



# **California Federation Training**

June 2018

**Barbara Sido, CAE**  
Executive Director  
NARFE



## **The Importance of Chapters**

- Community
- Advocacy
  - National
  - State
- Local engagement
- A unique, member-driven experience



## **The Importance of Chapters**

Chapters offer a unique opportunity to learn, advocate and participate with fellow civil servants



## **Recruitment by Chapters**

Local recruiters are in a position to engage with potential members – matching NARFE member benefits with an individual's needs



## **Recruitment by Chapters**

Successful recruiters use prospect-driven pitches

- Federal benefits
- Advocacy



## **Recruitment by Chapters**

Successful recruiters find members:

- Health fairs
- Colleagues of currently employed members
- Federal buildings (access through cultivated local relationships)
- Working the prospect file
- Special chapter meetings



## **Recruitment Tools are Available**

Login  Officer Resources

- Member recruitment
- Recruiter posters
- Tips, tools and templates



# Recruitment Tools are Available

## ? Federal Benefit Questions? NARFE Answered Mine!

The *National Active and Retired Federal Employees Association* unravels complex federal benefits and helps members get the most out of their retirement and protect their families.



**National Active and Retired Federal Employees Association**

### NARFE works with you to:

- ✓ Protect Your Earned Benefits
- ✓ Ensure a Safe and Secure Retirement
- ✓ Guarantee Answers to Questions on Retirement and Benefits

Learn more at [www.narfe.org](http://www.narfe.org) or call 800-627-3394

Local Contact: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Local NARFE Chapter Meets:  
Day and Time: \_\_\_\_\_  
Location: \_\_\_\_\_



## Join NARFE Today!

National Active and Retired Federal Employees Association

**Feds!**  
**We Safeguard:**

- ✓ Federal employee health benefits
- ✓ Retirement benefits
- ✓ Compensation for federal workers and annuitants



**www.narfe.org**  
Or call 800-627-3394

## NARFE WEBINARS

Answers for the Federal Community

**FREE**  
with NARFE membership!

### NARFE WEBINAR PRESENTERS



Tammy Flanagan  
Federal Benefits and Retirement Expert



Mark Keen, CFP  
Financial planner with years of experience helping Feds prepare for retirement.

## 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
- TSP: Love It or Leave It
- Exploring TSP Withdrawal Options

### Health Benefits

- Alphabet Soup of Health Plans
- FEHBP and Medicare

Join NARFE to access these resources and more!



NARFE Federal Benefits Institute [www.NARFE.org/Institute](http://www.NARFE.org/Institute)





# Recruitment Tools are Available

## NARFE's Recruiting & Retention Journal

A publication for NARFE leaders to enhance recruitment, retention and pre-retirement seminars.

April 2017

www.NARFE.org

### HQ MEMBERSHIP NEWS

#### NARFE's 2016 Recruiting Contest Nets 1,070 Members

— By Monica Williams, Deputy Director, Membership Marketing, [mwilliams@narfe.org](mailto:mwilliams@narfe.org)

From September 1 through December 31, NARFE recruiters added 1,070 new members to our rolls. The members who participated in the recruitment drive earned \$10 for each new member and were eligible for monthly and Grand Prize drawings.

This year, 615 recruiters brought in new members during the three-month period. Winners of the \$25 Amazon.com Gift cards were:

- ❖ **November:** Carla Koty of Indianapolis, IN, and member of Chapter 9175
- ❖ **October:** Dominick Licciardi of Meraux, LA, and member of Chapter 1398
- ❖ **September:** Frank C. Impinna, Jr. of Highlands Ranch, CO, and member of Chapter 0081

- ❖ **The Grand Prize winner,** Steven C. Singleton of Las Cruces, NM, donated the value of the prize to the NARFE-FEEA Disaster and Scholarship Funds on behalf of Chapter 182.

We extend our sincere appreciation to all of our members who are dedicated to building NARFE membership and work to spread the word to their co-workers, friends and colleagues.

Watch future issues of the *Recruiting and Retention Journal* for details about the 2017 campaign. ■

#### NARFE Matching Funds Program Update

Every year, NARFE budgets a designated amount of money for the express purpose of assisting chapters and federations with recruiting. Chapters and federations may apply for the funds and get up to 50 percent of the total expenses for a qualifying recruiting event from NARFE.

Over the past year, with the encouragement, support and approval of the National Secretary/Treasurer, we have made some changes to the Matching Funds Guidelines in order to clarify the parameters of the program and provide a way to evaluate the effectiveness of the efforts we are supporting. Like any grant program, NARFE wants to ensure that the events it supports achieve the desired goal of driving member recruitment by developing prospects and memberships.

With that in mind, the Matching Funds Program is intended to support activities or events that put chapter recruiters in a position to engage current federal employees and/or annuitants in a conversation about membership. Local advertising campaigns may be considered, but require guidance from Headquarters.

If you are interested in tapping into the Matching Funds Program, please take note of the following:

- 1) Preapproval is required

CONTINUED ON PAGE 2

## Quarterly Journal

- Archived issues available online

<b>HQ</b>	<b>MEMBERSHIP NEWS</b>
	NARFE's 2016 Recruiting Contest ..... 1
	NARFE Matching Funds Program Update ..... 1
<b>FC</b>	<b>FEDERATION AND CHAPTER NEWS</b>
	Does Your Newsletter Engage Members? ..... 2
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<b>RR</b>	<b>RECRUITMENT RECOGNITION</b>
	Top Recruiters ..... 6
	Recruitment Credit to Members ..... 6



## **Chapter Member Retention**

- Deliver value
- Provide a positive experience
- Evolve with your members
- Maintain an online presence
- Vary your meeting time as necessary
- Canvass your membership



## **Chapter Leader Development**

- Simplify – fewer positions / fewer volunteers needed
- Start small – increasing asks with time
- Share roles and responsibilities
- Document expectations
- Provide a positive experience
- Ask



# Chapter Leader Development

## Understand volunteer motivation

Use special knowledge /skill	Be recognized / acquire status
Give life purpose	Feel useful and needed
Help others	Develop new skills
Enjoyment	Gain competencies
Reduce loneliness or boredom	

Reward and praise



# Headquarter Membership Recruitment

- Lead generation: building prospect file
- Prospect cultivation: engaging prospect and converting to member
- Acquisition: direct joins



# Headquarter Membership Recruitment



## FEDS! Take Charge of Your Financial Future

May 17, 2017

Download Your **FREE** Guide to Retirement Savings Planning **Here!**

**FREE Retirement Planning Help for Feds!**

How confident are you about YOUR financial plan for retirement? Get your **FREE Guide to Retirement Savings Planning** — and **BONUS Choosing the Right Financial Plan!**



### What You Will Learn

- ✓ Everything you financial plan
- ✓ Who to contact benefits
- ✓ Where to turn for
- ✓ PLUS our Bonus Financial Plan
- ✓ And more...

To learn more about Federal Employee /



**NARFE National Headquarters**

Sponsored ·

Understand Your Federal Benefits. Free From NARFE. Download Now.



### Federal Benefits Guide

NARFE: The National Active and Retired Federal Employees Association - the only organization dedicated to protecting and preserving your federal benefits.

DISCOVERNARFE.ORG

Download

Like · Comment · Share

## How Much Will You Need to Retire?



With so many diverse formulas, assessing your retirement needs can be complex and confusing. **Let the experts in federal retirement help!**

**Get your FREE download** from the National Active and Retired Federal Employees Association.

Click on this ad to get your **FREE** pdf download.



**Experts on Federal Retirement and Benefits**

New prospects are acquired via online advertising:

- Free NARFE guides to retirement, benefits, etc.
- To get the offer, prospects must enter contact information.



# Headquarter Membership Recruitment

View this message as a webpage | Learn more about NARFE | Forward to a friend | Join NARFE

**NARFE**  
National Active and Retired Federal Employees Association

**10 YEAR CELEBRATION**  
It's for federal employees and retirees who have been with the organization for 10 years or more. Celebrate with us!

[Download Now!](#)

**True Your**  
Take I see how vulnerable  
Never be much as your ear  
NARFE solely your focus  
Don't get lost in a message  
[Learn more](#)

**FEDERAL EMPLOYEES Pop Quiz**  
Learn how changing needs affect federal employees.  
What?  
- Retirement Savings  
- Health Savings Plan  
- Health Benefits  
**ALL OF THE ABOVE**

[Download Now!](#)

**Your earned federal benefits**  
NARFE is in the YOUR behalf.  
As the only member protecting and promoting the interests of federal employees and retirees as our membership.  
[Join NARFE now](#) single message we  
With budget battles a fight on reducing benefits are in the  
Your membership experts ensuring that retirees is heard.  
[Learn more about](#)

**NARFE – the Employees**  
Please take a moment to help NARFE share your behalf.  
As the only organization dedicated to YOUR earned benefits and your interest in them.  
[Take the NARFE Quiz](#)  
[Learn more about](#)

**Question: Who can you turn to for trust-worthy guidance on your federal benefits?**  
**Answer: NARFE, the National Active and Retired Federal Employees Association. NARFE takes the guesswork out of federal benefits and retirement planning.**  

- When do I need to start planning for retirement?
- What do I need to know about Life, Health and Long-Term Care Insurance?
- How will Social Security, Taxes and Retirement affect my retirement income?

NARFE is dedicated solely to helping federal employees and retirees get the most out of your benefits and plan for a secure retirement.  
[Learn more about NARFE](#) | [Join NARFE today!](#)

**Just Updated!**  
Unravel the complex rules and regulations hidden in your earned federal retirement and benefits. This guide to federal benefits is FREE with your NARFE membership.  
[Join NARFE Online Today](#) to receive your FREE O&A Guide. Just updated, this 60-page guide answers frequently asked questions about many of the complex and confusing issues surrounding federal benefits.

NARFE, 606 North Washington Street, Alexandria, VA 22314, 800-456-5410, 703-638-7760  
If you prefer not to receive these messages, you may unsubscribe at any time by [clicking here](#).  
If you are a current NARFE member, please enjoy the information and be assured your membership record is up-to-date.  
Please help us eliminate duplicate emails by sending an email to [newsletter@narfe.org](mailto:newsletter@narfe.org) with a subject line stating that you are a current member. Thank you.

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Six-part email series begins conversion from prospect to member





# Headquarter Membership Recruitment

There are problems with how this message is displayed, click here to view it in a web browser.

Richard G. Thissen, NARFE <membership@narfe.org>  
Durham, Jennifer (MGI)  
Smith, Christyl (MGI)

Test Send - (437-NARFE-7673-204-MayWebinar) Estate Planning for Feds -- New Webinar on May 11



Mr. Bridger Reed  
606 N. Washington St.  
Alexandria, VA 22314-1914

**IMPORTANT!**  
FEDERAL RETIREMENT BENEFITS UPDATE

Dear Bridger:  
Let's face it. Federal benefits are complicated -- before, during and even after retirement. And as the rules surrounding your federal benefits multiply, budget cuts shrink your access to knowledgeable staff within federal agencies and at the Office of Personnel Management. This is an issue.

A missed deadline, an improperly completed form, a misunderstood option or opportunity could cost you thousands of dollars over your career and retirement, leave your loved ones without insurance, or leave you without the valuable benefits you have earned. The consequences are real. The solution is simple.

Join the National Active and Retired Federal Employees Association (NARFE). For just \$39.95, you are guaranteed access to comprehensive, easy-to-understand information that will help you manage your federal benefits, maximize your knowledge and minimize your risk.

When you join, you will have access to a full range of member only resources to keep you in the know and help you need.

- Connect with a NARFE Federal Benefits Services specialist by phone or email to get answers to your complex benefits questions. You get a one-on-one consultation with you sort out your specific issues.
- Stay up to date with legislation and available information and to maximize your benefits.
- Become an expert on your benefits. NARFE's Federal Benefits Services specialist will record and respond to your questions.

**What Every Fed Ought to Know About Their Benefits - FREE for NARFE Members**

**Join NARFE today!**  
Join NARFE for \$39.95  
NARFE members receive:  
• Exclusive access to NARFE's Federal Benefits Services specialist  
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## NARFE Federal Benefits Institute

### Estate Planning for Feds A NARFE Federal Benefits Institute Webinar

Thursday, May 11, 2017 at 2 p.m. ET

Regardless of your income, personal wealth or current state of, estate planning isn't something you should put off!

A few hours of planning on your part will ensure a smooth settlement for your beneficiaries, and maximize estate tax savings. Feds need to consider the impact of their annuity and TSP account as well as other assets.

Mark A. Keen, CFP and narfe magazine's "Managing Money" columnist, pulls estate planning out of the shadows with a straightforward outline of what you need to keep your assets and your interests intact.

Register today for this one-hour webinar on May 11, at 2 p.m. ET. Stay online for a VUS one-hour Q&A session.

**What You Will Learn:**  
• How to create estate planning documents that everyone needs  
• How to benefit from your federal benefits  
• How property passes on - and how you can make sure it goes where you want it!  
• How to avoid probate?

**Register for the webinar here.**  
Registration includes NARFE membership. If you are unable to attend, the webinar and chat questions will be available online within 48 hours of the event.

**Retired Federal Employees Association - Experts on Federal Benefits**  
Washington Street, Alexandria, VA 22314, 800-627-3394, 703-838-7760  
Give these messages, please unsubscribe at any time by [clicking here](#).



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Mark Keen, CFP is a financial planner with years of experience helping Feds prepare for retirement. As the expert behind narfe magazine's "Managing Money" column, Mark provides knowledgeable and targeted saving strategies for the federal community.

Register today for this hour-long webcast PLUS Bonus Q&A session exclusively for NARFE members from the NARFE Federal Benefits Institute.

**Register Today!**

retirement  
seminar

and avoid  
this new  
your

Marshall,  
Institute.

retirement  
seminar  
consider

**ALL-NEW WEBINAR  
REGISTER TODAY**

**Map Your Path to a Smooth Retirement** *New!*

**Webinar plus Q&A**  
with **James Marshall**,  
NARFE Federal  
Benefits Expert

 **NARFE Federal  
Benefits Institute**

Bimonthly mailings to the prospect file and OPM lists, as well as webinar ads and email invitations, bring new members





# **What's New at NARFE**



## Advocacy

- Two-year bipartisan **budget agreement**
- **CDL** model a 2018 priority
- **Mid-term** opportunities
  - Relationship building
  - NARFE-PAC



## ***narfe* Magazine Gets High Marks in Reader Survey**

- **High** satisfaction ratings
- **Avid** readership
- Members **driven** to action



## **Federal Benefits Institute Continues to Attract, Retain Members**

- **Expertise and resources** on federal benefits
- **Webinars** successful recruiting tool
  - More than 4,000 members
  - Chapter programs built around webinars



## **Membership Trends**

- **The factors of membership we have control over are all trending positive**
  - Recruitment rose 28% over 2016
  - Retention at 94%
- **Month-by-month decline slowing**
- **OPM response rates increasing**



## Our Image

- **Image** of the federal community
  - Influencer analysis
- **Image** of NARFE
  - Brand messaging



# **NARFE NEXT STRATEGIC INITIATIVE**



## NARFE 2021 CENTENNIAL

As we prepare NARFE to meet its centennial **strong** and **relevant**, we will begin plans to celebrate NARFE's 100<sup>th</sup> year of service to the federal community





## NARFE Next is...

- A strategic initiative to ensure NARFE remains **relevant** as we approach our centennial
- Position NARFE as the **go-to resource** for the federal community



## Business Model Innovation

- Examining current business model – what NARFE does and how we do it
- Want to make certain resources are appropriately allocated to provide **maximum value** to members



# **NARFE NEXT NOW**



# **FEDcon18**

**LEARN • ADVOCATE • LEAD**

**August 26-28, 2018**

**Hyatt Regency Jacksonville Riverfront  
Jacksonville, Florida**

**[narfe.org/fedcon18](http://narfe.org/fedcon18)**



# **FEDcon18**

LEARN • ADVOCATE • LEAD

NARFE's **premier** training conference

- Outstanding educational **sessions**
- Nationally recognized **experts and celebrities**
- **“NARFE Town”**
- **Tours and wellness activities**
- Coming together as a **community**



# **NARFE NEXT NEW**



## **New Ways to Demonstrate Value**

- Prototypes in development
  - Premium benefits services
  - Digital decision tree
  - Podcasts
  - Mobile app



**Questions? Thoughts?**

**[execdir@narfe.org](mailto:execdir@narfe.org)**