recruiter Posters
- » Chapters
- » Dues Withholding
- » Federations
- » Manuals & Guidebooks
- » Legislation Pamphlets
- » NARFE Programs Information
- » Order Forms/Supplies
- » Financial
- » Tips, Tools & Templates
- » Contact Us

RESOURCE LIBRARY

- » Headquarters
- » Be Prepared
- » Dues Withholding
- » White Papers

Dues Withholding

Note: An Adobe Acrobat Reader is required to fill out certain forms. Please [click here](#) to download it.

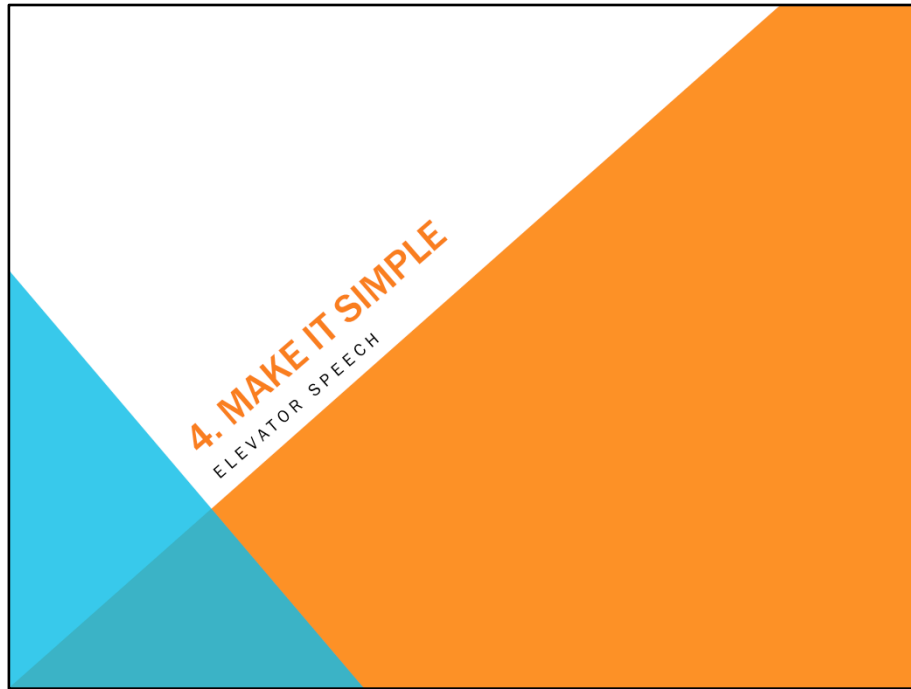
- » [Dues Withholding Application for New Members \(Retirees\) \(DW-3\)](#)
- » [Dues Withholding Application for Retirees \(DW-2\)](#)
- » [Dues Withholding Brochure \(F-86\)](#)

On the website you can download these important retention tools.

Dues Withholding: A Win/Win Retention Builder

- 1. It provides a convenient, discounted (15% less) payment plan for our retired members, spouses of retired members and survivor annuitants.**
- 2. It also helps NARFE keep down administrative costs while boosting retention.**
- 3. Once members go on dues withholding they continue their membership with no interruptions and keep NARFE strong.**

CA Federation has an incentive program administered by our esteemed Federation Treasurer, Yoggi Riley, (who just happens to be an outstanding recruiter). (I will talk about incentive programs a little later.) Nationally, 27 percent of qualified members participate in Dues Withholding. How does your chapter stack up? From your total membership, subtract Honorary Members, Life Members and Active Federal Employees. Your Dues Withholding membership as a percentage of this new total will provide the comparison. Set a goal to meet the national average, to beat it or to increase your already high rate of participation by 10 percent. Have Dues Withholding Applications (D-W2s) available at your meetings and annual events. Include an application in your newsletter. Dues Withholding applications are included with the renewal notices mailed to every retired member.



A simple clear message normally has the most impact when we are communicating a need, a value, or a membership in the case of NARFE. Additionally the amount of time you have at an event to talk about NARFE will likely be very limited.

NARFE Elevator Speech

A clear, highly focused elevator speech that makes certain in a limited time you are **answering**:

- What is NARFE?
- What does NARFE do?
- What are the benefits of NARFE membership?
- Why should I join?

Taken from the F-20 on NARFE's website

We seldom have the luxury of a relaxed, extended discussion with a potential NARFE member. Instead, it is the hurried pitch to busy attendees of a health fair or a brief, chance encounter with a newly discovered co-fed.

WHAT IS NARFE? An association established in 1921 to protect and enhance the benefits of Federal Workers and Retirees.

WHAT DOES NARFE DO?

NARFE has two primary roles:

- Your legislative voice. In-house, influential lobbyists advocate on Capitol Hill on behalf of the federal community.
- Your information resource. NARFE provides clear information and trusted guidance on complex federal benefits issues.

BENEFITS OF NARFE MEMBERSHIP

As a member of NARFE, you receive:

- narfe magazine — the primary source of information and guidance on critical legislation and benefit issues.
- Access to a team of federal benefits specialists for answers to complex benefits questions.
- FREE access to webinars and online resources to help you make the most of your federal benefits.
- Legislative alerts on issues that impact the federal community. NARFE's online Legislative Action Center gives you easy access to your member of Congress.

Responses to people who give excuses

“Someone else here is already a member.”

Response: “Good! Now, add yourself to the membership pool...”

“I was a member before and didn’t get anything out of it.”

Response: “I’m sorry you feel this way but here’s how NARFE protected you while you were a member...” (List a legislative accomplishments)

I just think these are sort of fun....not sure I would use any for fear of maybe producing a negative reaction..... But they’re sort of funny and quick witted. Quickly read the excuse and response on the slide.

Responses to people who give excuses

“I’m already a member of another association.”

Response: “Does that association do what NARFE does?”

“I just don’t see the benefit for me.”

Response: “Here’s how NARFE will benefit you. With your membership, NARFE can lobby effectively to protect your earned retirement benefits.”

Quickly read the excuse and response

Responses to people who give excuses

“It’s too much money.”

Response: “Here’s how NARFE saves you money...”

“We’re cutting back.”

Response: “Don’t let them cut back on your existing benefits...”

“Maybe later.”

Response: “Maybe later might be too late...”

Quickly read the excuse and response



When you share successes you accomplish several things:

1. You recognize the hard work of those who recruit and retain members.
2. You inspire others to focus on recruitment and retention and maybe encourage them to try new approaches.
3. Others begin to say, "I can do that."
4. You re-enforce the need for every member to recruit and retain members.

NARFE's Recruiting & Retention Journal
A publication for NARFE leaders to enhance recruitment, retention and pre-retirement seminars. www.narfe.org
February 2018

MEMBERSHIP NEWS

Fall Membership Campaign Wrap Up

From September 1 through December 31, 2017, many NARFE members seized the opportunity to earn \$10 for each new member they recruited, as well as get in the monthly prize pool for a drawing for a \$25 Amazon.com gift card and the grand prize of an Apple watch. Some chapters and federations encouraged participation with additional incentives. Efforts paid off for our individual recruiters and NARFE. We added 995 new members to the membership base over the four-month contest period. Here's a month-to-month view of recruiting activity:

Month	Members who Recruited	New Members Recruited
September	78	82
October	155	228
November	182	322
December	222	363
TOTAL NEW MEMBERS		995

With individual efforts rewarded at \$10 per member, NARFE was pleased to award monthly prizes of \$25 Amazon.com gift certificates and the grand prize to:

- September: Blanche R. Duranda of Northampton, MA, Chapter 484, recruited 3 members
- October: Cindy Wisell of Smithsburg, MD, Chapter 306, recruited 1 member
- November: Sherwood A Conner of Newark, OH, Chapter 310, recruited 2 members
- The **GRAND PRIZE** Winner of an Apple watch is Yoggi Riley of San Fernando Valley, Van Nuys, CA, Chapter 61, recruited 17 members

We wish to recognize these recruiters who ranked at the top of the charts:

This quarterly has some ideas that can be helpful. It is a great place to learn about what others are doing and can be a place for your you share what you are doing. If you don't receive it in the mail, go to the national website, narfe.org, and sign in and select officer resources, membership materials, and click on newsletters. It is available to all NARFE members.



The NARFE insider is also found in the same place on the website and is normally sent to sent bimonthly to officers. It keeps NARFE's Leaders up to date. I believe these publications help every recruiter be more knowledgeable as they work on recruitment and retention.

MATCHING FUNDS

- 1. The Matching Funds Program is a 50-50 match incentive designed to encourage NARFE federations and chapters to implement projects**
- 2. Matching funds require prior approval**
- 3. Funds will not be released until a final report for the event or project is completed and sent to NARFE Headquarters.**

You can also request funds from the Federation for the same or a different event.

Nationally you can request Matching funds for recruitment and retention efforts. You can also ask the federation to match 50-50 the remaining cost to the chapter, in effect the Chapter would only pay 25% of the cost of the effort.

OTHER INCENTIVES

CA Federation

1. New members
2. Dues Withholding

National NARFE

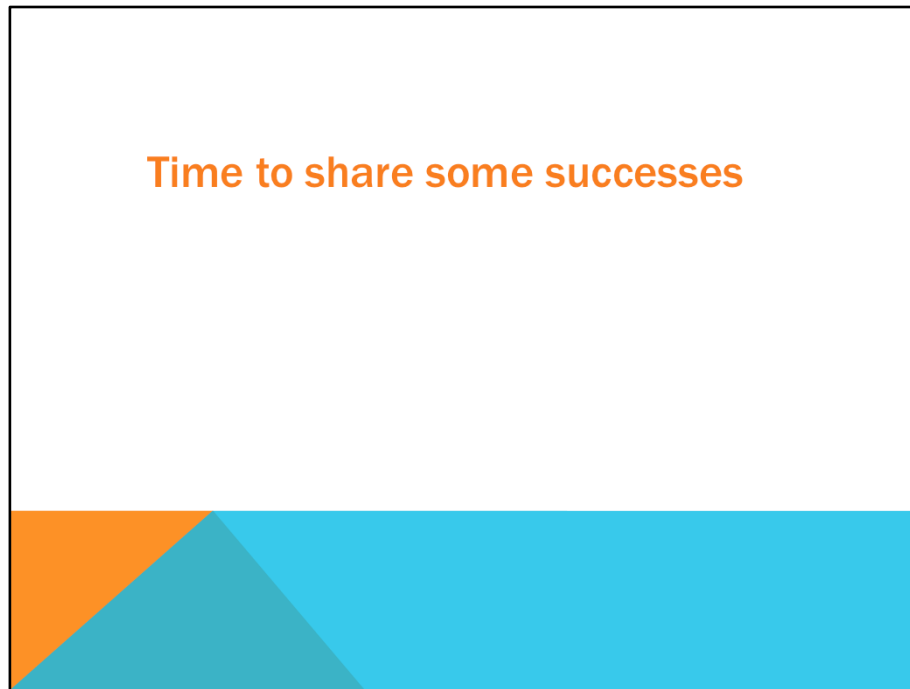
New members

1. Ongoing
2. Fall recruitment drive

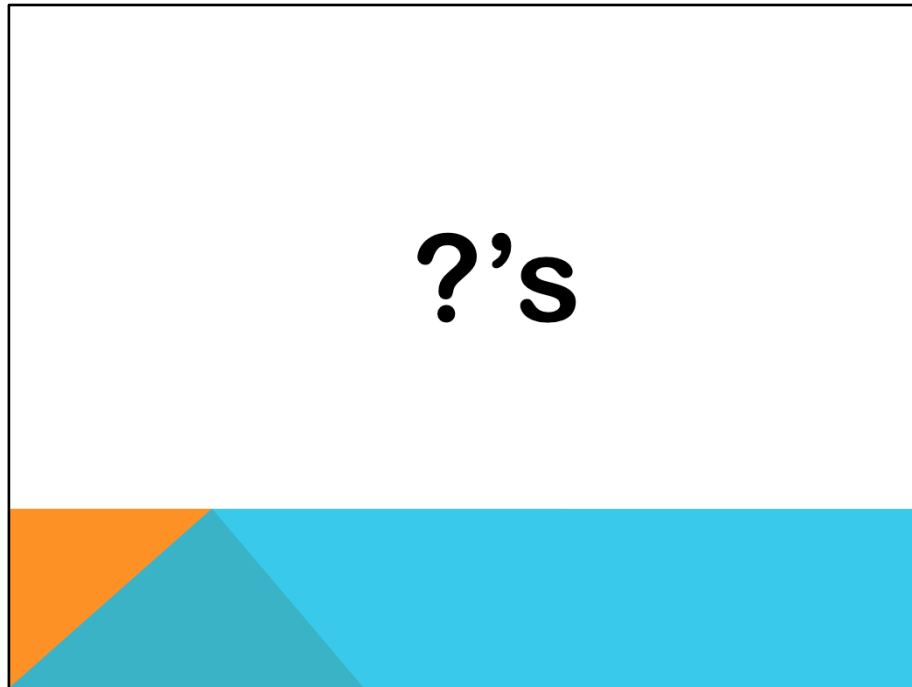
www.csfcnarfe.org/membership

Some members are quite incentivized by the rebates they receive for getting new members. Currently the CA Federation gives \$10 for each new recruitment and The national gives \$8 for new active federal workers and \$10 each Fall for all new members recruited. Any annuitant who signs up for dues withholding will receive a check for \$15.00. Any spouse who joins NARFE will receive a check for \$5.00. Any spouse who signs up for dues withholding will receive a check for \$5.00. Please Note: To claim a dues withholding rebate, the Chapter must send a copy of the M-112 Report to the CSFC Treasurer to verify dues withholding of the member. All CA Federation members who recruit ten (10) or more new NARFE members during the fiscal year will receive a check for \$75 following the end of the Fiscal Year.

If you want more information on membership, I recommend going to your Federation Website: www.csfcnarfe.org/ and clicking on membership.



I am sure that some of you have been successful at recruiting or retaining members. I know it can be challenging to recruit and retain members, but It is important that we share our successes. **Would someone like to share one of their successes? Call on someone if no one volunteers.**



I have a couple of minutes to answer any questions. Also I will be glad to share anything with you that I have. Just give me an email address and I will send it.

COMPONENTS FOR SUCCESS

1. Create a team
2. Enthusiasm (Belief in the mission of NARFE)
3. Know your materials
4. Communicate a clear message (Elevator Speech)
5. Share and appreciate successes

This summarizes today's presentation: Successful Recruitment and Retention happen when you have a team not one person committed to it. Belief in the mission of NARFE and communicating with passion a clear message will help you succeed. There are so many materials to help you with this important activity. And remember to show and share your appreciation for those work who work to make NARFE strong through their recruitment and retention efforts. Thank you for your attention and for all you do to recruit and retain NARFE members.